

# 2012 LeadingAge 100 Ziegler



**The nation's 100 largest not-for-profit senior living—**

- Multi-sites
- Government-subsidized housing multi-sites
- Single campuses

*LeadingAge*™

 **Ziegler**



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Quality First is a public promise by aging services providers to take responsibility for raising the bar in our field. It is an external covenant to achieve healthy, affordable and ethical aging services for America—and an internal method by which provider organizations can fulfill such commitments to excellence. LeadingAge offers programs and resources, such as this report, that are based on the latest aging services field-related research and knowledge—including valuable tools, information, education and support to help members honor the Quality First covenant.

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The 2012 LeadingAge Ziegler 100 confirms, once again, the significant role that LeadingAge member not-for-profit organizations play in the aging services field. This report, like the eight editions preceding it, presents a snapshot of the longstanding story of our members' enlightened leadership, transformation and good works. By telling their stories, these organizations are engaged in shared learning – sharing their experiences and strategies with the entire field. At the same time, they are helping to increase public awareness and understanding of our sector of long-term services and supports.

Since its inception in 2004, this publication has become an eagerly anticipated annual report of the largest, most complex not-for-profit aging services organizations. Since the first report's focus on the 100 largest multi-site organizations, the LZ 100 has expanded to tell the story of the nation's largest government-subsidized housing multi-sites and single campuses, as well. From the oldest organizations to the youngest, from largest to smallest, each has a unique story to tell. Each organization's story is one of commitment to mission, community support, stewardship, resilience and a reputation for fulfilling

obligations.

In 2012, LeadingAge members are addressing complex challenges creatively. Their governing boards and senior leaders are engaging in effective strategic planning to reposition, grow, change, partner, innovate and venture into new service possibilities responsibly.

While the LeadingAge Ziegler 100 is not designed to be a qualitative report, behind each of the organizations ranked within this publication, nevertheless, is a story of governance and leadership committed to quality services and long-term success. The LZ 100 paints a picture of a vital part of America's aging services continuum that continues to be a driver of enlightened leadership, change and commitment to expanding the world of possibilities for aging.

LeadingAge is pleased to partner with our friends at Ziegler to bring you the LeadingAge Ziegler 100, ninth edition.

William L. Minnix Jr., D.Min.  
President and CEO

LeadingAge



The ninth edition of the LeadingAge Ziegler 100 reflects market trends of 2011. Similar to other recent years, 2011 did not fall short in providing its challenges to providers. The nation faces healthcare reform, a housing market that is emerging from crisis, and a sluggish economy. As a result of these challenges, providers are looking to new and innovative ways to attract residents. Organizations are focusing marketing across all facets of their campuses in order to attract and retain residents at their communities. Management's decisions as they are faced with challenging times begin to create various trends that can be noted in the LZ 100 publication from year to year.

As we continue to work with LeadingAge on this publication, we strive to expand upon new areas of research—particularly related to corporate structure and revenues—that perpetuate Ziegler's desire to bring new and fresh perspectives to the analysis of the not-for-profit senior living sector.

Once again it is through our research in producing the LZ 100 listing that we can study the characteristics of the nation's largest not-for-profit providers. What are the characteristics of their growth and change?

What can we glean from these profiles that may offer other not-for-profit providers a model for their own successful growth?

To answer these and a host of other questions, Ziegler began its research in 2002. Just as all multi-site senior living organizations have been, at their inception, a single-site, so this listing began with one senior living provider. We were analyzing how quickly and by what methods one of our clients, a multi-site organization, had grown. The natural way to study this growth was through comparison with another system's growth, then another, then another. Soon, it became clear that a comprehensive study of the not-for-profit universe of senior living system providers would have enormous value for those interested in understanding senior living and the largest senior living providers. You will see in this year's report that home and community-based services are still emerging as a vehicle by which many organizations are growing their service-based activities to fulfill their missions, not only within their organizations' walls but in the greater community as well. You will also see the expansion of the assisted living area and a downsizing of skilled nursing facilities as providers respond to the needs of their residents, as well as the surrounding community.

Because LeadingAge's membership is exclusively not-for-profit senior living providers, LeadingAge has been a perfect partner for our research. We are now tracking nearly 500 organizations for the compilation of the LZ 100 listings. With each successive year of data, new trends and patterns emerge that should be of interest to those evaluating change in their own organizations. We look forward to the ongoing development of the LZ 100 and the opportunity to enhance this tool even further to assist the not-for-profit senior living provider not only to survive, but thrive.

Daniel J. Hermann  
Senior Managing Director, Head of Investment Banking

Ziegler

# LeadingAge 100 Ziegler



# The LeadingAge Ziegler 100 Objective

Both LeadingAge and Ziegler are nationally recognized organizations serving the growing aging services field. The LeadingAge Ziegler 100 (“LZ 100”) began through the desire of these two organizations to examine and understand the not-for-profit senior living sector. Our goal is to present current data that illustrates the size of the not-for-profit segment of the senior living sector, creating an awareness of the characteristics of growing systems and overall trends of system growth. With the help of the LZ 100, we hope to further the understanding and delivery of successful senior living. The LZ 100 formulates more than just lists. It also provides a means for analysis of detail behind the listings. This year’s ninth edition of the LZ 100 provides a greatly enhanced set of data analyses.

The 2012 LeadingAge Ziegler 100 lists the largest not-for-profit systems providing aging services through senior living in the United States, by order of their total owned market-rate units, as of **December 31, 2011**.

# LeadingAge 100 Ziegler

# Chapter 1

## Understanding the LeadingAge Ziegler 100

### Importance of Not-for-Profits

A crucial difference between not-for-profit and other businesses is the approach of not-for-profits to decision making. While many businesses begin with questions such as how to ensure a reasonable return for their shareholders, a properly focused not-for-profit organization asks different questions. What is best for the residents and clients we serve? What is best for our community? And how can we reinvest revenues for the betterment of the entire community?

Not-for-profits can be found in virtually every community in America—rural communities, suburban communities, micropolitan, metropolitan areas and inner-city neighborhoods. Founded to address unmet social needs in the broader community, most not-for-profits have a common willingness to find a way to meet the needs of their communities. Not-for-profits seek to provide outreach programs that deal with the most pressing—and often changing—social issues of a diverse population including older adults, at-risk children and families, and others who are facing challenges.

Not-for-profits offer a focused, supportive environment in senior care. Studies bear this out. *Aging Services: The Not-for-Profit Difference* (LeadingAge, 2012) cites a literature review of many credible sources whose research findings affirm the leadership that not-for-profits provide in quality housing, care and services. In 40 studies, all statistically significant comparisons favored not-for-profit providers. Because of their vision and commitment, not-for-profit organizations have stood the test of time and are in a powerful position to effect change. They have created a new standard for care, dramatically shifting the way America cares for seniors.



LeadingAge believes not-for-profit services to be some of the best social services in the country, their passion and commitment to quality shaping the not-for-profit philosophy. This dedicated enthusiasm of not-for-profits has inspired boards of directors, attracted volunteers and devoted staffs, and led to groundbreaking innovations in the way we care for the elderly. A mission-driven philosophy of service with dignity and respect for the person is the inherent benefit the families and residents of not-for-profit senior living communities have found (whether independent living, assisted living or nursing care).

Many not-for-profit providers (in fact, 26 from the 2012 LZ 100) have risen from modest beginnings more than a century ago to become vital community resources today. They continue to build legacies of caring, giving and selflessness while expanding their capabilities and honing their skills, striving to provide service for generations to come.

## The LZ 100 Development

The LZ 100 has been produced by two expert organizations in senior care: LeadingAge, the nation's largest association of not-for-profit aging services providers in the country, and Ziegler, the nation's #1 ranked underwriter of tax-exempt and not-for-profit financings in the United States for senior living<sup>1</sup>. Joining together to prepare and present the data, LeadingAge and Ziegler founded the LeadingAge Ziegler 100. The combined expertise of LeadingAge and Ziegler yields a reliable, useful and valuable source of information.

### LeadingAge

To expand the world of possibilities for aging, LeadingAge members and affiliates touch the lives of 4 million individuals, families, employees and volunteers every day. The LeadingAge community ([www.LeadingleAge.org](http://www.LeadingleAge.org)) includes 6,000 not-for-profit organizations in the United States, 38 state partners, hundreds of businesses, research partners, consumer organizations, foundations and a broad global network of aging services organizations that reach over 30 countries. The work of LeadingAge is focused on advocacy, leadership development, and applied research and promotion of effective services, home health, hospice, community services, senior housing, assisted living residences, continuing care communities, nursing homes, as well as technology solutions, to seniors, children, and others with special needs.

### Ziegler

Ziegler ([www.ziegler.com](http://www.ziegler.com)) is the nation's leading underwriter of financing for not-for-profit senior living providers, serving financing needs of senior living, housing and healthcare providers. Ziegler delivers innovative and comprehensive financial services through: investment banking; financial risk management; investment management; affiliation, merger and acquisition expertise; seed capital; capital and strategic planning services; and FHA-mortgage banking. Ziegler's annual education series offers networking and educational opportunities for senior living providers, capital markets' participants and industry professionals serving the senior living sector.

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<sup>1</sup> 2011 ranking data and amounts provided by Thompson Financial Securities Data as of 1/6/12.

## The LeadingAge Ziegler 100 (LZ 100)

The genesis of the LZ 100 research was to quench a thirst for answers related to the growth of not-for-profit systems. Ziegler had compiled extensive, but primarily anecdotal, information about not-for-profit senior living, gleaned through its experience in working with specific organizations. While useful, this information did not represent the not-for-profit senior living sector as a whole. Ziegler had a host of questions it wished to answer for itself, for its clients and for those interested in investing in the senior living sector:

- Who are the largest senior living providers in the nation?
- When were these not-for-profit providers founded and when and why did they emerge into systems?
- How are not-for-profit senior living systems changing: by expansion, new community construction, merger, acquisition and affiliation and/or disposition?
- How quickly are not-for-profit systems growing? What is their pace of growth?
- How are not-for-profit senior living systems staffing this growth and what are the tenure and turnover rates among their key executives?
- Where is the most significant growth occurring?
- How are growing systems reconfiguring their mix of units (independent living/assisted living/memory support/nursing)?
- How are systems evaluating their market breadth? i.e., how do they evaluate their boundaries?
- How many of the systems incorporate affordable housing in their portfolios?
- How many of the senior living systems have debt that is rated?
- How many of the communities accredited by CARF-CCAC (Commission on Accreditation of Rehabilitation Facilities-Continuing Care Accreditation Commission) are part of systems?

By assembling and presenting the combined data and knowledge of LeadingAge and Ziegler, the LZ 100 publication answers many of these questions. From its inception, the creation of the LZ 100 was an innovative move for those involved with not-for-profit senior living. To our knowledge, listing the largest not-for-profit senior living systems by the number of units they own and operate, representing the number of residents they serve, rather than by their financial success, created a new way of ordering systems, providing a fresh perspective on what was previously understood as a known market. The journey in creating and updating the LZ 100 annually has provided a wealth of data by which to understand and analyze the characteristics of senior living system providers' growth and change.

The organizations in the LZ 100 have made strategic decisions over the years, sometimes to grow and expand to serve a broader community, sometimes to dispose of communities and reposition a portfolio of properties and markets served. The LZ 100 is only the beginning of a profile of providers who are delivering services to the elderly community, both residential and home-based. Thousands of not-for-profit providers are playing an important role in the United States. We embrace each organization's contribution to the populations it serves. Not-for-profits are strong in numbers and bound by shared values, no matter the size of the organization.

Each year we have received positive feedback from both the LZ 100 organizations listed in the inaugural and subsequent publications, and those who desired to be incorporated in the listing. Our initial objective of listing the largest not-for-profit senior living systems has not changed; however, each year through the help of the organizations we are researching, we have updated and cleansed their growth/change data. This 2012 publication of the LZ 100 is not simply a re-publication but an enhanced and updated publication with new findings.



# Chapter 2

## The Largest 100

### A Quantitative Listing

LeadingAge and Ziegler are not the first to develop a listing of organizations or companies. Many common listings include qualitative factors, such as “best” or “worst” or “most successful.” U.S. News and World Report’s assessment of “Best Hospitals in America” and Fortune magazine’s “Most Admired Companies” are examples of these sorts of listings. Other listings are based on quantitative, objective measures alone. Fortune also produces the “Fortune 500” (derived from public information), a listing of publicly traded companies ranked by annual revenues. Modern Healthcare, a publication focused on the acute care sector, annually ranks health care systems, listing them by net revenue.

Following the footsteps of these influential publications, the LZ 100 also uses a quantitative means of listing. The LZ 100 lists not-for-profit multi-site organizations based on the total number of senior living units (excluding government-subsidized [affordable] units) that each system owns and operates. The **Primary Ranking** is ranked by size—based on total units—carrying no qualitative value judgment in the ranking. Size does not connote quality, nor does it connote financial strength. Both LeadingAge and Ziegler want users of the data to see the LZ 100 as a statement of fact, not as an endorsement.

## Methodology

### Defining a Multi-site Organization

For the purposes of the LZ 100 listing and analyses, a multi-site organization, or system, has been defined **as a LeadingAge-member not-for-profit organization that owns and operates senior living on more than one campus**. While it is understood that systems may also manage units they do not own, these managed, non-owned units are subject to frequent change and so are not included in the total unit count compiled in the LZ 100 **Primary Ranking**. However, as before, we offer an examination of the extent to which the LZ 100 organizations manage units they do not own. (Chapter 4, Charts 4-16a-c)

It is also understood that some organizations may consider themselves a system if they own, for example, a nursing home on one side of the street with independent living units on the other. We have excluded these organizations from the listing. However, an organization may have multiple community types in close proximity and may market these communities independently of one another. While these types of organizations—with properties contiguous or in close proximity—were not considered systems in the first LZ 100 publication (2004), upon reconsideration we began to include them in subsequent publications (e.g. Willow Valley Retirement Communities [PA]).

It should be noted that two types of systems have been intentionally excluded from the LZ 100 listing: (i) systems that are composed primarily of government-subsidized (affordable) housing and (ii) systems that are composed primarily of acute or post-acute services or health care systems. Rankings of the first of these two categories of LeadingAge-member multi-site organizations are provided later in the publication (Chapter 6: Additional Listings). Research into health care systems that sponsor senior living will be produced at a later date.

### Compiling the Listing

The LeadingAge Directory of Members was a critical source in compiling the first LZ 100 ranking in the 2004 publication. Using the list of multi-community sponsors in the directory, Ziegler compiled a listing of providers and ordered the organizations on the list by each organization's number of total senior living units (excluding government-subsidized (affordable) housing units, which are, as mentioned earlier, ranked in a list of their own later in this publication). Considerable discussion also occurred with regard to systems in financial distress. Other listings were consulted for guidance in this area, resulting in exclusion of any organization that has publicly declared bankruptcy.

For each organization, Ziegler attempted to trace the history of growth in the organization, starting with the date of inception. The pattern of growth for each system is created by recording the year in which change occurred—by expanding existing communities, building new communities, acquiring existing communities or disposing of communities or units. Web sites, official statements from bond offerings, ratings reports and marketing materials were consulted to determine these changes in the first publication. The LeadingAge membership database is a resource for compilation of the listing, as are other public resources, but subsequent publications have verified data through written confirmations by staff members of the organizations themselves.

Data used for ranking the 2012 LZ 100 were provided and confirmed (“confirmation”) by 100 of the 100 organizations. Thirty-two (32) confirmations were received from the “next 50,” the organizations ranked from 101 to 150. Twenty-six (26) confirmations were received from the next “next 50,” the organizations ranked from 151 to 200, and 4 confirmations were received from the 16 remaining systems tracked for inclusion in the listing. All organizations marked with an asterisk in Charts 3-1e-f did not submit an LZ 100 response. A total of 216 not-for-profit systems were studied for inclusion in the 2012 LZ 100 ranking of not-for-profit, multi-site senior living organizations. In all, nearly 500 organizations have been examined for preparation of the listings in this publication.

Although the information used for the compilation of the LZ 100 was provided in nearly every case by the organizations themselves, some organizations cannot trace their histories to the degree of accuracy desired for the LZ 100 analyses. For instance, the Pace of Growth chart for Christian Homes (LZ 100 #16) (Chart 5-4o) shows the change in total units from year to year, with a snapshot of the unit mix as of 12/31/03. Changes in each unit type are shown from 2003 onward, when data tracking began for the LZ 100 publication. In this and other such cases, historical information has been extrapolated and the current information validated. For some analyses (e.g., the same-store unit and community build-back from 2011 to 2000) where detail was unavailable, unit mix in prior years with uncertain histories was approximated based on the most recent current mix data. The LZ 100’s listing can be tabulated by any one of the variables tracked for the systems. Again, in no way should readers construe the ranking in any of the categories as a measure of quality or value.

## Key Findings

Some of the key findings from this compilation of data include:

- **An understanding of size ...** The systems range from 18,934 units to 782 units.
- **Information on unit mix ...** The 10 largest providers of senior living represent approximately 36 percent of the total number of units for all systems in LZ 100.
- **An appreciation of the rate of growth ...** In the last ten years the average annual growth rate in total units is nearly 3 percent.
- **Insights into type of growth ...** The LZ 100 have grown primarily through expansion. Nearly 90 percent of the LZ 100 organizations now offer designated memory-support units and nearly 170 small house communities are sponsored by the LZ 100.
- **A discovery regarding the method of growth ...** The number of communities of the LZ 100 undergoing expansion in 2011 (40) was nearly 30 percent higher than from a decade ago (31).
- **A glimpse of the geography ...** The systems provide market-rate senior living in 43 states and subsidized housing in four additional states, as well as DC, Puerto Rico, and the U.S. Virgin Islands. The state in the LZ 100 with the highest number of system headquarters is Pennsylvania. Minnesota has the largest total number of communities.
- **A commitment to serve ...** In addition to the nearly 201,000 units represented in LZ 100, 54 percent of the systems offer affordable housing.



# LeadingAge 100 Ziegler

# Chapter 3

## Rankings

### The LZ 100 Not-for-profit Multi-site Senior Living Organization Rankings

As in other presentations of this sort, data can be ‘cut and sliced’ across a variety of time periods: one year, five years, ten years or more. The growth of some LZ 100 organizations may be most dramatic across a five-year period; others may have more change across a ten-year period. Nearly every listing of this sort focuses first, however, on change on an annual basis. Therefore, the **Primary Ranking** (Chart 3-1a) of the LZ 100 is by total senior living units with the 2012 and 2011 rank shown. Charts 3-1b-d rank the organizations by market-rate independent living units, by assisted living units and, finally, by nursing care beds. When 2012 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations, i.e. by Total Senior Living Units (Chart 3-1a).

**The 2012 Rank.** The 2012 Rank column displays the numerical ranking of each system according to its 12/31/11 data within the LZ 100 for each of the four listings: by Total Senior Living Units, i.e. the **Primary Ranking** (Chart 3-1a), by Total Independent Living Units (Chart 3-1b), by Total Assisted Living Units (Chart 3-1c) and by Total Nursing Care Beds (Chart 3-1d). An organization’s ranking in each respective listing may change depending on the composition of its unit mix, that is, the mix of independent living units to assisted living units to nursing units within its system of communities.

**The 2011 Rank.** The 2011 Rank shows the numerical ranking of the listed organization on last year’s publication (according to its 12/31/10 data) listing of the same type. The three organizations that show “NR” (Not Ranked) in their ranking were not included in the LZ 100 rankings in 2011.

**System Name.** The **Primary Ranking** uses the current system name as of the time of publication. Four organizations from the LZ 100 reported name changes during 2011. See Chapter 4 and Chart 4-7 for additional information on these specific organizations.

**State.** This field notes the location of the system's corporate headquarters. For example, Volunteers of America provides senior living in multiple states. The state shown for this organization is Virginia (VA), the location of its headquarters.

**Units (as of 12/31/11).** The systems listed in the 2012 LZ 100 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/11. Managed communities that are not owned will be discussed later in the publication (Chapter 4, Charts 4-16a-c) and are not included in the total community count compiled in the LZ 100 **Primary Ranking**. Government-subsidized (affordable housing) units are also excluded from this count but are presented for each of the LZ 100 organizations in subsequent listings (Charts 4-15a, 6-3).

**Total.** The Total column is the sum of the units listed in each of the three different levels of care (described in more detail below). This total is the variable by which the LZ 100 is ranked for the **Primary Ranking** (Chart 3-1a).

**Independent living units (ILU).** Independent living units may be composed of apartments, duplexes, triplexes, quadplexes or single-family homes. Typically, residents in independent living units pay a combination of a monthly fee and one-time entrance fee to live in the unit. (Note: some residents own these units, but this type of equity model represents a very small number of the independent living units within the LZ 100.) Those who pay a monthly fee will usually receive services such as housekeeping, maintenance, dining, security, lawn maintenance and other services.

**Assisted living units (ALU).** Assisted living bridges the gap between independent living and nursing home care. Trained employees provide supportive care to residents who are unable to live independently and require assistance with activities of daily living (ADLs), including management of medications, bathing, dressing, toileting, ambulating and eating. Personal Care or Residential Care Units (PCU/RCU) are included in the overall ALU total for LZ 100 organizations. These units share similarities with ALUs but are not licensed as such, and are offered at the communities of eight (8) LZ 100 organizations.

**Nursing care beds (NCB).** Nursing care beds provide care for those who need rehabilitative care or can no longer live independently because of a chronic physical or mental condition that requires round-the-clock nursing care. Meals, laundry, housekeeping and medical services are provided. In most cases, these units are licensed for Medicaid and/or Medicare reimbursement.

*Note: When information sources identified memory support units by level of care, the units were split accordingly between assisted living and nursing care beds. If units were undesignated, they were considered as nursing care beds.*

Many of the not-for-profit organizations have combined independent living, nursing and/or assisted living on one campus. These campuses are typically called continuing care retirement communities, or CCRCs (described in more detail below). Most of the organizations in the LZ 100 have CCRCs within their portfolios; however, for purposes of unit rankings, the units within CCRCs are counted by level of care. Many of the LZ 100 also provide government-subsidized (affordable) housing. Presentations of the data related to these organizations are provided in Charts 4-15a-c and in a dedicated listing for the LeadingAge Ziegler 100 Government-subsidized (Affordable) Housing Listing (Chapter 6).

**Communities (as of 12/31/11).** Over the years a number of terms have been used to describe a senior living property: site, location, facility, campus, community. A high rise on a limited acreage parcel doesn't fit the term "campus". A scattering of buildings, offering various levels of care, across extended acreage doesn't fit the term "facility". We believe the best all-encompassing word to use is "community". The communities examined are continuing care retirement communities (CCRC), independent living communities (IL), assisted living communities (AL), and nursing homes (NH). It is important to note that a single CCRC may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will generally contain at least independent living and nursing care<sup>2</sup>. The CCRC's resident payment plans may include entrance fee, condo/co-op and/or rental programs. Generally the majority of the CCRC's units are not NCB. The systems listed in the LZ 100 are ranked by totaling the communities owned by the system in these four key areas: CCRCs, IL, AL and NH.

**The Next 50.** The LZ 100 stops at the 100th largest not-for-profit system, leaving a number of senior living systems just beyond the list's cut-off. The "Next 50" is a listing of the next 50 systems tracked by Ziegler, sorted alphabetically within groups of 25 determined by size.

**The Next "Next 50".** The 50 systems beyond the Next 50 are also listed alphabetically within groups of 25 determined by size.

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<sup>2</sup> The definition of CCRC used by Ziegler in its 2009 *Ziegler National CCRC Listing & Profile* includes the qualifying factor that, at a minimum, a community must offer both independent living and nursing services. This may not be consistent with how organizations classify their communities for this LZ 100 research.

## Change at a Glance

Those new to the LZ 100 are provided in Chart 3-2a.

New to the LZ 100 in 2011 are three organizations: Christian Care Communities (KY), LZ 100 #97, Sunnyside Communities (VA), LZ 100 #99, and Western Home Communities (IA), LZ 100 #100. Details behind the addition of these organizations are provided with Chart 3-2a.

The organization with the greatest number of units added was Senior Quality Lifestyles Corporation (TX), LZ 100 #36, a position this organization holds for the first time since the inception of the data keeping for this listing. This organization added more than 500 units (predominantly ILUs) with the opening of two new CCRCs during 2011, The Stayton at Museum Way and Mirador. The organization with the greatest number of units removed was Springpoint Senior Living (LZ 100 #31). This organization disposed of four AL communities during 2011, lowering its market-rate unit total by over 300 units.

The organization with the greatest upward rank movement was also Senior Quality Lifestyles Corporation (TX), moving to 2012 LZ 100 #36 from 2011 LZ 100 #68. See further highlights of growth and change occurring in this organization in the case study in Chart 5-7.

In general, due to the size distribution of the listing, the lower on the listing a system is, the closer it is in number of units to the organizations above and below. Therefore, a relatively small change in number of units can make a large difference in rank. Similarly, those organizations highest in the ranking are separated from one another by hundreds, even thousands, of units and need a greater change in units to affect a change in rank.



### 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

#### 3-1a RANKED BY TOTAL SENIOR LIVING UNITS

#### PRIMARY RANKING

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,934	5,004	2,135	11,795	184	78	9	37	60
2	2	National Senior Campuses	MD	17,197	15,164	928	1,105	15	15	0	0	0
3	3	ACTS Retirement-Life Communities, Inc.	PA	8,130	5,799	885	1,446	23	23	0	0	0
4	4	Presbyterian Homes and Services	MN	6,342	3,192	1,773	1,377	36	11	21	2	2
5	5	Covenant Retirement Communities	IL	4,711	3,107	724	880	15	12	1	2	0
6	6	Retirement Housing Foundation	CA	4,289	2,639	1,000	650	19	9	8	2	0
7	7	Lifespace Communities, Inc.	IA	4,102	3,117	160	825	12	12	0	0	0
8	8	Westminster Communities of Florida	FL	3,209	1,994	464	751	10	8	2	0	0
9	10	Lutheran Senior Services	MO	3,203	1,579	717	907	11	9	0	1	1
10	17	The Kendal Corporation	PA	3,132	2,264	381	487	14	12	2	0	0
11	9	Presbyterian Senior Living	PA	3,119	1,368	499	1,252	20	12	5	2	1
12	11	Cornerstone Affiliates	CA	2,976	1,761	497	718	11	11	0	0	0
13	12	Pacific Retirement Services, Inc.	OR	2,878	2,141	307	430	9	8	1	0	0
14	13	Ohio Presbyterian Retirement Services	OH	2,805	1,540	507	758	11	9	2	0	0
15	15	Asbury Communities	MD	2,756	1,924	334	498	5	5	0	0	0
16	16	Christian Homes, Inc.	IL	2,707	677	280	1,750	14	13	0	0	1
17	21	Ecumen	MN	2,609	286	1,517	806	40	0	4	27	9
18	14	Front Porch	CA	2,551	1,570	442	539	10	8	2	0	0
19	18	Diakon Lutheran Social Ministries	PA	2,506	908	622	976	11	8	0	3	0
20	23	Presbyterian Manors of Mid-America	KS	2,493	886	557	1,050	18	16	0	1	1
21	19	Volunteers of America	VA	2,493	394	593	1,506	24	3	2	7	12
22	20	Franciscan Communities	IL	2,407	1,080	485	842	10	6	1	3	0
23	22	Masonic Villages	PA	2,306	1,377	260	669	5	3	1	1	0
24	24	Willow Valley Retirement Communities	PA	2,023	1,501	253	269	3	3	0	0	0
25	30	Providence Life Services	IL	1,979	808	472	699	11	1	5	1	4

## 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

### 3-1a RANKED BY TOTAL SENIOR LIVING UNITS

### PRIMARY RANKING

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	27	Augustana Care Corporation	MN	1,951	135	998	818	18	0	6	6	6
27	26	Shell Point	FL	1,937	1,337	272	328	2	2	0	0	0
28	28	Christian Care Companies	AZ	1,787	1,434	285	68	4	1	3	0	0
29	29	Elim Care	MN	1,719	264	440	1,015	19	1	2	7	9
30	31	Otterbein Senior Lifestyle Choices	OH	1,692	716	327	649	10	5	0	0	5
31	25	Springpoint Senior Living	NJ	1,691	1,245	179	267	5	5	0	0	0
32	34	be.group	CA	1,615	954	429	232	10	6	1	3	0
33	32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,601	259	628	714	8	1	2	4	1
34	33	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
35	35	Homewood Retirement Centers	MD	1,590	866	273	451	6	6	0	0	0
36	68	Senior Quality Lifestyles Corporation	TX	1,587	989	337	261	5	5	0	0	0
37	43	Eskaton	CA	1,549	515	608	426	13	1	3	6	3
38	41	National Church Residences	OH	1,542	706	373	463	7	4	0	2	1
39	37	Bethesda Health Group, Inc.	MO	1,522	627	34	861	8	2	4	0	2
40	42	Episcopal Senior Communities	CA	1,505	1,033	96	376	7	6	0	0	1
41	39	Holland Home	MI	1,485	723	501	261	4	2	0	1	1
42	36	Buckner Retirement Services, Inc.	TX	1,481	884	315	282	7	5	2	0	0
43	38	Presbyterian Homes	IL	1,475	862	231	382	4	4	0	0	0
44	44	Greencroft	IN	1,449	528	388	533	6	6	0	0	0
45	45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
46	52	Concordia Lutheran Ministries	PA	1,400	453	705	242	8	2	0	6	0
47	46	Mississippi Methodist Senior Services	MS	1,390	805	265	320	11	2	7	0	2
48	47	WesleyLife	IA	1,330	695	261	374	7	7	0	0	0
49	48	SantaFe Senior Living	FL	1,276	940	276	60	3	1	2	0	0
50	50	Lutheran Life Communities	IL	1,273	243	283	747	5	3	0	2	0

### 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

#### 3-1a RANKED BY TOTAL SENIOR LIVING UNITS

#### PRIMARY RANKING

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	59	Lutheran Services for the Aging	NC	1,270	257	281	732	8	1	1	1	5
52	49	Masonicare	CT	1,266	458	272	536	5	1	1	1	2
53	51	Baptist Village Retirement Communities of Oklahoma	OK	1,262	766	171	325	8	3	5	0	0
54	57	The Eddy	NY	1,230	499	313	418	8	5	0	1	2
55	54	Bethesda Senior Living Communities	CO	1,221	204	1,017	0	14	0	3	11	0
56	55	Virginia Baptist Homes	VA	1,217	770	227	220	4	4	0	0	0
57	56	Phoebe Ministries	PA	1,215	406	146	663	4	3	0	0	1
58	53	Virginia United Methodist Homes, Inc.	VA	1,212	627	328	257	7	6	0	1	0
59	64	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
60	58	Lutheran SeniorLife	PA	1,197	412	327	458	7	2	5	0	0
61	62	EMA, Inc.	MD	1,157	652	228	277	4	3	0	1	0
62	60	Lutheran Social Services of South Central Pennsylvania	PA	1,150	555	251	344	6	6	0	0	0
63	61	Sears Methodist Retirement System, Inc.	TX	1,135	531	138	466	6	5	0	0	1
64	65	Air Force Villages	TX	1,103	755	180	168	3	2	0	1	0
65	66	Northern California Presbyterian Homes and Services	CA	1,085	840	104	141	4	3	1	0	0
66	67	Presbyterian SeniorCare	PA	1,065	359	285	421	3	3	0	0	0
67	63	United Methodist Homes	NY	1,059	395	238	426	4	3	0	1	0
68	74	Presbyterian Villages of Michigan	MI	1,043	564	301	178	8	2	6	0	0
69	73	Lutheran Homes of South Carolina	SC	1,038	386	328	324	5	5	0	0	0
70	71	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
71	75	United Methodist Homes of New Jersey	NJ	1,028	88	688	252	5	1	0	4	0
72	76	Wesley Enhanced Living	PA	1,019	501	218	300	6	5	0	1	0
73	70	VMP	WI	1,016	574	205	237	3	2	1	0	0
74	77	Elant	NY	999	148	148	703	6	1	0	1	4
75	78	United Church Homes	OH	992	158	160	674	6	4	0	0	2

## 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

### 3-1a RANKED BY TOTAL SENIOR LIVING UNITS

### PRIMARY RANKING

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	79	Menno Haven	PA	959	569	177	213	3	2	1	0	0
77	72	Presby's Inspired Life	PA	959	477	222	260	4	2	1	0	1
78	80	The Presbyterian Homes, Inc. of North Carolina	NC	956	634	133	189	3	3	0	0	0
79	82	United Church Homes & Services	NC	939	520	91	328	4	3	0	0	1
80	83	United Methodist Retirement Homes, Inc.	NC	937	630	101	206	3	3	0	0	0
81	88	Methodist Retirement Communities and Affiliates	TX	918	314	180	424	5	4	0	0	1
82	94	Lutheran Homes of Michigan	MI	913	305	224	384	9	1	3	2	3
83	84	St. Ann's Community	NY	912	246	75	591	2	2	0	0	0
84	81	Christian Care Centers	TX	909	402	137	370	3	3	0	0	0
85	85	United Methodist Memorial Home	IN	909	181	469	259	3	2	0	1	0
86	98	Mather LifeWays	IL	899	622	46	231	5	2	2	0	1
87	86	Oakwood Lutheran Senior Ministries	WI	890	593	160	137	2	2	0	0	0
88	89	Cedar Community	WI	881	431	203	247	5	2	1	1	1
89	90	Presbyterian Communities and Services	TX	864	334	139	391	2	2	0	0	0
90	92	Simpson Senior Services	PA	858	494	172	192	3	3	0	0	0
91	95	Presbyterian Communities of South Carolina	SC	854	294	294	266	5	5	0	0	0
92	93	Goodwin House Incorporated	VA	845	597	99	149	2	2	0	0	0
93	87	Living Branches	PA	843	464	246	133	3	2	0	1	0
94	96	Garden Spot Village	PA	820	542	86	192	2	1	0	0	1
95	97	LutherCare	PA	812	473	128	211	3	1	1	0	1
96	99	Elder Care Alliance	CA	803	39	657	107	6	1	0	5	0
97	**NR	Christian Care Communities	KY	801	185	103	513	11	4	4	2	1
98	100	Morningside Ministries	TX	788	311	141	336	3	3	0	0	0
99	**NR	Sunnyside Communities	VA	782	524	124	134	3	3	0	0	0
100	**NR	Western Home Communities	IA	782	452	230	100	3	1	2	0	0

\*\* NR: Not Ranked in that year

IN ALL CHAPTER 4 & CHAPTER 5 CHARTS "2012 RANK" REFERS TO THE RANK LISTED UNDER 2012 RANK, ABOVE. When Total Senior Living Units are the same for two organizations they are then ranked by Independent Living Units, so the organization with the greater number of Independent Living Units receives the higher ranking (i.e. lower number).

### 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

#### 3-1b RANKED BY INDEPENDENT LIVING UNITS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	National Senior Campuses	MD	17,197	15,164	928	1,105	15	15	0	0	0
2	2	ACTS Retirement-Life Communities, Inc.	PA	8,130	5,799	885	1,446	23	23	0	0	0
3	3	Evangelical Lutheran Good Samaritan Society	SD	18,934	5,004	2,135	11,795	184	78	9	37	60
4	5	Presbyterian Homes and Services	MN	6,342	3,192	1,773	1,377	36	11	21	2	2
5	6	Lifespace Communities, Inc.	IA	4,102	3,117	160	825	12	12	0	0	0
6	4	Covenant Retirement Communities	IL	4,711	3,107	724	880	15	12	1	2	0
7	7	Retirement Housing Foundation	CA	4,289	2,639	1,000	650	19	9	8	2	0
8	11	The Kendal Corporation	PA	3,132	2,264	381	487	14	12	2	0	0
9	8	Pacific Retirement Services, Inc.	OR	2,878	2,141	307	430	9	8	1	0	0
10	9	Westminster Communities of Florida	FL	3,209	1,994	464	751	10	8	2	0	0
11	10	Asbury Communities	MD	2,756	1,924	334	498	5	5	0	0	0
12	12	Cornerstone Affiliates	CA	2,976	1,761	497	718	11	11	0	0	0
13	14	Lutheran Senior Services	MO	3,203	1,579	717	907	11	9	0	1	1
14	13	Front Porch	CA	2,551	1,570	442	539	10	8	2	0	0
15	15	Ohio Presbyterian Retirement Services	OH	2,805	1,540	507	758	11	9	2	0	0
16	16	Willow Valley Retirement Communities	PA	2,023	1,501	253	269	3	3	0	0	0
17	17	Christian Care Companies	AZ	1,787	1,434	285	68	4	1	3	0	0
18	21	Masonic Villages	PA	2,306	1,377	260	669	5	3	1	1	0
19	19	Presbyterian Senior Living	PA	3,119	1,368	499	1,252	20	12	5	2	1
20	18	Shell Point	FL	1,937	1,337	272	328	2	2	0	0	0
21	20	Springpoint Senior Living	NJ	1,691	1,245	179	267	5	5	0	0	0
22	22	Franciscan Communities	IL	2,407	1,080	485	842	10	6	1	3	0
23	23	Episcopal Senior Communities	CA	1,505	1,033	96	376	7	6	0	0	1
24	39	Senior Quality Lifestyles Corporation	TX	1,587	989	337	261	5	5	0	0	0
25	24	be.group	CA	1,615	954	429	232	10	6	1	3	0

## 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

### 3-1b RANKED BY INDEPENDENT LIVING UNITS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	26	SantaFe Senior Living	FL	1,276	940	276	60	3	1	2	0	0
27	25	Diakon Lutheran Social Ministries	PA	2,506	908	622	976	11	8	0	3	0
28	41	Presbyterian Manors of Mid-America	KS	2,493	886	557	1,050	18	16	0	1	1
29	27	Buckner Retirement Services, Inc.	TX	1,481	884	315	282	7	5	2	0	0
30	30	Homewood Retirement Centers	MD	1,590	866	273	451	6	6	0	0	0
31	28	Presbyterian Homes	IL	1,475	862	231	382	4	4	0	0	0
32	29	Northern California Presbyterian Homes and Services	CA	1,085	840	104	141	4	3	1	0	0
33	45	Providence Life Services	IL	1,979	808	472	699	11	1	5	1	4
34	31	Mississippi Methodist Senior Services	MS	1,390	805	265	320	11	2	7	0	2
35	32	Virginia Baptist Homes	VA	1,217	770	227	220	4	4	0	0	0
36	33	Baptist Village Retirement Communities of Oklahoma	OK	1,262	766	171	325	8	3	5	0	0
37	34	Air Force Villages	TX	1,103	755	180	168	3	2	0	1	0
38	35	Holland Home	MI	1,485	723	501	261	4	2	0	1	1
39	36	Otterbein Senior Lifestyle Choices	OH	1,692	716	327	649	10	5	0	0	5
40	40	National Church Residences	OH	1,542	706	373	463	7	4	0	2	1
41	37	WesleyLife	IA	1,330	695	261	374	7	7	0	0	0
42	38	Christian Homes, Inc.	IL	2,707	677	280	1,750	14	13	0	0	1
43	42	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
44	43	EMA, Inc.	MD	1,157	652	228	277	4	3	0	1	0
45	46	The Presbyterian Homes, Inc. of North Carolina	NC	956	634	133	189	3	3	0	0	0
46	48	United Methodist Retirement Homes, Inc.	NC	937	630	101	206	3	3	0	0	0
47	47	Bethesda Health Group, Inc.	MO	1,522	627	34	861	8	2	4	0	2
48	44	Virginia United Methodist Homes, Inc.	VA	1,212	627	328	257	7	6	0	1	0
49	57	Mather LifeWays	IL	899	622	46	231	5	2	2	0	1
50	49	Goodwin House Incorporated	VA	845	597	99	149	2	2	0	0	0



### 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

#### 3-1b RANKED BY INDEPENDENT LIVING UNITS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	51	Oakwood Lutheran Senior Ministries	WI	890	593	160	137	2	2	0	0	0
52	52	VMP	WI	1,016	574	205	237	3	2	1	0	0
53	53	Menno Haven	PA	959	569	177	213	3	2	1	0	0
54	50	Presbyterian Villages of Michigan	MI	1,043	564	301	178	8	2	6	0	0
55	54	Lutheran Social Services of South Central Pennsylvania	PA	1,150	555	251	344	6	6	0	0	0
56	55	Garden Spot Village	PA	820	542	86	192	2	1	0	0	1
57	73	Sears Methodist Retirement System, Inc.	TX	1,135	531	138	466	6	5	0	0	1
58	56	Greencroft	IN	1,449	528	388	533	6	6	0	0	0
59	**NR	Sunnyside Communities	VA	782	524	124	134	3	3	0	0	0
60	58	United Church Homes & Services	NC	939	520	91	328	4	3	0	0	1
61	59	Eskaton	CA	1,549	515	608	426	13	1	3	6	3
62	60	Wesley Enhanced Living	PA	1,019	501	218	300	6	5	0	1	0
63	61	The Eddy	NY	1,230	499	313	418	8	5	0	1	2
64	63	Simpson Senior Services	PA	858	494	172	192	3	3	0	0	0
65	64	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
66	66	Presby's Inspired Life	PA	959	477	222	260	4	2	1	0	1
67	65	LutherCare	PA	812	473	128	211	3	1	1	0	1
68	67	Living Branches	PA	843	464	246	133	3	2	0	1	0
69	68	Masonicare	CT	1,266	458	272	536	5	1	1	1	2
70	69	Concordia Lutheran Ministries	PA	1,400	453	705	242	8	2	0	6	0
71	**NR	Western Home Communities	IA	782	452	230	100	3	1	2	0	0
72	70	Cedar Community	WI	881	431	203	247	5	2	1	1	1
73	71	Lutheran SeniorLife	PA	1,197	412	327	458	7	2	5	0	0
74	72	Phoebe Ministries	PA	1,215	406	146	663	4	3	0	0	1
75	74	Christian Care Centers	TX	909	402	137	370	3	3	0	0	0

## 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

### 3-1b RANKED BY INDEPENDENT LIVING UNITS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	75	United Methodist Homes	NY	1,059	395	238	426	4	3	0	1	0
77	76	Volunteers of America	VA	2,493	394	593	1,506	24	3	2	7	12
78	77	Lutheran Homes of South Carolina	SC	1,038	386	328	324	5	5	0	0	0
79	78	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
80	79	Presbyterian SeniorCare	PA	1,065	359	285	421	3	3	0	0	0
81	81	Presbyterian Communities and Services	TX	864	334	139	391	2	2	0	0	0
82	82	Methodist Retirement Communities and Affiliates	TX	918	314	180	424	5	4	0	0	1
83	83	Morningside Ministries	TX	788	311	141	336	3	3	0	0	0
84	91	Lutheran Homes of Michigan	MI	913	305	224	384	9	1	3	2	3
85	85	Presbyterian Communities of South Carolina	SC	854	294	294	266	5	5	0	0	0
86	86	Ecumen	MN	2,609	286	1,517	806	40	0	4	27	9
87	87	Elim Care	MN	1,719	264	440	1,015	19	1	2	7	9
88	88	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,601	259	628	714	8	1	2	4	1
89	89	Lutheran Services for the Aging	NC	1,270	257	281	732	8	1	1	1	5
90	90	St. Ann's Community	NY	912	246	75	591	2	2	0	0	0
91	94	Lutheran Life Communities	IL	1,273	243	283	747	5	3	0	2	0
92	92	Bethesda Senior Living Communities	CO	1,221	204	1,017	0	14	0	3	11	0
93	**NR	Christian Care Communities	KY	801	185	103	513	11	4	4	2	1
94	95	United Methodist Memorial Home	IN	909	181	469	259	3	2	0	1	0
95	96	United Church Homes	OH	992	158	160	674	6	4	0	0	2
96	97	Elant	NY	999	148	148	703	6	1	0	1	4
97	62	Augustana Care Corporation	MN	1,951	135	998	818	18	0	6	6	6
98	98	United Methodist Homes of New Jersey	NJ	1,028	88	688	252	5	1	0	4	0
99	99	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
100	100	Elder Care Alliance	CA	803	39	657	107	6	1	0	5	0

\*\* NR: Not Ranked in that year

### 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

#### 3-1c RANKED BY ASSISTED LIVING UNITS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,934	5,004	2,135	11,795	184	78	9	37	60
2	2	Presbyterian Homes and Services	MN	6,342	3,192	1,773	1,377	36	11	21	2	2
3	3	Ecumen	MN	2,609	286	1,517	806	40	0	4	27	9
4	4	Bethesda Senior Living Communities	CO	1,221	204	1,017	0	14	0	3	11	0
5	6	Retirement Housing Foundation	CA	4,289	2,639	1,000	650	19	9	8	2	0
6	16	Augustana Care Corporation	MN	1,951	135	998	818	18	0	6	6	6
7	5	National Senior Campuses	MD	17,197	15,164	928	1,105	15	15	0	0	0
8	7	ACTS Retirement-Life Communities, Inc.	PA	8,130	5,799	885	1,446	23	23	0	0	0
9	10	Covenant Retirement Communities	IL	4,711	3,107	724	880	15	12	1	2	0
10	8	Lutheran Senior Services	MO	3,203	1,579	717	907	11	9	0	1	1
11	15	Concordia Lutheran Ministries	PA	1,400	453	705	242	8	2	0	6	0
12	9	United Methodist Homes of New Jersey	NJ	1,028	88	688	252	5	1	0	4	0
13	11	Elder Care Alliance	CA	803	39	657	107	6	1	0	5	0
14	12	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,601	259	628	714	8	1	2	4	1
15	13	Diakon Lutheran Social Ministries	PA	2,506	908	622	976	11	8	0	3	0
16	21	Eskaton	CA	1,549	515	608	426	13	1	3	6	3
17	14	Volunteers of America	VA	2,493	394	593	1,506	24	3	2	7	12
18	18	Presbyterian Manors of Mid-America	KS	2,493	886	557	1,050	18	16	0	1	1
19	19	Ohio Presbyterian Retirement Services	OH	2,805	1,540	507	758	11	9	2	0	0
20	22	Holland Home	MI	1,485	723	501	261	4	2	0	1	1
21	20	Presbyterian Senior Living	PA	3,119	1,368	499	1,252	20	12	5	2	1
22	28	Cornerstone Affiliates	CA	2,976	1,761	497	718	11	11	0	0	0
23	24	Franciscan Communities	IL	2,407	1,080	485	842	10	6	1	3	0
24	31	Providence Life Services	IL	1,979	808	472	699	11	1	5	1	4
25	26	United Methodist Memorial Home	IN	909	181	469	259	3	2	0	1	0

## 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

### 3-1c RANKED BY ASSISTED LIVING UNITS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	27	Westminster Communities of Florida	FL	3,209	1,994	464	751	10	8	2	0	0
27	17	Front Porch	CA	2,551	1,570	442	539	10	8	2	0	0
28	29	Elim Care	MN	1,719	264	440	1,015	19	1	2	7	9
29	30	be.group	CA	1,615	954	429	232	10	6	1	3	0
30	32	Greencroft <sup>B</sup>	IN	1,449	528	388	533	6	6	0	0	0
31	40	The Kendal Corporation	PA	3,132	2,264	381	487	14	12	2	0	0
32	34	National Church Residences	OH	1,542	706	373	463	7	4	0	2	1
33	68	Senior Quality Lifestyles Corporation	TX	1,587	989	337	261	5	5	0	0	0
34	36	Asbury Communities	MD	2,756	1,924	334	498	5	5	0	0	0
35	42	Virginia United Methodist Homes, Inc.	VA	1,212	627	328	257	7	6	0	1	0
36	39	Lutheran Homes of South Carolina	SC	1,038	386	328	324	5	5	0	0	0
37	37	Otterbein Senior Lifestyle Choices	OH	1,692	716	327	649	10	5	0	0	5
38	38	Lutheran SeniorLife	PA	1,197	412	327	458	7	2	5	0	0
39	33	Buckner Retirement Services, Inc.	TX	1,481	884	315	282	7	5	2	0	0
40	41	The Eddy	NY	1,230	499	313	418	8	5	0	1	2
41	43	Pacific Retirement Services, Inc.	OR	2,878	2,141	307	430	9	8	1	0	0
42	60	Presbyterian Villages of Michigan	MI	1,043	564	301	178	8	2	6	0	0
43	44	Presbyterian Communities of South Carolina	SC	854	294	294	266	5	5	0	0	0
44	49	Christian Care Companies	AZ	1,787	1,434	285	68	4	1	3	0	0
45	47	Presbyterian SeniorCare	PA	1,065	359	285	421	3	3	0	0	0
46	57	Lutheran Life Communities	IL	1,273	243	283	747	5	3	0	2	0
47	48	Lutheran Services for the Aging	NC	1,270	257	281	732	8	1	1	1	5
48	50	Christian Homes, Inc.	IL	2,707	677	280	1,750	14	13	0	0	1
49	51	SantaFe Senior Living	FL	1,276	940	276	60	3	1	2	0	0
50	46	Homewood Retirement Centers	MD	1,590	866	273	451	6	6	0	0	0

## 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

### 3-1c RANKED BY ASSISTED LIVING UNITS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	52	Shell Point	FL	1,937	1,337	272	328	2	2	0	0	0
52	53	Masonicare	CT	1,266	458	272	536	5	1	1	1	2
53	54	Mississippi Methodist Senior Services	MS	1,390	805	265	320	11	2	7	0	2
54	56	WesleyLife <sup>B</sup>	IA	1,330	695	261	374	7	7	0	0	0
55	25	Masonic Villages <sup>A</sup>	PA	2,306	1,377	260	669	5	3	1	1	0
56	59	Willow Valley Retirement Communities	PA	2,023	1,501	253	269	3	3	0	0	0
57	55	Lutheran Social Services of South Central Pennsylvania	PA	1,150	555	251	344	6	6	0	0	0
58	45	Living Branches	PA	843	464	246	133	3	2	0	1	0
59	61	United Methodist Homes	NY	1,059	395	238	426	4	3	0	1	0
60	63	Presbyterian Homes	IL	1,475	862	231	382	4	4	0	0	0
61	**NR	Western Home Communities	IA	782	452	230	100	3	1	2	0	0
62	65	EMA, Inc.	MD	1,157	652	228	277	4	3	0	1	0
63	66	Virginia Baptist Homes	VA	1,217	770	227	220	4	4	0	0	0
64	58	Lutheran Homes of Michigan	MI	913	305	224	384	9	1	3	2	3
65	64	Presby's Inspired Life	PA	959	477	222	260	4	2	1	0	1
66	67	Wesley Enhanced Living	PA	1,019	501	218	300	6	5	0	1	0
67	77	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
68	62	VMP	WI	1,016	574	205	237	3	2	1	0	0
69	69	Cedar Community	WI	881	431	203	247	5	2	1	1	1
70	70	Air Force Villages	TX	1,103	755	180	168	3	2	0	1	0
71	86	Methodist Retirement Communities and Affiliates	TX	918	314	180	424	5	4	0	0	1
72	23	Springpoint Senior Living <sup>B</sup>	NJ	1,691	1,245	179	267	5	5	0	0	0
73	71	Menno Haven	PA	959	569	177	213	3	2	1	0	0
74	72	Simpson Senior Services	PA	858	494	172	192	3	3	0	0	0
75	73	Baptist Village Retirement Communities of Oklahoma	OK	1,262	766	171	325	8	3	5	0	0

## 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

### 3-1c RANKED BY ASSISTED LIVING UNITS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	74	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
77	91	Lifespace Communities, Inc.	IA	4,102	3,117	160	825	12	12	0	0	0
78	76	United Church Homes	OH	992	158	160	674	6	4	0	0	2
79	75	Oakwood Lutheran Senior Ministries	WI	890	593	160	137	2	2	0	0	0
80	78	Elant	NY	999	148	148	703	6	1	0	1	4
81	79	Phoebe Ministries <sup>A</sup>	PA	1,215	406	146	663	4	3	0	0	1
82	80	Morningside Ministries	TX	788	311	141	336	3	3	0	0	0
83	82	Presbyterian Communities and Services	TX	864	334	139	391	2	2	0	0	0
84	96	Sears Methodist Retirement System, Inc.	TX	1,135	531	138	466	6	5	0	0	1
85	81	Christian Care Centers	TX	909	402	137	370	3	3	0	0	0
86	83	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
87	84	The Presbyterian Homes, Inc. of North Carolina	NC	956	634	133	189	3	3	0	0	0
88	85	LutherCare	PA	812	473	128	211	3	1	1	0	1
89	**NR	Sunnyside Communities	VA	782	524	124	134	3	3	0	0	0
90	87	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
91	88	Northern California Presbyterian Homes and Services	CA	1,085	840	104	141	4	3	1	0	0
92	**NR	Christian Care Communities	KY	801	185	103	513	11	4	4	2	1
93	89	United Methodist Retirement Homes, Inc.	NC	937	630	101	206	3	3	0	0	0
94	92	Goodwin House Incorporated	VA	845	597	99	149	2	2	0	0	0
95	94	Episcopal Senior Communities	CA	1,505	1,033	96	376	7	6	0	0	1
96	93	United Church Homes & Services	NC	939	520	91	328	4	3	0	0	1
97	95	Garden Spot Village	PA	820	542	86	192	2	1	0	0	1
98	97	St. Ann's Community	NY	912	246	75	591	2	2	0	0	0
99	98	Mather LifeWays	IL	899	622	46	231	5	2	2	0	1
100	99	Bethesda Health Group, Inc.	MO	1,522	627	34	861	8	2	4	0	2

<sup>A</sup>All ALUs are designated as Personal/Residential Care Units

<sup>B</sup>Some ALUs are designated as Personal/Residential Care Units

\*\*NR: Not Ranked in that year



### 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

#### 3-1d RANKED BY NURSING CARE BEDS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,934	5,004	2,135	11,795	184	78	9	37	60
2	2	Christian Homes, Inc.	IL	2,707	677	280	1,750	14	13	0	0	1
3	3	Volunteers of America	VA	2,493	394	593	1,506	24	3	2	7	12
4	4	ACTS Retirement-Life Communities, Inc.	PA	8,130	5,799	885	1,446	23	23	0	0	0
5	5	Presbyterian Homes and Services	MN	6,342	3,192	1,773	1,377	36	11	21	2	2
6	6	Presbyterian Senior Living	PA	3,119	1,368	499	1,252	20	12	5	2	1
7	7	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
8	8	National Senior Campuses	MD	17,197	15,164	928	1,105	15	15	0	0	0
9	10	Presbyterian Manors of Mid-America	KS	2,493	886	557	1,050	18	16	0	1	1
10	9	Elim Care	MN	1,719	264	440	1,015	19	1	2	7	9
11	11	Diakon Lutheran Social Ministries	PA	2,506	908	622	976	11	8	0	3	0
12	17	Lutheran Senior Services	MO	3,203	1,579	717	907	11	9	0	1	1
13	12	Covenant Retirement Communities	IL	4,711	3,107	724	880	15	12	1	2	0
14	14	Bethesda Health Group, Inc.	MO	1,522	627	34	861	8	2	4	0	2
15	15	Franciscan Communities	IL	2,407	1,080	485	842	10	6	1	3	0
16	27	Lifespace Communities, Inc.	IA	4,102	3,117	160	825	12	12	0	0	0
17	16	Augustana Care Corporation	MN	1,951	135	998	818	18	0	6	6	6
18	19	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
19	21	Ecumen	MN	2,609	286	1,517	806	40	0	4	27	9
20	22	Ohio Presbyterian Retirement Services	OH	2,805	1,540	507	758	11	9	2	0	0
21	23	Westminster Communities of Florida	FL	3,209	1,994	464	751	10	8	2	0	0
22	18	Lutheran Life Communities	IL	1,273	243	283	747	5	3	0	2	0
23	34	Lutheran Services for the Aging	NC	1,270	257	281	732	8	1	1	1	5
24	24	Cornerstone Affiliates	CA	2,976	1,761	497	718	11	11	0	0	0
25	25	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,601	259	628	714	8	1	2	4	1

## 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

### 3-1d RANKED BY NURSING CARE BEDS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	26	Elant	NY	999	148	148	703	6	1	0	1	4
27	32	Providence Life Services	IL	1,979	808	472	699	11	1	5	1	4
28	28	United Church Homes	OH	992	158	160	674	6	4	0	0	2
29	30	Masonic Villages	PA	2,306	1,377	260	669	5	3	1	1	0
30	31	Phoebe Ministries	PA	1,215	406	146	663	4	3	0	0	1
31	36	Retirement Housing Foundation	CA	4,289	2,639	1,000	650	19	9	8	2	0
32	33	Otterbein Senior Lifestyle Choices	OH	1,692	716	327	649	10	5	0	0	5
33	35	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
34	37	St. Ann's Community	NY	912	246	75	591	2	2	0	0	0
35	38	Front Porch	CA	2,551	1,570	442	539	10	8	2	0	0
36	40	Masonicare	CT	1,266	458	272	536	5	1	1	1	2
37	39	Greencroft	IN	1,449	528	388	533	6	6	0	0	0
38	**NR	Christian Care Communities	KY	801	185	103	513	11	4	4	2	1
39	42	Asbury Communities	MD	2,756	1,924	334	498	5	5	0	0	0
40	47	The Kendal Corporation	PA	3,132	2,264	381	487	14	12	2	0	0
41	29	Sears Methodist Retirement System, Inc.	TX	1,135	531	138	466	6	5	0	0	1
42	43	National Church Residences	OH	1,542	706	373	463	7	4	0	2	1
43	45	Lutheran SeniorLife	PA	1,197	412	327	458	7	2	5	0	0
44	46	Homewood Retirement Centers	MD	1,590	866	273	451	6	6	0	0	0
45	48	Pacific Retirement Services, Inc.	OR	2,878	2,141	307	430	9	8	1	0	0
46	49	Eskaton	CA	1,549	515	608	426	13	1	3	6	3
47	41	United Methodist Homes	NY	1,059	395	238	426	4	3	0	1	0
48	50	Methodist Retirement Communities and Affiliates	TX	918	314	180	424	5	4	0	0	1
49	51	Presbyterian SeniorCare	PA	1,065	359	285	421	3	3	0	0	0
50	53	The Eddy	NY	1,230	499	313	418	8	5	0	1	2

### 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

#### 3-1d RANKED BY NURSING CARE BEDS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	54	Presbyterian Communities and Services	TX	864	334	139	391	2	2	0	0	0
52	59	Lutheran Homes of Michigan	MI	913	305	224	384	9	1	3	2	3
53	55	Presbyterian Homes	IL	1,475	862	231	382	4	4	0	0	0
54	57	Episcopal Senior Communities	CA	1,505	1033	96	376	7	6	0	0	1
55	56	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
56	58	WesleyLife	IA	1,330	695	261	374	7	7	0	0	0
57	52	Christian Care Centers	TX	909	402	137	370	3	3	0	0	0
58	60	Lutheran Social Services of South Central Pennsylvania	PA	1,150	555	251	344	6	6	0	0	0
59	61	Morningside Ministries	TX	788	311	141	336	3	3	0	0	0
60	62	Shell Point	FL	1,937	1,337	272	328	2	2	0	0	0
61	63	United Church Homes & Services	NC	939	520	91	328	4	3	0	0	1
62	65	Baptist Village Retirement Communities of Oklahoma	OK	1,262	766	171	325	8	3	5	0	0
63	66	Lutheran Homes of South Carolina	SC	1,038	386	328	324	5	5	0	0	0
64	67	Mississippi Methodist Senior Services	MS	1,390	805	265	320	11	2	7	0	2
65	69	Wesley Enhanced Living	PA	1,019	501	218	300	6	5	0	1	0
66	70	Buckner Retirement Services, Inc.	TX	1,481	884	315	282	7	5	2	0	0
67	71	EMA, Inc.	MD	1,157	652	228	277	4	3	0	1	0
68	72	Willow Valley Retirement Communities	PA	2,023	1,501	253	269	3	3	0	0	0
69	68	Springpoint Senior Living	NJ	1,691	1,245	179	267	5	5	0	0	0
70	79	Presbyterian Communities of South Carolina	SC	854	294	294	266	5	5	0	0	0
71	91	Senior Quality Lifestyles Corporation	TX	1,587	989	337	261	5	5	0	0	0
72	73	Holland Home	MI	1,485	723	501	261	4	2	0	1	1
73	64	Presby's Inspired Life	PA	959	477	222	260	4	2	1	0	1
74	75	United Methodist Memorial Home	IN	909	181	469	259	3	2	0	1	0
75	74	Virginia United Methodist Homes, Inc.	VA	1,212	627	328	257	7	6	0	1	0

## 3-1 2012 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

### 3-1d RANKED BY NURSING CARE BEDS

2012 Rank	2011 Rank	System Name	State	Units (as of 12/31/11)				Communities (as of 12/31/11)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	76	United Methodist Homes of New Jersey	NJ	1,028	88	688	252	5	1	0	4	0
77	77	Cedar Community	WI	881	431	203	247	5	2	1	1	1
78	78	Concordia Lutheran Ministries	PA	1,400	453	705	242	8	2	0	6	0
79	82	VMP	WI	1,016	574	205	237	3	2	1	0	0
80	80	be.group	CA	1,615	954	429	232	10	6	1	3	0
81	81	Mather LifeWays	IL	899	622	46	231	5	2	2	0	1
82	83	Virginia Baptist Homes	VA	1,217	770	227	220	4	4	0	0	0
83	84	Menno Haven	PA	959	569	177	213	3	2	1	0	0
84	85	LutherCare	PA	812	473	128	211	3	1	1	0	1
85	86	United Methodist Retirement Homes, Inc.	NC	937	630	101	206	3	3	0	0	0
86	87	Simpson Senior Services	PA	858	494	172	192	3	3	0	0	0
87	88	Garden Spot Village	PA	820	542	86	192	2	1	0	0	1
88	89	The Presbyterian Homes, Inc. of North Carolina	NC	956	634	133	189	3	3	0	0	0
89	90	Presbyterian Villages of Michigan	MI	1,043	564	301	178	8	2	6	0	0
90	92	Air Force Villages	TX	1,103	755	180	168	3	2	0	1	0
91	93	Goodwin House Incorporated	VA	845	597	99	149	2	2	0	0	0
92	94	Northern California Presbyterian Homes and Services	CA	1,085	840	104	141	4	3	1	0	0
93	95	Oakwood Lutheran Senior Ministries	WI	890	593	160	137	2	2	0	0	0
94	**NR	Sunnyside Communities	VA	782	524	124	134	3	3	0	0	0
95	96	Living Branches	PA	843	464	246	133	3	2	0	1	0
96	97	Elder Care Alliance	CA	803	39	657	107	6	1	0	5	0
97	**NR	Western Home Communities	IA	782	452	230	100	3	1	2	0	0
98	98	Christian Care Companies	AZ	1,787	1,434	285	68	4	1	3	0	0
99	99	SantaFe Senior Living	FL	1,276	940	276	60	3	1	2	0	0
100	100	Bethesda Senior Living Communities	CO	1,221	204	1,017	0	14	0	3	11	0

\*\* NR: Not Ranked in that year

## 3-1 2012 LeadingAge Ziegler 100

### The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

#### 3-1e THE NEXT 50

The LZ 100 stops at the 100th largest system, leaving a number of senior living systems just beyond the list's cut-off. No 2012 submission was received for organizations noted with a '\*'.

##### First 25 (621 to 778 Total Units)

Albright Care Services (PA)\*  
Baptist Retirement Homes of North Carolina, Inc. (NC)\*  
BHI Senior Living (IN)\*  
Christian Living Communities (CO)  
CRISTA Senior Ministries (WA)  
Deaconess Abundant Life Communities (MA)  
Eventide Senior Living Communities (MN)  
Liberty Lutheran Services (PA)\*  
Life Enriching Communities (OH)\*  
LifeStream Complete Senior Living (AZ)  
LindenGrove (WI)  
Loomis Communities (MA)  
Luther Manor (WI)  
Lutheran Homes Society (OH)\*  
Lutheran Social Ministries of New Jersey (NJ)  
Lutheran Social Services of Michigan (MI)  
Maple Knoll Communities (OH)  
Messiah Lifeways (PA)  
The Ohio Masonic Home (OH)  
St. Therese Homes, Inc. (MN)  
Sunset Retirement Communities and Services (MI)  
United Church of Christ Homes (PA)  
United Methodist Homes (CT)\*  
Vincentian Collaborative System (PA)\*  
Wesley Homes (WA)

##### Second 25 (507 to 596 Total Units)

Asbury Place (TN)  
Baptist Homes Society (PA)  
Baptist Life Communities (KY)  
Cadbury Senior Services (NJ)  
Church Homes Inc. (CT)\*  
Friends Homes, Inc. (NC)  
Heritage Ministries (NY)  
Life Care Pastoral Services (FL)  
The Lutheran Care Network (NY)\*  
The Lutheran Home Association (MN)\*  
Lutheran Life Villages (IN)  
Lutheran Social Services of The South (TX)\*  
Masonic Homes of California (CA)\*  
Masonic Homes of Kentucky (KY)\*  
Mercy Community Health (CT)  
New Hampshire Catholic Charities (NH)\*  
Niagara Lutheran Health System (NY)  
Porter Hills Retirement Communities & Services (MI)  
Presbyterian Homes of Georgia (GA)\*  
Presbyterian Retirement Communities Northwest (WA)\*  
The RiverWoods Company (NH)  
Sholom Community Alliance (MN)\*  
Smith Senior Living (IL)  
St. John's Lutheran Ministries (MT)  
Waterman Village (FL)\*

### 3-1 2012 LeadingAge Ziegler 100

#### The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

##### 3-1f THE NEXT "NEXT" 50

The universe of multi-site senior living systems includes many smaller systems. Listed alphabetically below are those beyond the 150 systems already listed. No 2012 submission was received for organizations noted with a '\*'.

##### First 25 (390 to 500 Total Units)

Allegheny Lutheran Social Ministries (PA)  
 Beechwood Continuing Care (NY)  
 Brazos Presbyterian Homes (TX)\*  
 Brooke Grove Foundation (MD)\*  
 CJE SeniorLife (IL)  
 Clark Retirement Communities (MI)\*  
 Eliza Jennings Senior Care Network (OH)\*  
 Evangelical Homes of Michigan (MI)  
 Judson Services, Inc. (OH)\*  
 Lutheran Living Services (WI)  
 Lutheran Social Services of Illinois (IL)  
 Midwest Geriatrics, Inc. (NE)\*  
 Milwaukee Protestant Home (WI)  
 National Lutheran Communities & Services (MD)  
 Presbyterian Homes & Services (NY)  
 Presbyterian Homes and Services of Kentucky (KY)\*  
 Redstone Presbyterian SeniorCare (PA)\*  
 Rockwood Retirement Communities (WA)\*  
 South Carolina Baptist Ministries for the Aging (SC)\*  
 United Methodist Retirement Communities (MI)  
 United Methodist Services for the Aging (PA)\*  
 Valley View Haven, Inc. (PA)  
 Wesbury United Methodist Retirement Community (PA)\*  
 Wesleyan Senior Living (OH)  
 Willow Brook Christian Communities (OH)

##### Second 25 (260 to 387 Total Units)

Appalachian Christian Village (TN)  
 Bethesda Health & Housing (MN)\*  
 California-Nevada Methodist Homes (CA)\*  
 Colonial Senior Services (OH)  
 Crest View Senior Communities (MN)\*  
 Episcopal Communities and Services (CA)  
 Episcopal Retirement Homes Inc. (OH)  
 Episcopal SeniorLife Communities (NY)\*  
 The Glen Retirement System (LA)  
 Good Shepherd Communities (NY)\*  
 Homme, Inc. (WI)\*  
 Jewish Senior Life of Metropolitan Detroit (MI)\*  
 Lincoln Lutheran (WI)\*  
 Lutheran Homes of Oshkosh (WI)  
 Lutheran Social Services of Central Ohio (OH)  
 Lyngblomsten (MN)\*  
 Madrid Home Communities (IA)\*  
 Northfield Retirement Communities (NE)  
 Presbyterian Homes of Lake Erie (PA)  
 Presbyterian Senior Care of Western New York (NY)\*  
 Resthaven Patrons (MI)  
 Saint Elizabeth Community (RI)\*  
 Three Pillars Senior Living Communities (WI)  
 Wesley Woods Senior Living (GA)  
 WRC Senior Services (PA)



## 3-2 2012 LeadingAge Ziegler 100

### The Rankings: Change at a Glance

#### 3-2a WHO MOVED ON?

New to 2012 Ranking		2012 Rank
Christian Care Communities	KY	97
Sunnyside Communities	VA	99
Western Home Communities	IA	100

**Christian Care Communities** moved back on the list after a two-year absence, primarily due to the opening of Christian Health Center West, a nursing center.

**Sunnyside Communities** makes its first appearance in the LZ 100 Primary Ranking after being very near the cut-off for several years. Despite no change in its units in 2011, the reduction of units in other systems has moved them onto the listing.

**Western Home Communities** also makes its first appearance in the LZ 100, as a result of an increase in ILUs from the building of independent living cottages over the past few years.

#### 3-2b GREATEST CHANGES IN UNITS

Greatest Increase and Decrease		YE 2011 Units	YE 2010 Units	Change
<b>Greatest Increase</b>				
Senior Quality Lifestyles Corporation	TX	1,587	1,063	+ 524
The Kendal Corporation	PA	3,132	2,649	+ 483
Lifespace Communities, Inc.	IA	4,102	3,639	+ 463
Providence Life Services	IL	1,979	1,693	+ 286
<b>Greatest Decrease</b>				
Springpoint Senior Living	NJ	1,691	2,011	- 320
Front Porch	CA	2,551	2,740	- 189
ACTS Retirement-Life Communities, Inc.	PA	8,130	8,278	- 148
United Methodist Homes	NY	1,059	1,152	- 93

## 3-2 2012 LeadingAge Ziegler 100

The Rankings: Change at a Glance

### 3-2c GREATEST CHANGES IN RANK

Greatest Upward and Downward Change		2012 Rank	2011 Rank	Change
<b>Greatest Upward Movement</b>				
Senior Quality Lifestyles Corporation	TX	36	68	+ 32
Mather LifeWays	IL	86	98	+ 12
Lutheran Homes of Michigan	MI	82	94	+ 12
Lutheran Services for the Aging	NC	51	59	+ 8
Christian Care Communities	KY	97	NR*	--
Sunnyside Communities	VA	99	NR*	--
Western Home Communities	IA	100	NR*	--
<b>Greatest Downward Movement</b>				
Springpoint Senior Living	NJ	31	25	- 6
Buckner Retirement Services, Inc.	TX	42	36	- 6
Living Branches	PA	93	87	- 6
Presbyterian Homes	IL	43	38	- 5
Virginia United Methodist Homes, Inc.	VA	58	53	- 5
Presby's Inspired Life	PA	77	72	- 5

\*NR: Not Ranked in that year

# Chapter 4

## Analysis of the Data

The LeadingAge Ziegler 100 are examined through a number of categories: total units, total communities, geographic coverage, location, ratings, accreditation, number of employees, affiliations, number of residents, founding dates, provision of government-subsidized (affordable) housing, and the provision of home and community-based services. Each area is discussed below. To fully understand the analyses that follow, the following concepts may be helpful:

- Total units are composed of independent living units (ILU), assisted living units (ALU) and nursing care beds (NCB) - including Medicare- and Medicaid-certified units.
- Only not-for-profit LeadingAge member organizations are on the list, and all multi-site organizations are considered for inclusion unless predominantly a health care system (such as Catholic Health East) or unless nearly all of the system's units are nursing (such as Jewish Home Lifecare, with NCBs composing 100 percent of its market-rate unit mix).
- The number of government-subsidized (affordable housing) units is excluded from the count that determines whether an organization is listed.
- The LZ 100 is ranked by total units owned and operated by the system (managed units that are not owned are excluded for purposes of the **Primary Ranking** and are presented in Charts 4-16a-c). The 2012 LZ 100 publication's breakdown of the data begins with a parallel set of analyses, examining first a comparison of the unit mix between 2011 and 2010 for each of the organizations, then examining the community mix.

## Units

The first analysis of the 2012 LZ 100 provides a side-by-side comparison of the unit mix for 2011 compared to 2010 for each of the organizations. The 2012 LZ 100 organizations own nearly 201,000 market-rate senior living units. By breaking the data into the largest 10, 25 and 50 (Charts 4-1b-c), one sees that the ratio of units held by the largest 50 compared with the percentage of total units in the LZ 100 is not balanced, e.g., the largest 50 systems hold more than 50 percent of the total units, in fact, 75 percent of the total. The 10 largest systems own 36 percent of the total LZ 100 units. Closer examination of the data shows that ILUs are a driving factor in building the size of a system. Approximately 51 percent of the average system's total units are ILUs, with 18 percent composed of ALUs, and approximately 31 percent composed of NCBs. More than 50 percent of the 2012 LZ 100's total communities are CCRCs, with the remaining nearly 50 percent nearly evenly divided between stand-alone ILs, ALs, and NHs.

The largest multi-site on the 2012 LZ 100 **Primary Ranking** (Chart 3-1a) is Evangelical Lutheran Good Samaritan Society (ELGSS), an organization with a unit mix significantly different from the average for the LZ 100 (Chart 4-1b); nearly two-thirds of this multi-site's units are nursing care beds. When the unit mix of ELGSS is removed from the combined unit mix of the largest 10, the proportion of nursing beds in this largest 10 group decreases from nearly 30 to 15 percent of the total mix and the proportion of ILUs increases from approximately 60 to 72 percent, accentuating the prominence of ILUs among the largest of the LZ 100 multi-sites. When ELGSS is removed from the community mix of the largest 10 providers, nursing homes as a percentage of community type declines from nearly 20 percent to two percent. The percentage of CCRCs increases from approximately 56 percent to 72 percent. ELGSS is apparently taking steps to realign its unit mix; since 2006, the organization has disposed of seventeen (17) nursing homes and continued to dispose of nursing units in 2011.

The average system within the 2012 LZ 100 had nearly 2,008 units in 2011, as compared to 1,990 units in 2010 and 1,976 units in 2009 (Chart 4-1b). Nearly 30 percent of the 2012 LZ 100 reported a net reduction in the number of units between 2011 and 2010, a slight increase from 25 percent last year. Additionally, 28 reported no net change in the number of units between 2011 and 2010.

**Summary of Not-for-Profit Units.** These columns show the total number of units, followed by a breakdown of this total by level of care, for each of the systems. The first set of columns show the unit mix as of 12/31/11. The second set of columns show the unit mix as of 12/31/10.

**Change in Total Units from 2009 to 2010.** This column provides the change in the listed organization's TOTAL units (all levels of care) between year-end 2011 and year-end 2010.

Chart 4-1b provides two examinations of three-year comparisons of the LZ 100 organizations. The first half of the chart examines the unit mix between each of the three years' LZ 100 listings (e.g., the unit mix of the 2010 LZ 100 compared to the unit mix of the 2011 LZ 100, compared to the unit mix of the 2012 LZ 100). The latter half of the chart examines the 2012 LZ 100 for each of these periods ("same-store" analysis). Charts 4-1d-h provides a more graphic illustration of the type of change occurring in the LZ 100. For example, note in Chart 4-1h the relatively static number of NCBs within the systems, while both ILUs and ALUs have average annual growth rates of approximately 4 percent for the past ten years.

## Communities

The unit analysis of the 2012 LZ 100 presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2012 LZ 100 for 2011 compared to their portfolios in 2010.

**Summary of Not-for-profit Communities.** Community, as noted earlier, is the term used to refer to any type of community owned by the LZ 100, whether stand-alone nursing home (NH), assisted living community (AL), independent living community (IL), or CCRC. Again, government-subsidized (affordable) housing properties are excluded from the count of communities shown for the LZ 100 (these properties are examined in Charts 4-15a-c and in Chapter 6). The first set of columns in Chart 4-2a show the communities owned, by type, as of 12/31/11. The second set of columns show the communities owned, by type, as of 12/31/10. The 2012 LZ 100 own 973 total communities, an increase of 12 communities over the 2011 LZ 100. The breakdown of data by communities (Charts 4-2a-h) illustrates an outcome similar to that of the units' data (Charts 4-1a-h): the largest 50 in the LZ 100 own nearly 75 percent of all communities. CCRCs comprise the greatest proportion of communities owned. More than 50 percent of the portfolio for the 2012 LZ 100 is CCRCs.

**Change in Total Communities from 2010 to 2011.** This column provides the change in the listed organization's TOTAL communities (all types) between year-end 2010 and year-end 2011. A net total of fifteen (15) communities were added during 2011 by the 2012 LZ 100 (note that the discrepancy between these 15 communities and the 12 communities mentioned above is due to the change in composition between the 2012 LZ 100 and the 2011 LZ 100). A same-store analysis of the 2012 LZ 100 shows that nearly 200 communities have been added over the past ten years (Chart 4-2d). The activity of adding or disposing of communities was unevenly spread between the largest 50 of the 2012 LZ 100 and those in the bottom half. In the bottom half of the 2012 LZ 100, a net total of three communities was added, with the remaining twelve added to those in the largest 50. Ecumen (LZ 100 #17) and Evangelical Lutheran Good Samaritan Society (LZ 100 #1) added the highest number of communities during the year (4). Last year and this year, six of the systems on the listing had a net reduction of at least one community.

Chart 4-2b provides two examinations of three-year comparisons of the LZ 100 organizations. The first half of the chart examines the community holdings between each of the three years' LZ 100 listings (e.g., the types of communities owned by the 2010 LZ 100 compared to types of communities owned by the 2011 LZ 100, compared to the types of communities owned by the 2012 LZ 100). The latter half of the chart examines the 2012 LZ 100 for each of these periods ("same-store" analysis).

Both examinations illustrate the shift away from institutionalized, high-level care to more residential and home care settings. The 2012 LZ 100's nursing communities declined from 22.7 percent in 2000 to 16.0 percent of the community mix in 2011. Since 2000, the LZ 100 has added eight newly constructed not-for-profit nursing homes; this is countered by a four-fold number of dispositions of nursing homes (32), generally through closure or sale to for-profits.

The “same-store” analysis of the growth of the 2012 LZ 100 by unit type and by level of care from 2000 to 2011 (Charts 4-1h and 4-2h) helps to explain how this transition is occurring. These charts show that although nursing beds have increased, albeit slightly, over time, the number of nursing homes has declined. What is significant, however, is that nursing homes have decreased as a percent of community mix each year since 2000. (Chart 4-2g). The underlying data show that the number of nursing beds is primarily increasing through the growth of CCRCs and assisted living communities adding nursing beds. Of the communities that added nursing beds in 2011 (42), 32 were CCRCs, four were assisted living communities, and six were stand-alone nursing communities.

## Locations

The LZ 100 own and operate communities in 43 states. A state map provides a view of each state by the number of communities owned there by the LZ 100 (Chart 4-3a). Chart 4-3b ranks each of the different community types by the states in which they are owned. Minnesota continues to top the list for IL, AL and NH communities; Pennsylvania continues to top the list for CCRC locations. The state with the largest number of LZ 100-owned communities is Minnesota (157). States that one might expect to have a higher number of communities, such as New York or California, are home to a number of health system-sponsored senior living organizations or primarily government-subsidized senior living providers, which are not included in the LZ 100 **Primary Ranking**. A map with the locations of CCRCs owned by the 2012 LZ 100 (Chart 4-3c) shows the dominance of Pennsylvania and California. The locations of the IL, AL and NH communities owned by the LZ 100 highlight the prominence of Minnesota noted above in each of these areas (Charts 4-3d-f).

## System Headquarters

The state shown for each of the LZ 100 indicates their headquarters' location. Pennsylvania is home to more LZ 100 headquarters than any other state (19 headquarters), more than twice as many as the next leading states of California, Texas, Illinois, Minnesota, and New York (Chart 4-4a). Six of the 19 Pennsylvania multi-sites' headquarters are in the largest 25. Though most consider Florida home to a higher count of senior living communities than most other states (and, as shown in Chart 4-3b, it is one of the top states for CCRC locations), only three of the LZ 100 systems have headquarters in the state. Chart 4-4c offers a geographic view of the size of the LZ 100 organizations, with Pennsylvania and the mid-Atlantic area hosting the greatest density of LZ 100 in both number of organizations and size of organizations. The Midwest region has the second highest density.

## Metropolitan Statistical Areas (MSAs)

Metropolitan Statistical Areas (MSAs) are areas defined by the Office of Management and Budget (OMB) for purposes of tabulating statistics on clearly defined metropolitan boundaries. These boundaries are based on Census 2000 data and applied by preset rules. They were announced by OMB effective June 6, 2003. Areas are identified by county, with several counties making up a particular MSA.

The National Investment Center for the Seniors Housing & Care Industries (NIC) has developed a database that provides a comprehensive tool for understanding supply and demand for the top 100 metropolitan statistical areas (MSAs) called the Market Area Profiles, or MAP™. The MAP™ data and analysis allow management staff of a multi-site access to data on operating performance in their MSAs as well as their defined local market.

The locations of the communities owned by LZ 100 organizations in the largest 30 MSAs tracked by the MAP™ study are charted, showing the number and type of communities within each of the MSAs (Charts 4-5a-c). The communities of the LZ 100 organizations are located in 29 of the 30 MSAs; with 360 out of 973 (37 percent) of the LZ 100 organizations' communities in those MSAs. Minneapolis/St. Paul is the MSA with the highest number of communities, a finding consistent with Minnesota's dominance in the count of IL, AL and NH communities (Chart 4-5b); Los Angeles and Pittsburgh continue to top the list of the MSAs hosting the LZ 100's affordable housing; Detroit and New York City follow closely behind. (Chart 4-5c)

## Classifications

A multi-site's geographic market area, what the LZ 100 listing terms its primary classification, offers a descriptive glimpse of the location of the multi-site's senior living properties (Chart 4-6a). A multi-site's primary classification describes the market area that includes ALL of its properties, regardless of type (including government-subsidized senior living). For some, the market area may be established by implicit boundaries, due to regulatory constraints or even due to the system's own name. Some multi-sites may change their names, as we'll discuss further, to more accurately reflect new growth strategies.

The LZ 100 are classified by their primary markets according to eight categories:

- National
- Across states
- Tri-state
- Bi-state
- Single state
- State region
- Metropolitan
- Sub-metropolitan



Definitions and examples of the eight market categories are listed below:

- **National.** Systems whose properties are located among multiple states in more than one region of the United States. A number of the 13 national systems focus their operations either west of the Mississippi River or Rocky Mountains or east of the Mississippi. Few of the national systems have an abundance of properties broadly scattered across the country. Examples: Pacific Retirement Services, Inc. (LZ 100 #13) — a national system with a disparate geographic distribution of its communities; locations are primarily on the West Coast, with two communities in Wisconsin and one in Texas. Retirement Housing Foundation (LZ 100 #6) is a national system with communities in multiple states spread across the country.
- **Across States.** Systems whose communities are located among multiple states, primarily in one region of the United States. Example: Presbyterian Senior Living (LZ 100 #11) is classified as an across states system with a focus in the Mid-Atlantic U.S. and one additional community in Ohio.
- **Tri-state.** Systems whose communities are located across three states, typically, contiguous. Example: Elim Care (LZ 100 # 29) has communities located in Iowa, Minnesota, and North Dakota.
- **Bi-state.** Systems whose communities are located across two states, typically, contiguous. Example: Lutheran Life Communities (LZ 100 #50) has communities operating in Illinois and Indiana.
- **Single State.** Systems whose communities are contained within a single state's borders and are spread across multiple regions of the state. Example: SantaFe Senior Living (LZ 100 #49)—multiple communities within Florida, spread across multiple regions of the state (from southeast Florida to north central Florida, east and west).
- **State Region.** Systems whose communities are contained within a single region within a single state's borders. Example: WesleyLife (LZ 100 #48)—multiple communities centrally concentrated in Iowa.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: The Eddy (LZ 100 #54)—multiple communities throughout the Albany, New York, area.
- **Sub-metropolitan.** Systems whose communities are contained within a sub-section of a metropolitan area, that is, they are concentrated in one section of a metropolitan area. The larger the metropolitan area, the more likely the possibility that a multi-site may emerge within a sub-metropolitan area. Example: The communities of Goodwin House Incorporated (LZ 100 #92) are located in the southwestern quadrant of the DC-Arlington metropolitan area.

Chart 4-6b shows that the bulk, nearly 70 percent, of the LZ 100 organizations operate within a single state's boundaries (Single State, State Region, Metropolitan or Sub-metropolitan). Generally, a multi-site moves gradually from a single-state, to a bi-state, to a tri-state, then across states to a national multi-site. For example, Augustana Care Corporation has operated in the Minneapolis area for most of its existence. In the 2000s it added communities in other areas of Minnesota. Now, in 2011, it has expanded outside of Minnesota, with the acquisition of a community in Colorado. National multi-sites are 13 percent of the LZ 100 and tend to be among the largest of the LZ 100 organizations, but, as noted earlier, a smaller percentage of these national multi-sites have communities that are broadly spread across the country.

A multi-site may have a secondary market, as well. For example, bi-state multi-site Lutheran Senior Services (LZ 100 #9) has a secondary metropolitan market, with a concentration of communities in St. Louis. For some, a secondary market may reflect differences in service and community type. For example, a multi-site may have a national market spread for its government-subsidized (affordable) housing properties but a smaller spread for its CCRCs. National Church Residences (LZ 100 #38), for example, has its government-subsidized units spread across the nation but its market-rate senior living is in Ohio only.

The secondary classification provides a snapshot of a system's geographic concentration of communities. Just 40 of the LZ 100 systems have such a market concentration. (Chart 4-6c)

## Corporate Name Changes

An ongoing trend among the LZ 100 organizations and organizations emerging into multi-sites is that of changing the name of the organization to more accurately reflect who they are. In early years name changes have reflected the changing primary classification, or market area, of the multi-site, as they grow beyond the scope of their previous name. In recent years, name changes are focused less on location and more on accurately conveying the organization's mission and individual identity (Chart 4-7).

## Ratings

There are currently three rating agencies that rate senior living debt: Moody's, Standard & Poor's, and Fitch Ratings, two of which, Standard & Poor's and Fitch Ratings, are currently active. A listing of multi-site organizations with debt rated by Standard & Poor's or Fitch Ratings is shown in Chart 4-8a. A multi-site with an "NR" shown as an agency's rating means that the multi-site does not have its debt rated by that agency as of 12/31/11. Systems with senior living communities that have obtained ratings on that particular community's strength, rather than on the credit strength of the multi-site or an obligated group within the multi-site, are not shown on the listing.

Thirty-six (36) of the LZ 100 organizations have outstanding debt rated by Standard & Poor's and/or Fitch Ratings. Chart 4-8b presents the categories of each of the ratings, showing that the majority, 57 percent, of the ratings for LZ 100 organizations fall in the "BBB" category (that is, with ratings of "BBB+," "BBB" or "BBB-").

## Revenues

In recent editions of the LZ 100, operating practices of the 25 largest systems were examined with regard to average annual debt and revenue of these organizations. After initial feedback from responding organizations, it was decided that a closer study of various campus-based and non-campus-based revenue sources would be conducted (Chart 4-9). Not surprisingly, campus-based senior living accounts for the majority (85.6 percent) of the LZ 100's overall annual revenue, with Home and Community-Based Services (HCBS) for non-residents as the next largest source (3.1 percent). Some other additional revenue sources mentioned by respondents include: hospice, child care programs, grants & research, and physician services to residents and non-residents. Comparative annual revenue data will continue to be examined further in subsequent editions of the LZ 100.

## Corporate Staff

Yet another area of the 2012 LZ 100 is an analysis of the corporate level staffing of select operating areas for the LZ 100 organizations (Charts 4-10a-b). More than 80 percent of the LZ 100 have corporate level information technology (IT), fundraising, human resources, and marketing positions, the majority of which report to the CEO (except for IT, which generally report to the CFO). More than 30 percent of the LZ 100 expanded Marketing staffing, a trend which may continue based upon recent struggles in the economy and housing markets among LZ 100 organizations.

## CARF-CCAC Accreditation

For senior living organizations, accreditation may be sought through several accrediting bodies, but CCRC accreditation is granted only through CARF-CCAC. CARF-CCAC accredits CCRCs and aging services networks that are part of home, community or hospital-based systems; sites under a corporate organization; and other types of providers. Accreditation is a voluntary program that fosters an independent, equitable and objective evaluation process by an outside organization. An accredited organization is one that has been evaluated and meets internationally recognizable standards. Professionals conduct on-site surveys determining the degree to which an organization meets these standards.

The accreditation process is a long and extensive one; each community is evaluated individually rather than as a system. Therefore, it is not uncommon to find a multi-site in which some of its communities are accredited and others not. Though a multi-site may have five CCRCs in its portfolio, not all five will necessarily have been granted accreditation. An organization may also receive accreditation for certain services offered, yet not receive CCRC accreditation.

The listing of LZ 100 with organizations that have obtained CARF-CCAC accreditation as of May 1, 2012, is shown in Chart 4-11a. Thirty (30) of the LZ 100 organizations have a CARF-CCAC accredited organization within their system (Chart 4-11b). In 2011, 27 percent of the 2012 LZ 100's CCRCs were accredited (Chart 4-11c). These organizations have approximately 50 percent of the CARF-CCAC accredited CCRCs (that is, they have 138 of CARF-CCAC's 287 accredited aging service continuums as of 5/1/12).

## Residents and Staff

The LZ 100 analyses include an examination of the number of residents served and the number of full-time equivalents (FTEs) they employ. More than 96 percent of the LZ 100 responded to these questions in this year's survey. Serving a range of residents in one organization, from a low of 706 to a high of 19,849, nearly 219,000 residents are served by the 96 respondents; more than 227,700 are estimated to be served by the 2012 LZ 100. An average of approximately 1,278 FTEs, with a low of 288 FTEs in one organization to a high of 15,437 in another, are employed per organization. Note that the number of FTEs per resident increased slightly from 2010 to 2011 after remaining fairly consistent the last couple of years, perhaps a reflection of organizations responding to resident needs (Chart 4-12a).

Few measures of FTEs per resident are captured in the senior living sector as a whole. LeadingAge's **Continuing Care Retirement Communities: 2012 Profile** shows FTEs per resident of .58. This percentage is up from .53 reported in their **2005 Profile**. The survey respondents for the LeadingAge profile were composed entirely of CCRCs but were a mix of single-sites and multi-sites. The all-multi-site LZ 100 is composed of CCRCs, IL, AL and NH; the FTE per resident of the LZ 100 rose slightly to .64. The range in this value between organizations was significant, from a high of 1.62 at a multi-site organization composed predominantly of nursing care beds and assisted living, to a low of .15 at an organization composed primarily of independent living units.

One of the factors by which the capital markets evaluate a prospective borrower is the strength of its management team and its leadership. It is in this area that multi-site, not-for-profit organizations can excel, for there is generally stability in leadership marked by long tenure (Chart 4-12f), particularly among CEOs, COOs and often among CFOs. Several years ago we began asking each LZ 100 respondent to indicate if their organization had had a change in their CEO, CFO or COO positions during the past year. With most organizations reporting in these areas, the CEO area reported the lowest level of turnover (just six of the 100 reported a change in this position). Turnover in CFOs occurred at seven organizations (slightly less than in 2010) and COO changes occurred at eleven. The COO position continues to be fine-tuned within the organizations. The 2012 LZ 100 were asked to describe their key in-house corporate staff positions. Charts 4-10a-b show the degree to which various positions are utilized among this group. In 2011, corporate level positions in information technology, human resources, fundraising, and marketing were most prevalent among these. Fewer systems utilized corporate positions with a legal or HCBS expertise, although a significant proportion—nearly 25 percent—of organizations with an HCBS position expanded this area in 2011. The most significant increase in the utilization of corporate staffing was in Marketing with more than 30 percent of the organizations adding staffing to this area (Chart 4-10b).

## Year Founded

The year founded (Chart 4-13a) describes a multi-site's year of inception, when known. Many of the multi-sites in the LZ 100 were founded 50 to more than 100 years ago. If the date of inception was not available and not provided by the LZ 100 organization, then the opening date for the oldest community is used as the "year founded." When the organization is a result of a merger (for example, Living Branches) the date of the oldest of the merged organizations' inception dates is used. Twenty-nine (29) of the LZ 100 have been in operation for more than 100 years. The oldest of the LZ 100 organizations, Lutheran Senior Services (LZ 100 #13), was founded in 1858. The oldest among the "Next 50" (Chart 3-1e) is Maple Knoll Communities, which opened its original community in 1848, through the efforts of Lydia Beecher, Harriet Beecher Stowe's stepmother. Like many, many of the LZ 100, its origins include serving those in need: in the mid-1970s, its flagship campus, Maple Knoll, was developed through the merger of a home for men, a home for women and a home for unwed mothers. None of the LZ 100 have been in operation for 10 years or less: the "youngest" LZ 100 system, Senior Quality Lifestyles Corporation (LZ 100 #36), was founded in 1999. The mean (average) inception date of the LZ 100 organizations is 1937. The median inception date is 1947.

## Affiliation

Nearly all of the LZ 100 organizations have an affiliation with a religious organization or a fraternal or military group (Chart 4-14a). Just 12 organizations appear to have no affiliation and were likely formed out of a local community group of interested persons. The majority of those with affiliations are faith-based, predominantly those that are Lutheran, Methodist, Presbyterian and United Church of Christ. Twenty-nine of the organizations have a Methodist or Presbyterian affiliation. When classifying the organizations for the affiliation analyses, affiliations with various churches within a denomination were aggregated under the more general denomination's name, e.g. whether affiliated with the Free Methodist or the United Methodist denominations, both are classified as "Methodist." When the LZ 100 units are sorted by affiliation, the Lutheran denomination also has the highest number of units (41,331), approximately 20 percent of the total LZ 100 unit count. When an organization is seeking to affiliate or to dispose of a community within its portfolio, partnership is often sought with an organization of a similar religious or fraternal affiliation.

## Affordable Housing

The ranking of the LZ 100 organizations by the number of affordable (non market-rate) units is included with this research to show that a number of the LZ 100 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management of these organizations and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Providing government-subsidized senior living, particularly through the HUD 202 program, is a very straightforward way for many organizations to fulfill their missions of providing services to residents with more limited financial resources. Last year's publication showed that 55 percent of the LZ 100 provide affordable housing. The percentage of this year's LZ 100 who provide government-subsidized housing has decreased slightly (Chart 4-15c) to 54 percent. In a ranking of the largest 10 providers of affordable (government-subsidized units), four of these are in the **Primary Ranking** of the LZ 100. See Chapter 6 (Listing 6-1) for a more comprehensive not-for-profit listing, a ranking of the largest LeadingAge-member, multi-site, affordable housing providers (including those who are not ranked on the **Primary Ranking**).

## Managed Properties

It is not uncommon for a senior living community to be managed by an organization that does not own it. In fact, there are several companies in the senior living sector whose primary business purpose is to provide management services to properties they don't own. The LZ 100 organizations are, on the contrary, primarily property owners. The number of respondents to this area of the survey has increased significantly in past years (from 58 respondents in 2004, to 100 respondents in 2011). Approximately one third of the LZ 100 manage as well as own senior living units (Chart 4-16c), but the overwhelming portion of their portfolio of units is owned (79 percent). Respondents were asked to distinguish the types of communities they managed. Approximately 30 percent of the units and 20 percent of the communities managed are memory support, nursing care or assisted living units. This year's LZ 100 managed portfolio had a net decrease of nearly 360 total units. The number of managed units decreased for assisted living and nursing care, but increased in independent living and memory support.

A significant proportion of the units and communities managed were shown as independent living. We believe that these numbers may include a high percentage of government-subsidized properties. As systems grow in size, it is not uncommon for them to take on management of other existing senior living units and communities, sometimes across the full spectrum of unit types (in particular, government-subsidized, HUD 202 properties). The origin of these management contracts may evolve from a variety of situations, but generally third-party management evolves with communities from the same geographic region as existing operations of the multi-site organization or within the same religion (e.g. Lutheran to Lutheran). When the community seeking management assistance is struggling operationally or financially (or a combination of both), perhaps with a large project underway, it often looks to partners in the same religion for assistance. Over time some of these management relationships become an affiliation.

## Memory Support

This year's publication is the fourth in which the percentage of LZ 100 organizations that own and operate memory support (MS) units is analyzed. How these units are allocated within the assisted living and nursing levels of care is detailed in Charts 4-17a-c. In the 2011 LZ 100, 87 systems reported offering MS; in the 2012 LZ 100 this number slightly decreased to 86—43 percent of which feature both AL and NC memory support units. As the health care industry continues to refine its understanding of diseases such as Alzheimer's and other forms of dementia, the LZ 100 may further delineate changes in the allocation of units to memory support care.

## Home and Community-Based Services

This year's survey continued to provide a much closer look at senior living providers' provision of home and community-based services. A key feature of the annual LZ 100 survey is to determine the level of home and community-based services (HCBS) offered by the LZ 100. Chart 4-18c is a snapshot of how the provision of HCBS has changed among the LZ 100 organizations that are providing services beyond their communities' walls to the surrounding community. With 100 of the LZ 100 responding, 72 percent indicate that they provide HCBS, a slight decrease from last year (73 percent) yet slightly higher than the 2010 LZ 100 (71 percent). This percentage increases to 82 percent when the largest 50 are examined, another slight increase from last year (80 percent) and the same as reported in the 2010 publication. A comparison between years (Chart 4-18d) shows that 32 percent of the LZ 100 are offering more HCBS in 2011 than they offered in 2010 (23 percent), and in 2009 (19 percent). Chart 4-18c shows which areas of HCBS have been the focus of these increased services.

Closer study of the data shows a correlation between age of organization and delivery of these services (Chart 4-18b). The average age of the organizations providing HCBS is approximately 76 years. This would suggest that as organizations age, they are increasingly likely to see HCBS as a way by which to broaden and/or extend their mission beyond their residents to the surrounding community. Organizations such as Ohio Presbyterian Retirement Services (LZ 100 #14) have grown this service area of their organizations beyond the surrounding community to even larger market areas, so that while OPRS owns approximately 3,000 senior living units, it serves well more than 95,000 seniors across the state of Ohio.

This year, organizations were asked to provide total HCBS revenues for both residents and non-residents (Chart 4-9) as a percentage of overall annual revenue. Opposite of same store analysis in the prior year, the 2012 LZ 100 earned more revenue providing HCBS to residents than non-residents, except when analyzing all 100 of the LZ 100 organizations.

## Program of All-Inclusive Care for the Elderly (PACE)

This is the third year that the LZ 100 includes an examination of the LZ 100 organizations' levels of participation in the Program of All-Inclusive Care for the Elderly, or PACE. The PACE program is meant to administer comprehensive medical and social services to individuals who live outside of the traditional retirement community setting. This can be accomplished through adult day health centers, inpatient facilities, or in the actual homes of enrollees. This is still a fairly new concept, as evidenced by the fact in Chart 4-19a that only 12 LZ 100 organizations currently provide PACE services (up 2 from 2010) to a total of nearly 1,500 enrollees (Chart 4-19b), but research efforts will continue to expand as the program gains national attention and momentum in senior living.

## Small House & Green House® Models

Another emerging trend among seniors housing providers is the continued focus of resident-centered care by moving away from the traditional, institutional model of nursing care to more personal, homelike settings. Small houses and Green Houses® (which are a 'subset' of small houses) are designed to replicate an ordinary home that is capable of housing, typically, six to twelve elders with their own private rooms; sleeping, eating, and activity times are flexible as opposed to scheduled. The resident-centered care movement continues to grow among the LZ 100 organizations with a total of 169 small houses (an increase of 2), 44 of which are Green Houses®, in operation by 18 members of the LZ 100. (Chart 4-20b)



## 4-1 2012 LeadingAge Ziegler 100

### Analysis of the Data: Units

#### 4-1a 2012 RANK, DETAILED BY UNITS (2011 VS. 2010)

2012 Rank	2011 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2010 to 2011
				2011 Units				2010 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,934	5,004	2,135	11,795	18,975	4,866	2,032	12077	-41
2	2	National Senior Campuses	MD	17,197	15,164	928	1,105	17,245	15,196	944	1105	-48
3	3	ACTS Retirement-Life Communities, Inc.	PA	8,130	5,799	885	1,446	8,278	5,946	883	1449	-148
4	4	Presbyterian Homes and Services	MN	6,342	3,192	1,773	1,377	6,096	2,989	1,775	1332	246
5	5	Covenant Retirement Communities	IL	4,711	3,107	724	880	4,724	3,172	668	884	-13
6	6	Retirement Housing Foundation	CA	4,289	2,639	1,000	650	4,123	2,641	886	596	166
7	7	Lifespace Communities, Inc.	IA	4,102	3,117	160	825	3,639	2,848	99	692	463
8	8	Westminster Communities of Florida	FL	3,209	1,994	464	751	3,202	1,983	468	751	7
9	10	Lutheran Senior Services	MO	3,203	1,579	717	907	3,100	1,561	712	827	103
10	17	The Kendal Corporation	PA	3,132	2,264	381	487	2,649	1,890	316	443	483
11	9	Presbyterian Senior Living	PA	3,119	1,368	499	1,252	3,109	1,336	520	1253	10
12	11	Cornerstone Affiliates	CA	2,976	1,761	497	718	2,962	1,779	463	720	14
13	12	Pacific Retirement Services, Inc.	OR	2,878	2,141	307	430	2,878	2,141	307	430	0
14	13	Ohio Presbyterian Retirement Services	OH	2,805	1,540	507	758	2,818	1,545	522	751	-13
15	15	Asbury Communities	MD	2,756	1,924	334	498	2,733	1,902	333	498	23
16	16	Christian Homes, Inc.	IL	2,707	677	280	1,750	2,660	677	280	1703	47
17	21	Ecumen	MN	2,609	286	1,517	806	2,375	286	1,309	780	234
18	14	Front Porch	CA	2,551	1,570	442	539	2,740	1,606	545	589	-189
19	18	Diakon Lutheran Social Ministries	PA	2,506	908	622	976	2,567	943	625	999	-61
20	23	Presbyterian Manors of Mid-America	KS	2,493	886	557	1,050	2,221	660	536	1025	272
21	19	Volunteers of America	VA	2,493	394	593	1,506	2,534	394	593	1547	-41
22	20	Franciscan Communities	IL	2,407	1,080	485	842	2,395	1,069	484	842	12
23	22	Masonic Villages	PA	2,306	1,377	260	669	2,268	1,339	260	669	38
24	24	Willow Valley Retirement Communities	PA	2,023	1501	253	269	2,026	1,504	253	269	-3
25	30	Providence Life Services	IL	1,979	808	472	699	1,693	635	396	662	286

## 4-1 2012 LeadingAge Ziegler 100

### Analysis of the Data: Units

#### 4-1a 2012 RANK, DETAILED BY UNITS (2011 VS. 2010)

2012 Rank	2011 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2010 to 2011
				2011 Units				2010 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	27	Augustana Care Corporation	MN	1,951	135	998	818	1,875	496	547	832	76
27	26	Shell Point	FL	1,937	1,337	272	328	1,937	1,337	272	328	0
28	28	Christian Care Companies	AZ	1,787	1,434	285	68	1,782	1,434	280	68	5
29	29	Elim Care	MN	1,719	264	440	1,015	1,735	264	440	1031	-16
30	31	Otterbein Senior Lifestyle Choices	OH	1,692	716	327	649	1,692	716	327	649	0
31	25	Springpoint Senior Living	NJ	1,691	1,245	179	267	2,011	1,221	490	300	-320
32	34	be.group	CA	1,615	954	429	232	1,590	950	408	232	25
33	32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,601	259	628	714	1,601	259	628	714	0
34	33	Hebrew SeniorLife	MA	1,593	660	119	814	1,593	660	119	814	0
35	35	Homewood Retirement Centers	MD	1,590	866	273	451	1,571	858	264	449	19
36	68	Senior Quality Lifestyles Corporation	TX	1,587	989	337	261	1,063	676	213	174	524
37	43	Eskaton	CA	1,549	515	608	426	1,455	515	514	426	94
38	41	National Church Residences	OH	1,542	706	373	463	1,472	670	339	463	70
39	37	Bethesda Health Group, Inc.	MO	1,522	627	34	861	1,492	627	16	849	30
40	42	Episcopal Senior Communities	CA	1,505	1,033	96	376	1,468	1,002	90	376	37
41	39	Holland Home	MI	1,485	723	501	261	1,485	723	501	261	0
42	36	Buckner Retirement Services, Inc.	TX	1,481	884	315	282	1,540	878	380	282	-59
43	38	Presbyterian Homes	IL	1,475	862	231	382	1,485	864	234	387	-10
44	44	Greencroft	IN	1,449	528	388	533	1,452	533	383	536	-3
45	45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	1,410	60	135	1215	0
46	52	Concordia Lutheran Ministries	PA	1,400	453	705	242	1,255	453	560	242	145
47	46	Mississippi Methodist Senior Services	MS	1,390	805	265	320	1,395	814	261	320	-5
48	47	WesleyLife	IA	1,330	695	261	374	1,339	734	264	341	-9
49	48	SantaFe Senior Living	FL	1,276	940	276	60	1,276	940	276	60	0
50	50	Lutheran Life Communities	IL	1,273	243	283	747	1,263	186	259	818	10

## 4-1 2012 LeadingAge Ziegler 100

### Analysis of the Data: Units

#### 4-1a 2012 RANK, DETAILED BY UNITS (2011 VS. 2010)

2012 Rank	2011 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2010 to 2011
				2011 Units				2010 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	59	Lutheran Services for the Aging	NC	1,270	257	281	732	1,170	257	281	632	100
52	49	Masonicare	CT	1,266	458	272	536	1,266	458	272	536	0
53	51	Baptist Village Retirement Communities of Oklahoma	OK	1,262	766	171	325	1,258	762	171	325	4
54	57	The Eddy	NY	1,230	499	313	418	1,206	499	313	394	24
55	54	Bethesda Senior Living Communities	CO	1,221	204	1,017	0	1,219	208	1,011	0	2
56	55	Virginia Baptist Homes	VA	1,217	770	227	220	1,217	770	227	220	0
57	56	Phoebe Ministries	PA	1,215	406	146	663	1,214	406	145	663	1
58	53	Virginia United Methodist Homes, Inc.	VA	1,212	627	328	257	1,220	649	311	260	-8
59	64	American Baptist Homes of the Midwest	MN	1,200	374	209	617	1,143	375	151	617	57
60	58	Lutheran SeniorLife	PA	1,197	412	327	458	1,197	412	327	458	0
61	62	EMA, Inc.	MD	1,157	652	228	277	1,157	652	228	277	0
62	60	Lutheran Social Services of South Central Pennsylvania	PA	1,150	555	251	344	1,163	557	262	344	-13
63	61	Sears Methodist Retirement System, Inc.	TX	1,135	531	138	466	1,162	402	84	676	-27
64	65	Air Force Villages	TX	1,103	755	180	168	1,111	759	180	172	-8
65	66	Northern California Presbyterian Homes and Services	CA	1,085	840	104	141	1,085	840	104	141	0
66	67	Presbyterian SeniorCare	PA	1,065	359	285	421	1,065	359	285	421	0
67	63	United Methodist Homes	NY	1,059	395	238	426	1,152	399	245	508	-93
68	74	Presbyterian Villages of Michigan	MI	1,043	564	301	178	1,028	604	246	178	15
69	73	Lutheran Homes of South Carolina	SC	1,038	386	328	324	1,031	386	325	320	7
70	71	Walker Methodist	MN	1,034	493	165	376	1,034	493	165	376	0
71	75	United Methodist Homes of New Jersey	NJ	1,028	88	688	252	1,028	88	688	252	0
72	76	Wesley Enhanced Living	PA	1,019	501	218	300	1,022	501	221	300	-3
73	70	VMP	WI	1,016	574	205	237	1,039	574	235	230	-23
74	77	Elant	NY	999	148	148	703	999	148	148	703	0
75	78	United Church Homes	OH	992	158	160	674	998	158	160	680	-6

## 4-1 2012 LeadingAge Ziegler 100

### Analysis of the Data: Units

#### 4-1a 2012 RANK, DETAILED BY UNITS (2011 VS. 2010)

2012 Rank	2011 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2010 to 2011
				2011 Units				2010 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	79	Menno Haven	PA	959	569	177	213	959	569	177	213	0
77	72	Presby's Inspired Life	PA	959	477	222	260	1,032	476	231	325	-73
78	80	The Presbyterian Homes, Inc. of North Carolina	NC	956	634	133	189	956	634	133	189	0
79	82	United Church Homes & Services	NC	939	520	91	328	942	523	91	328	-3
80	83	United Methodist Retirement Homes, Inc.	NC	937	630	101	206	930	621	103	206	7
81	88	Methodist Retirement Communities and Affiliates	TX	918	314	180	424	885	333	128	424	33
82	94	Lutheran Homes of Michigan	MI	913	305	224	384	913	305	244	364	0
83	84	St. Ann's Community	NY	912	246	75	591	912	246	75	591	0
84	81	Christian Care Centers	TX	909	402	137	370	937	402	137	398	-28
85	85	United Methodist Memorial Home	IN	909	181	469	259	896	168	469	259	13
86	98	Mather LifeWays	IL	899	622	46	231	801	524	46	231	98
87	86	Oakwood Lutheran Senior Ministries	WI	890	593	160	137	890	593	160	137	0
88	89	Cedar Community	WI	881	431	203	247	881	431	203	247	0
89	90	Presbyterian Communities and Services	TX	864	334	139	391	864	334	139	391	0
90	92	Simpson Senior Services	PA	858	494	172	192	858	494	172	192	0
91	95	Presbyterian Communities of South Carolina	SC	854	294	294	266	832	294	298	240	22
92	93	Goodwin House Incorporated	VA	845	597	99	149	857	609	99	149	0
93	87	Living Branches	PA	843	464	246	133	888	464	291	133	-45
94	96	Garden Spot Village	PA	820	542	86	192	820	542	86	192	0
95	97	LutherCare	PA	812	473	128	211	817	478	128	211	-5
96	99	Elder Care Alliance	CA	803	39	657	107	797	39	651	107	6
97	**NR	Christian Care Communities	KY	801	185	103	513	679	185	103	391	122
98	100	Morningside Ministries	TX	788	311	141	336	796	312	144	340	-8
99	**NR	Sunnyside Communities	VA	782	524	124	134	782	524	124	134	0
100	**NR	Western Home Communities	IA	782	452	230	100	770	440	230	100	12
Total Units				21,833	10,633	4,637	6,563	21,694	10,540	4,662	6,492	151

\*\* NR: Not Ranked in that year

## 4-1 2012 LeadingAge Ziegler 100

### Analysis of the Data: Units

#### 4-1b SUMMARY OF UNIT MIX (BY LARGEST 10, 25, 50 & TOTAL)

Largest	ILU	ALU	NCB	Total Units	% as total of LZ 100 units
10	43,859	9,167	20,223	<b>73,249</b>	<b>36%</b>
25	62,080	16,792	32,985	<b>111,857</b>	<b>56%</b>
50	80,013	25,550	45,144	<b>150,707</b>	<b>75%</b>
100	102,418	37,115	61,220	<b>200,753</b>	<b>100%</b>

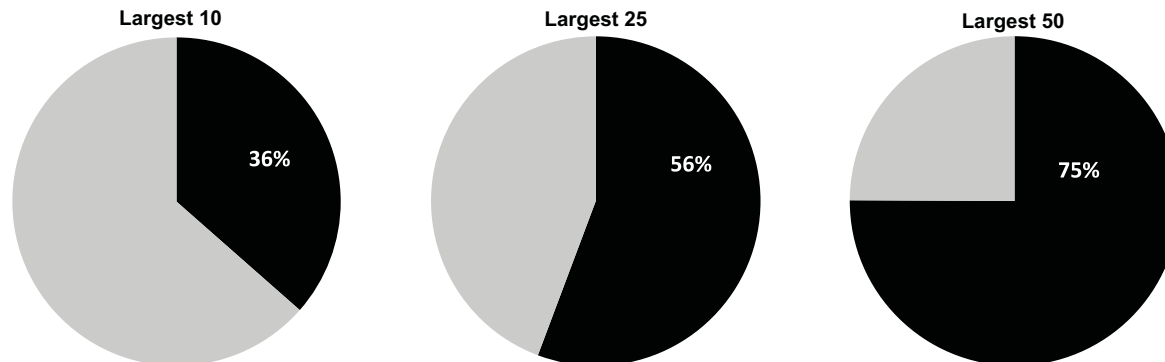
#### Analysis of Unit Mix for Each Year's Respective LZ 100 Listing

<b>2010 LZ 100</b>				
2009 avg units/system	1,006.3	340.7	640.6	1,987.6
% of total	50.6%	17.1%	32.2%	100.0%
<b>2011 LZ 100</b>				
2010 avg units/system	1,002.7	360.0	627.3	1,989.9
% of total	50.4%	18.1%	31.5%	100.0%
<b>2012 LZ 100</b>				
2011 avg units/system	1,024.2	371.2	612.2	2,007.5
% of total	51.0%	18.5%	30.5%	100.0%

#### Analysis of Unit Mix for 2012 LZ 100

2009 avg units/system	1,004.3	344.3	615.5	1,964.1
% of total	51.1%	17.5%	31.3%	100.0%
2010 avg units/system	1,010.3	358.6	612.4	1,981.3
% of total	51.0%	18.1%	30.9%	100.0%
2011 avg units/system	1,024.2	371.2	612.2	2,007.5
% of total	51.0%	18.5%	30.5%	100.0%

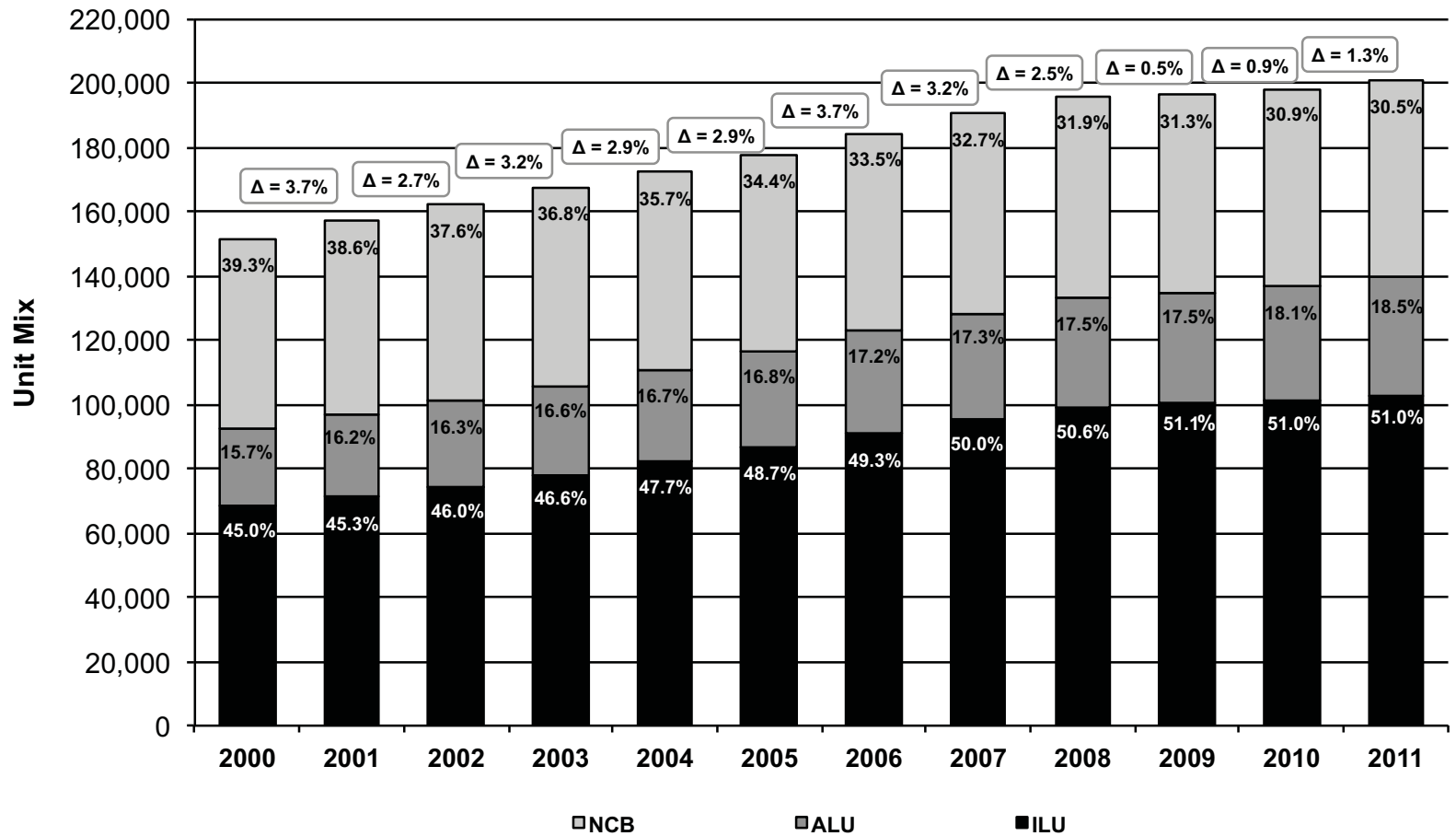
#### 4-1c PERCENTAGE OF TOTAL UNITS OWNED (BY LARGEST 10, 25 & 50)



## 4-1 2012 LeadingAge Ziegler 100

Analysis of the Data: Units

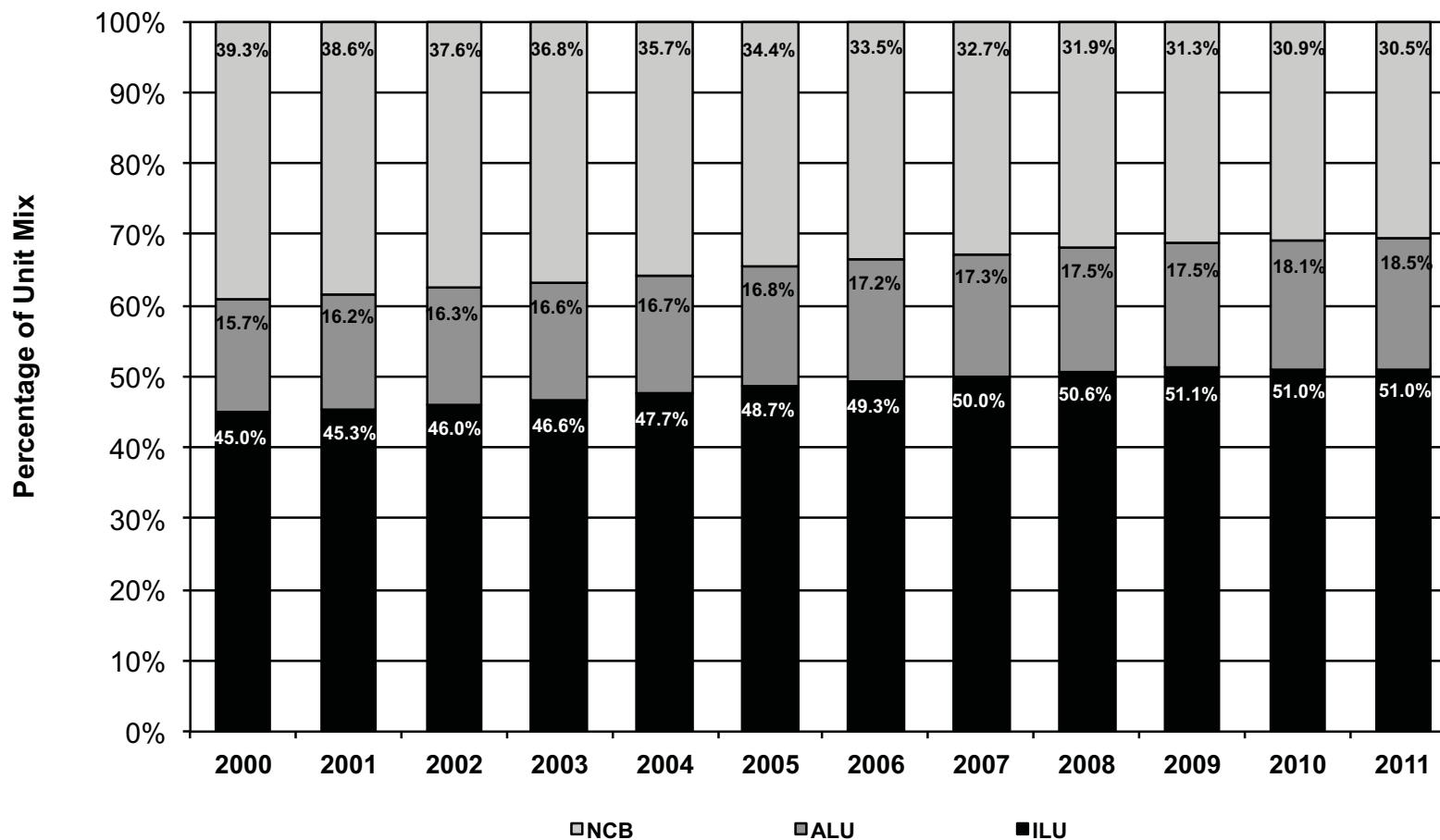
4-1d TOTAL UNIT MIX BY YEAR, BY TOTAL UNITS, 2000 THROUGH 2011, FOR 2012 LZ 100



## 4-1 2012 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1e TOTAL UNIT MIX BY YEAR, BY PERCENT, 2000 THROUGH 2011, FOR 2012 LZ 100

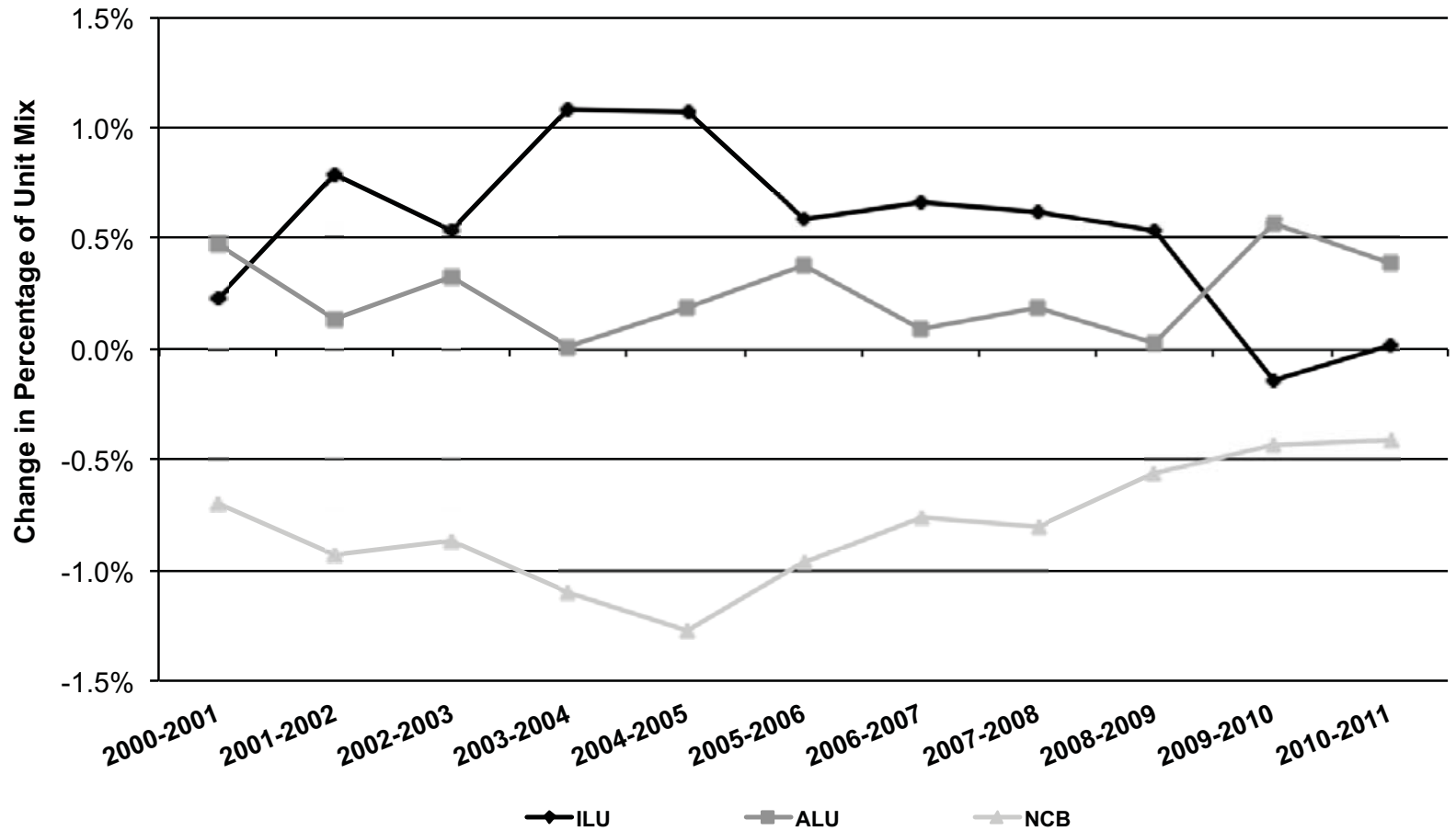




## 4-1 2012 LeadingAge Ziegler 100

Analysis of the Data: Units

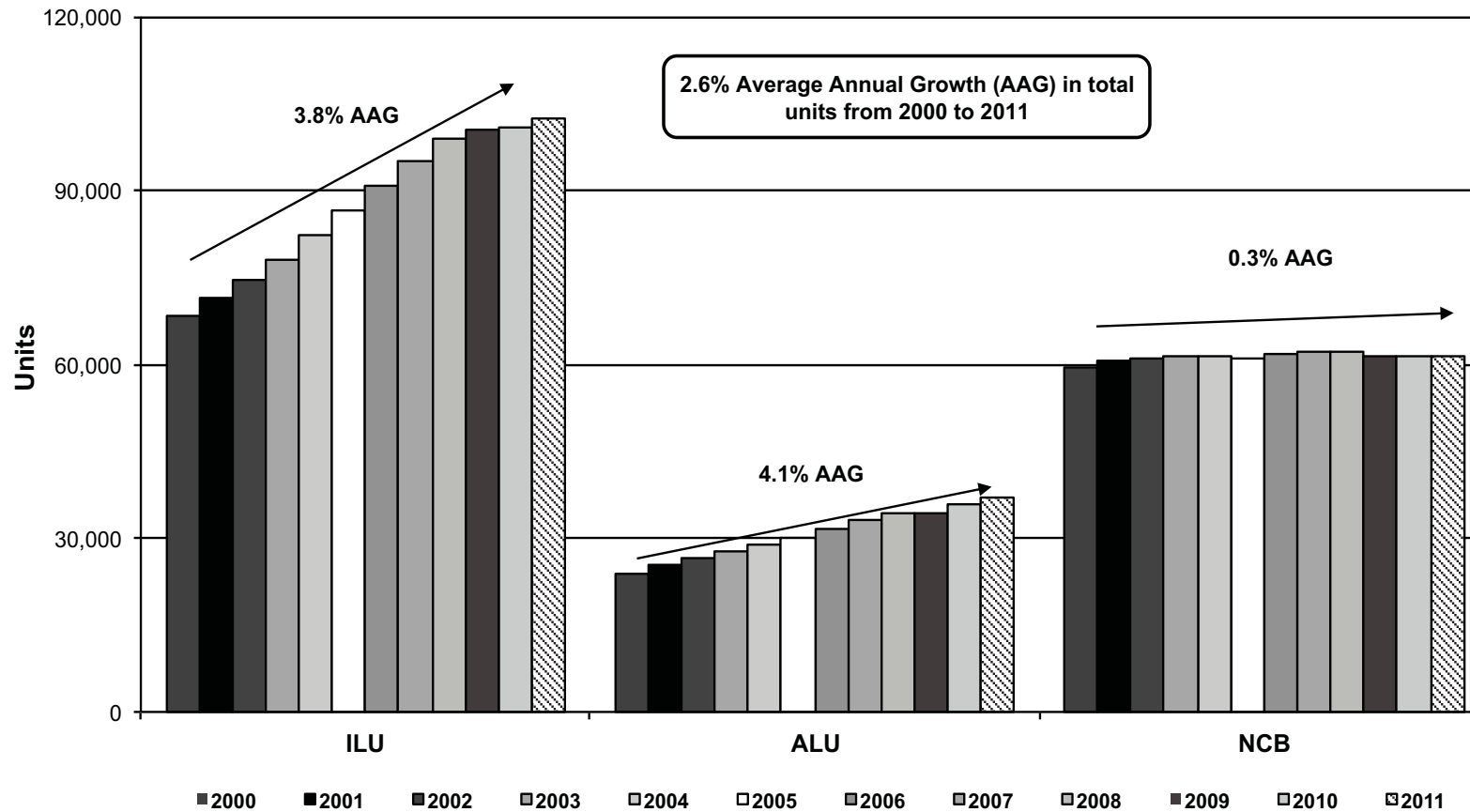
4-1f YEAR OVER YEAR CHANGE IN PERCENTAGE OF UNIT MIX, FOR 2012 LZ 100



## 4-1 2012 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1g UNIT TYPE COMPARISON, BY UNITS, 2000 THROUGH 2011, FOR 2012 LZ 100



## 4-2 2012 LeadingAge Ziegler 100

### Analysis of the Data: Communities

#### 4-2a 2012 RANK, DETAILED BY COMMUNITIES (2011 VS. 2010)

2012 Rank	2011 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2010 to 2011
				2011 Communities					2010 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
1	1	Evangelical Lutheran Good Samaritan Society	SD	184	78	9	37	60	180	75	7	37	61	4
2	2	National Senior Campuses	MD	15	15	0	0	0	15	15	0	0	0	0
3	3	ACTS Retirement-Life Communities, Inc.	PA	23	23	0	0	0	23	23	0	0	0	0
4	4	Presbyterian Homes and Services	MN	36	11	21	2	2	35	10	21	2	2	1
5	5	Covenant Retirement Communities	IL	15	12	1	2	0	15	12	1	2	0	0
6	6	Retirement Housing Foundation	CA	19	9	8	2	0	18	9	8	1	0	1
7	7	Lifespace Communities, Inc.	IA	12	12	0	0	0	11	11	0	0	0	1
8	8	Westminster Communities of Florida	FL	10	8	2	0	0	10	8	2	0	0	0
9	10	Lutheran Senior Services	MO	11	9	0	1	1	11	8	1	1	1	0
10	17	The Kendal Corporation	PA	14	12	2	0	0	13	11	2	0	0	1
11	9	Presbyterian Senior Living	PA	20	12	5	2	1	20	12	4	3	1	0
12	11	Cornerstone Affiliates	CA	11	11	0	0	0	11	11	0	0	0	0
13	12	Pacific Retirement Services, Inc.	OR	9	8	1	0	0	9	8	1	0	0	0
14	13	Ohio Presbyterian Retirement Services	OH	11	9	2	0	0	11	9	2	0	0	0
15	15	Asbury Communities	MD	5	5	0	0	0	5	5	0	0	0	0
16	16	Christian Homes, Inc.	IL	14	13	0	0	1	14	12	1	0	1	0
17	21	Ecumen	MN	40	0	4	27	9	36	0	4	24	8	4
18	14	Front Porch	CA	10	8	2	0	0	11	8	2	1	0	-1
19	18	Diakon Lutheran Social Ministries	PA	11	8	0	3	0	11	8	0	3	0	0
20	23	Presbyterian Manors of Mid-America	KS	18	16	0	1	1	17	15	0	1	1	1
21	19	Volunteers of America	VA	24	3	2	7	12	24	3	2	7	12	0
22	20	Franciscan Communities	IL	10	6	1	3	0	10	6	1	3	0	0
23	22	Masonic Villages	PA	5	3	1	1	0	5	3	1	1	0	0
24	24	Willow Valley Retirement Communities	PA	3	3	0	0	0	3	3	0	0	0	0
25	30	Providence Life Services	IL	11	1	5	1	4	11	1	5	1	4	0

## 4-2 2012 LeadingAge Ziegler 100

### Analysis of the Data: Communities

#### 4-2a 2012 RANK, DETAILED BY COMMUNITIES (2011 VS. 2010)

2012 Rank	2011 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2010 to 2011
				2011 Communities					2010 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
26	27	Augustana Care Corporation	MN	18	0	6	6	6	17	0	6	5	6	1
27	26	Shell Point	FL	2	2	0	0	0	2	2	0	0	0	0
28	28	Christian Care Companies	AZ	4	1	3	0	0	4	1	3	0	0	0
29	29	Elim Care	MN	19	1	2	7	9	19	1	2	7	9	0
30	31	Otterbein Senior Lifestyle Choices	OH	10	5	0	0	5	10	5	0	0	5	0
31	25	Springpoint Senior Living	NJ	5	5	0	0	0	9	5	0	4	0	-4
32	34	be.group	CA	10	6	1	3	0	10	6	1	3	0	0
33	32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	8	1	2	4	1	8	1	2	4	1	0
34	33	Hebrew SeniorLife	MA	4	2	1	0	1	4	2	1	0	1	0
35	35	Homewood Retirement Centers	MD	6	6	0	0	0	6	6	0	0	0	0
36	68	Senior Quality Lifestyles Corporation	TX	5	5	0	0	0	3	3	0	0	0	2
37	43	Eskaton	CA	13	1	3	6	3	13	1	3	6	3	0
38	41	National Church Residences	OH	7	4	0	2	1	6	3	0	2	1	1
39	37	Bethesda Health Group, Inc.	MO	8	2	4	0	2	8	2	4	0	2	0
40	42	Episcopal Senior Communities	CA	7	6	0	0	1	6	5	0	0	1	1
41	39	Holland Home	MI	4	2	0	1	1	4	2	0	1	1	0
42	36	Buckner Retirement Services, Inc.	TX	7	5	2	0	0	7	5	2	0	0	0
43	38	Presbyterian Homes	IL	4	4	0	0	0	4	4	0	0	0	0
44	44	Greencroft	IN	6	6	0	0	0	6	6	0	0	0	0
45	45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	6	2	0	0	4	6	2	0	0	4	0
46	52	Concordia Lutheran Ministries	PA	8	2	0	6	0	6	2	0	4	0	2
47	46	Mississippi Methodist Senior Services	MS	11	2	7	0	2	11	2	7	0	2	0
48	47	WesleyLife	IA	7	7	0	0	0	7	7	0	0	0	0
49	48	SantaFe Senior Living	FL	3	1	2	0	0	3	1	2	0	0	0
50	50	Lutheran Life Communities	IL	5	3	0	2	0	5	3	0	2	0	0

## 4-2 2012 LeadingAge Ziegler 100

### Analysis of the Data: Communities

#### 4-2a 2012 RANK, DETAILED BY COMMUNITIES (2011 VS. 2010)

2012 Rank	2011 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2010 to 2011
				2011 Communities					2010 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
51	59	Lutheran Services for the Aging	NC	8	1	1	1	5	7	1	1	1	4	1
52	49	Masonicare	CT	5	1	1	1	2	5	1	1	1	2	0
53	51	Baptist Village Retirement Communities of Oklahoma	OK	8	3	5	0	0	8	3	5	0	0	0
54	57	The Eddy	NY	8	5	0	1	2	8	5	0	1	2	0
55	54	Bethesda Senior Living Communities	CO	14	0	3	11	0	14	0	3	11	0	0
56	55	Virginia Baptist Homes	VA	4	4	0	0	0	4	4	0	0	0	0
57	56	Phoebe Ministries	PA	4	3	0	0	1	4	3	0	0	1	0
58	53	Virginia United Methodist Homes, Inc.	VA	7	6	0	1	0	7	6	0	1	0	0
59	64	American Baptist Homes of the Midwest	MN	8	4	1	2	1	8	4	1	2	1	0
60	58	Lutheran SeniorLife	PA	7	2	5	0	0	7	2	5	0	0	0
61	62	EMA, Inc.	MD	4	3	0	1	0	4	3	0	1	0	0
62	60	Lutheran Social Services of South Central Pennsylvania	PA	6	6	0	0	0	6	6	0	0	0	0
63	61	Sears Methodist Retirement System, Inc.	TX	6	5	0	0	1	8	5	0	0	3	-2
64	65	Air Force Villages	TX	3	2	0	1	0	3	2	0	1	0	0
65	66	Northern California Presbyterian Homes and Services	CA	4	3	1	0	0	4	3	1	0	0	0
66	67	Presbyterian SeniorCare	PA	3	3	0	0	0	3	3	0	0	0	0
67	63	United Methodist Homes	NY	4	3	0	1	0	5	3	0	1	1	-1
68	74	Presbyterian Villages of Michigan	MI	8	2	6	0	0	8	2	6	0	0	0
69	73	Lutheran Homes of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
70	71	Walker Methodist	MN	6	1	4	1	0	6	1	4	1	0	0
71	75	United Methodist Homes of New Jersey	NJ	5	1	0	4	0	5	1	0	4	0	0
72	76	Wesley Enhanced Living	PA	6	5	0	1	0	6	5	0	1	0	0
73	70	VMP	WI	3	2	1	0	0	4	2	1	1	0	-1
74	77	Elant	NY	6	1	0	1	4	6	1	0	1	4	0
75	78	United Church Homes	OH	6	4	0	0	2	6	4	0	0	2	0

## 4-2 2012 LeadingAge Ziegler 100

### Analysis of the Data: Communities

#### 4-2a 2012 RANK, DETAILED BY COMMUNITIES (2011 VS. 2010)

2012 Rank	2011 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2010 to 2011
				2011 Communities					2010 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
76	79	Menno Haven	PA	3	2	1	0	0	3	2	1	0	0	0
77	72	Presby's Inspired Life	PA	4	2	1	0	1	5	2	1	0	2	-1
78	80	The Presbyterian Homes, Inc. of North Carolina	NC	3	3	0	0	0	3	3	0	0	0	0
79	82	United Church Homes & Services	NC	4	3	0	0	1	4	3	0	0	1	0
80	83	United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
81	88	Methodist Retirement Communities and Affiliates	TX	5	4	0	0	1	5	4	0	0	1	0
82	94	Lutheran Homes of Michigan	MI	9	1	3	2	3	9	1	3	2	3	0
83	84	St. Ann's Community	NY	2	2	0	0	0	2	2	0	0	0	0
84	81	Christian Care Centers	TX	3	3	0	0	0	3	3	0	0	0	0
85	85	United Methodist Memorial Home	IN	3	2	0	1	0	3	2	0	1	0	0
86	98	Mather LifeWays	IL	5	2	2	0	1	4	2	1	0	1	1
87	86	Oakwood Lutheran Senior Ministries	WI	2	2	0	0	0	2	2	0	0	0	0
88	89	Cedar Community	WI	5	2	1	1	1	5	2	1	1	1	0
89	90	Presbyterian Communities and Services	TX	2	2	0	0	0	2	2	0	0	0	0
90	92	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
91	95	Presbyterian Communities of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
92	93	Goodwin House Incorporated	VA	2	2	0	0	0	2	2	0	0	0	0
93	87	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
94	96	Garden Spot Village	PA	2	1	0	0	1	2	1	0	0	1	0
95	97	LutherCare	PA	3	1	1	0	1	3	1	1	0	1	0
96	99	Elder Care Alliance	CA	6	1	0	5	0	6	1	0	5	0	0
97	**NR	Christian Care Communities	KY	11	4	4	2	1	10	4	4	2	0	1
98	100	Morningside Ministries	TX	3	3	0	0	0	3	3	0	0	0	0
99	**NR	Sunnyside Communities	VA	3	3	0	0	0	3	3	0	0	0	0
100	**NR	Western Home Communities	IA	3	1	2	0	0	3	1	2	0	0	0
Total Communities				973	510	142	165	156	960	497	140	165	158	13

\*\* NR: Not Ranked in that year

## 4-2 2012 LeadingAge Ziegler 100

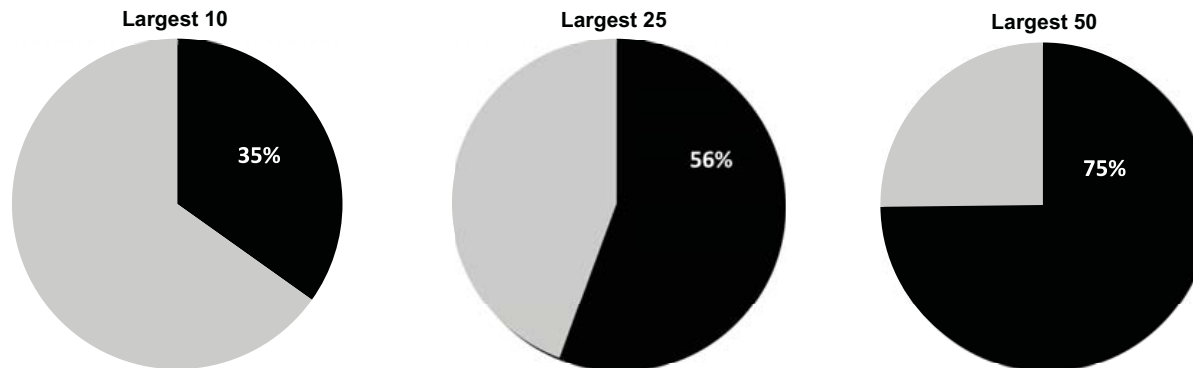
### Analysis of the Data: Communities

#### 4-2b SUMMARY OF COMMUNITY MIX (BY LARGEST 10, 25, 50 & TOTAL)

Largest	CCRC	IL	AL	NH	ALL	% as total of LZ 100
10	189	43	44	63	339	35%
25	295	66	89	91	541	56%
50	375	99	126	128	728	75%
100	509	142	165	157	973	100%

Analysis of Community Mix for Each Year's Respective LZ 100 Listing					
<b>2010 LZ 100</b>					
2009 avg communities/system	4.9	1.3	1.6	1.6	9.4
% of total	52.5%	14.3%	16.6%	16.6%	100.0%
<b>2011 LZ 100</b>					
2010 avg communities/system	4.8	1.5	1.6	1.7	9.6
% of total	50.3%	15.4%	16.8%	17.6%	100.0%
<b>2012 LZ 100</b>					
2011 avg communities/system	5.1	1.4	1.7	1.6	9.7
% of total	52.4%	14.6%	17.0%	16.0%	100.0%
Analysis of Community Mix for 2012 LZ 100					
2009 avg communities/system	4.9	1.4	1.6	1.7	9.6
% of total	51.4%	14.6%	16.8%	17.2%	100.0%
2010 avg communities/system	5.0	1.4	1.7	1.6	9.6
% of total	51.6%	14.7%	17.2%	16.6%	100.0%
2011 avg communities/system	5.1	1.4	1.7	1.6	9.7
% of total	52.4%	14.6%	17.0%	16.0%	100.0%

#### 4-2c PERCENTAGE OF TOTAL COMMUNITIES OWNED (BY LARGEST 10, 25, 50)

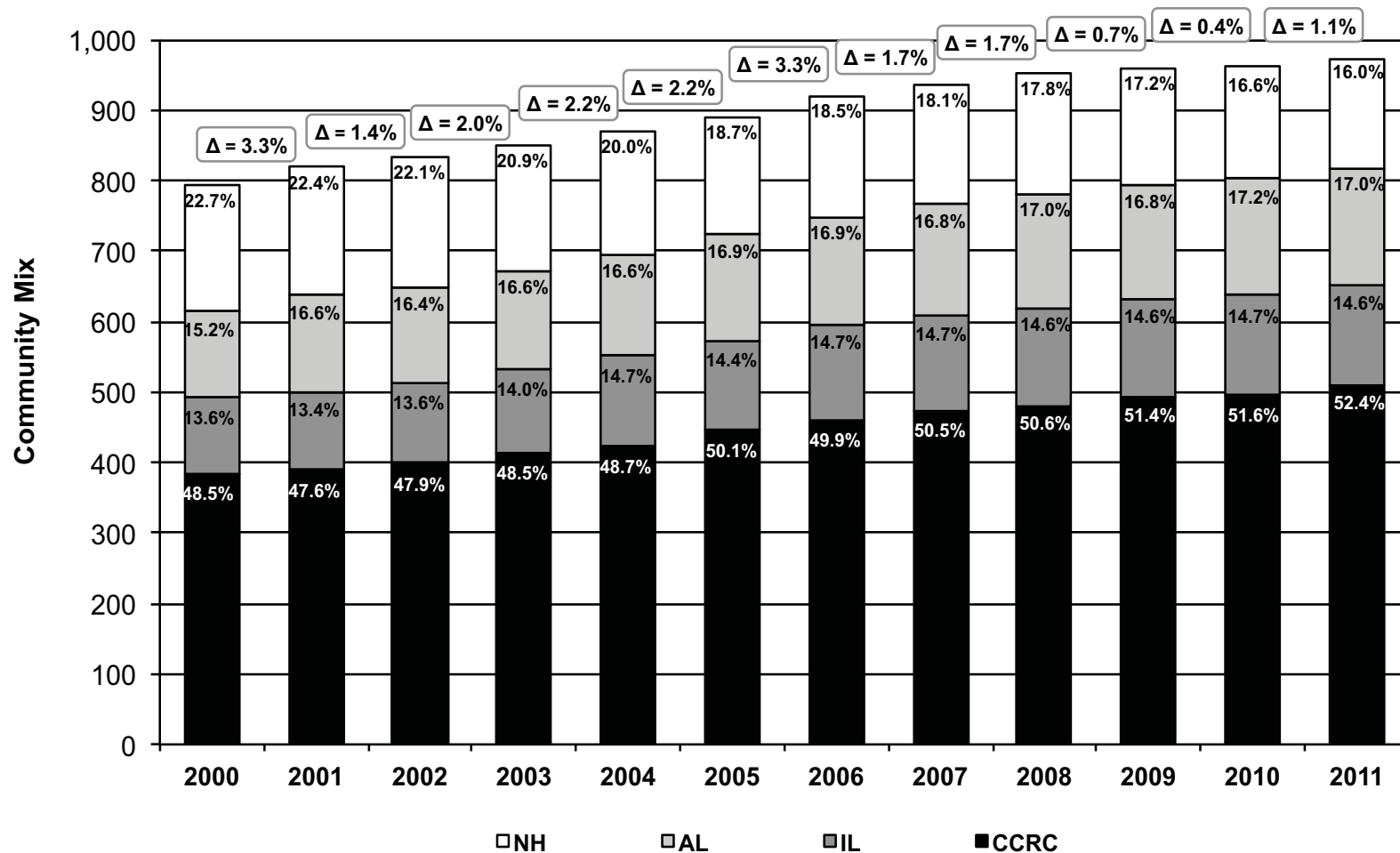




## 4-2 2012 LeadingAge Ziegler 100

Analysis of the Data: Communities

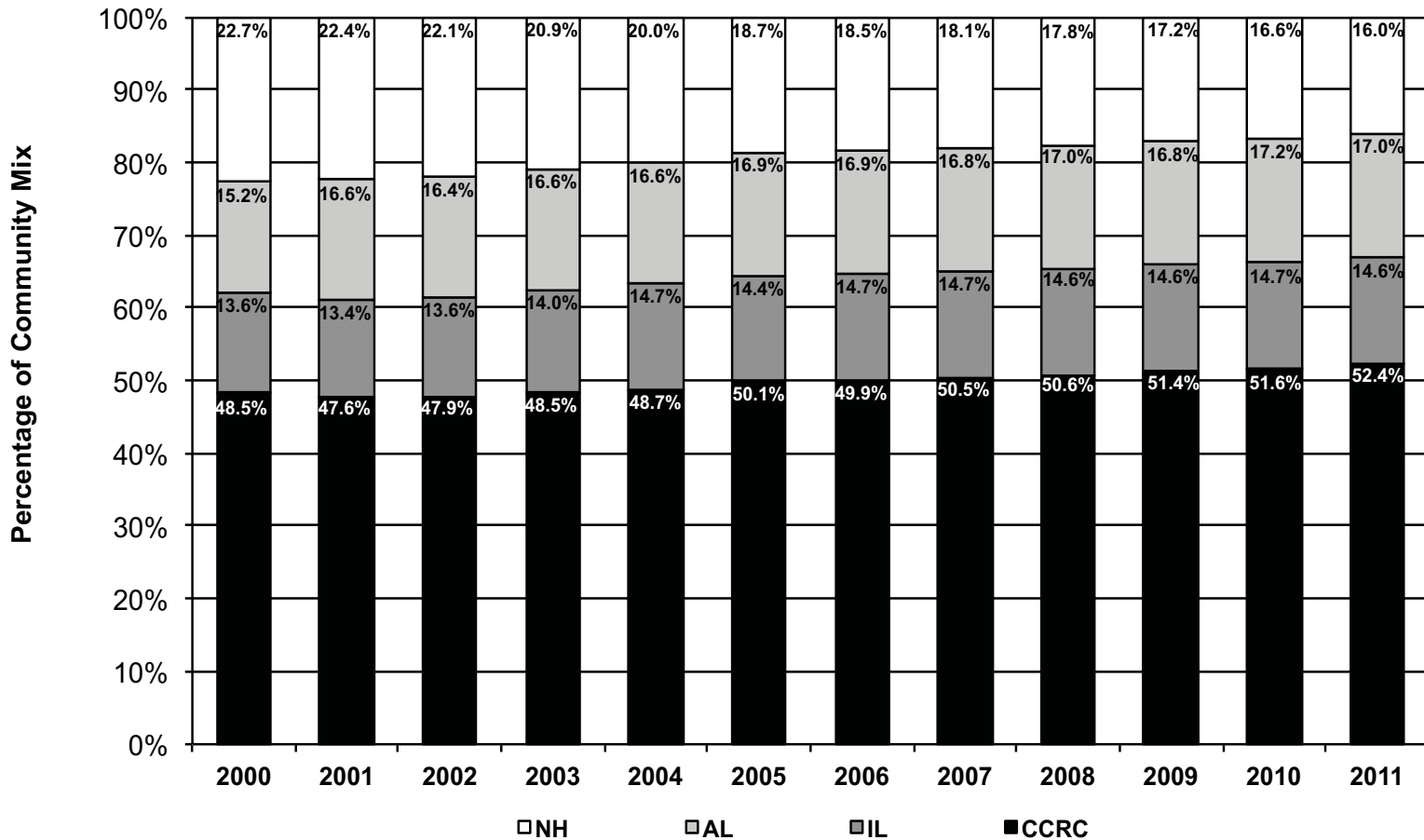
4-2d TOTAL COMMUNITY MIX BY YEAR, BY TOTAL COMMUNITIES,  
2000 THROUGH 2011, FOR 2012 LZ 100



## 4-2 2012 LeadingAge Ziegler 100

Analysis of the Data: Communities

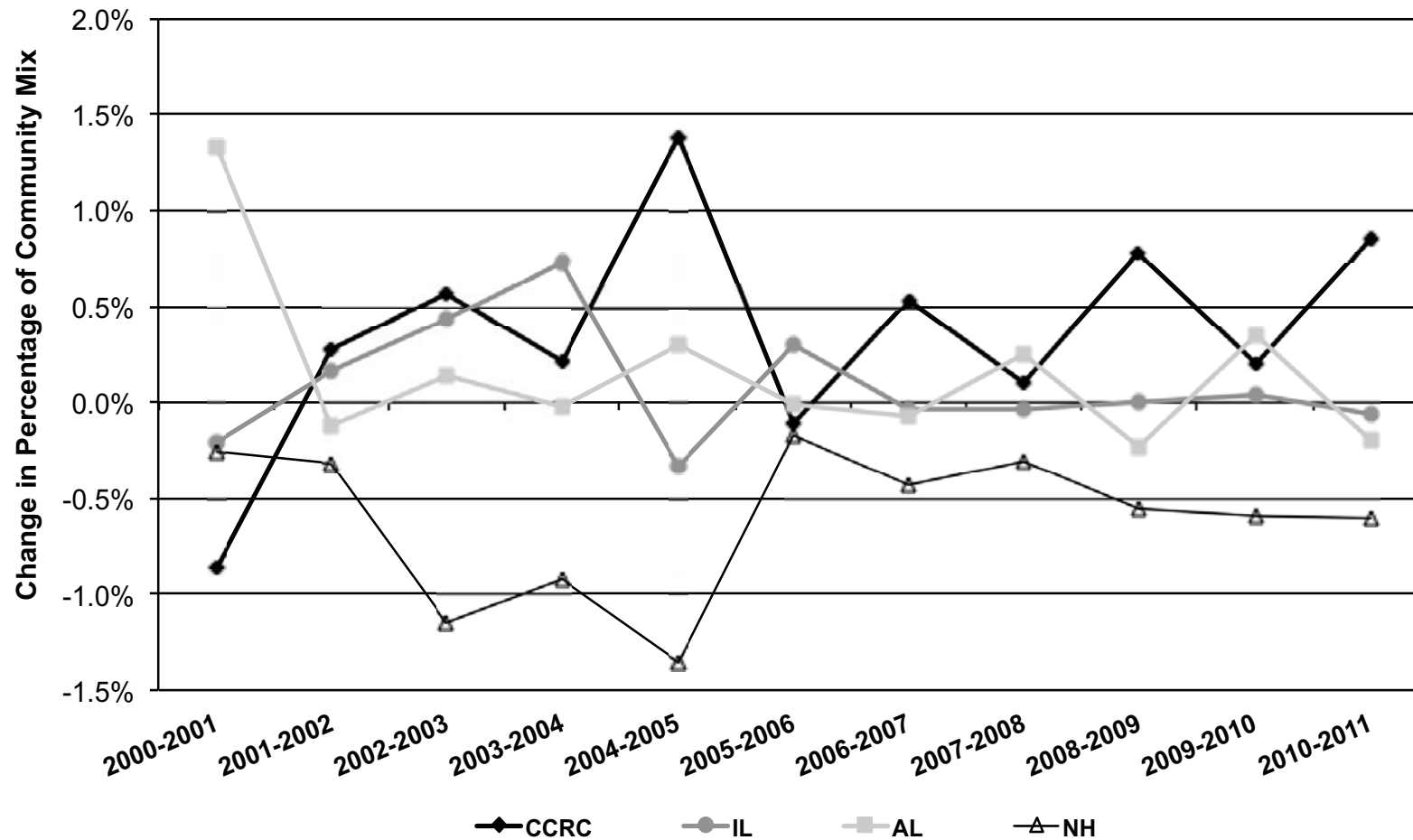
4-2e TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2011, FOR 2012 LZ 100



## 4-2 2012 LeadingAge Ziegler 100

Analysis of the Data: Communities

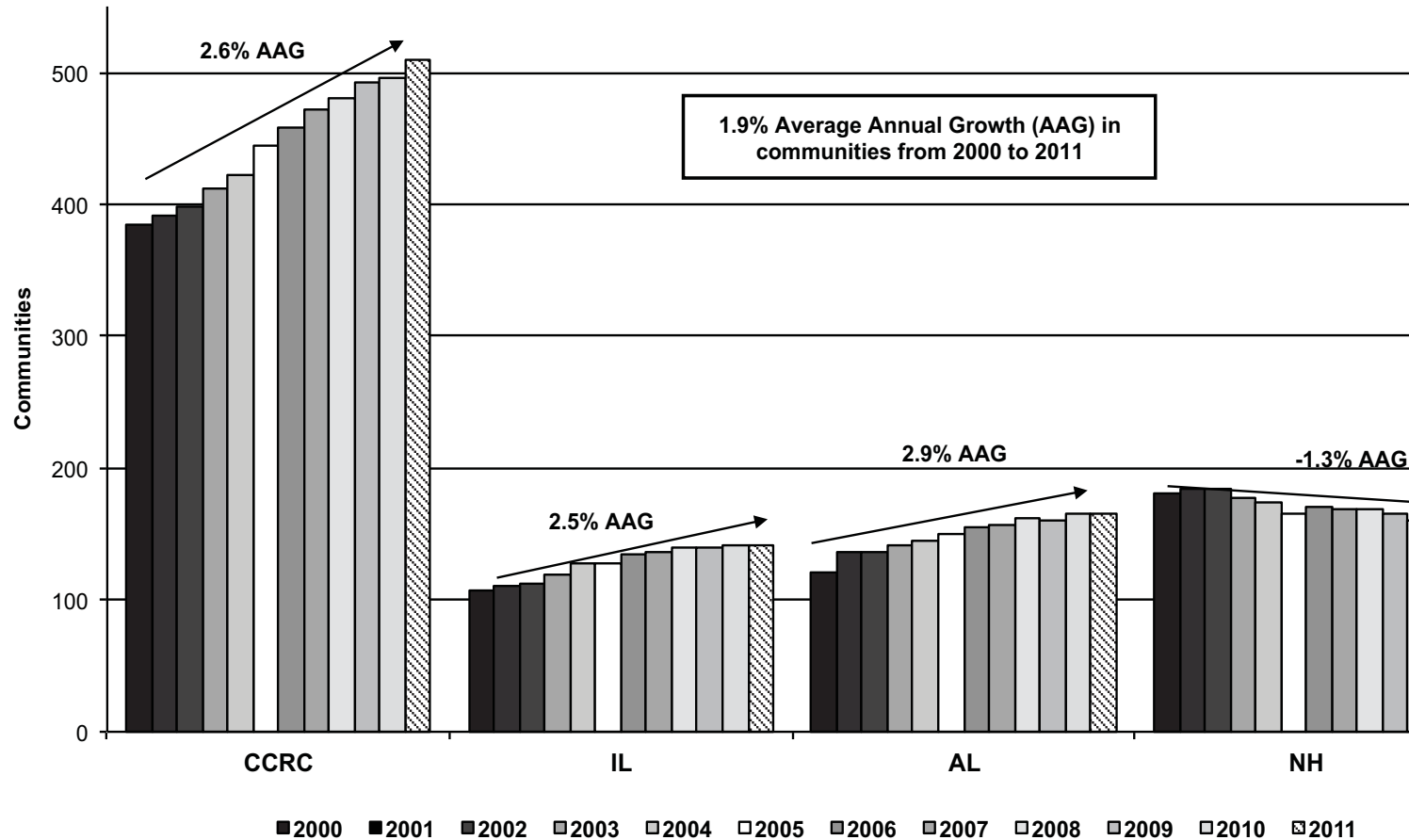
4-2f YEAR OVER YEAR CHANGE IN PERCENTAGE OF COMMUNITY MIX, FOR 2012 LZ 100



## 4-2 2012 LeadingAge Ziegler 100

Analysis of the Data: Communities

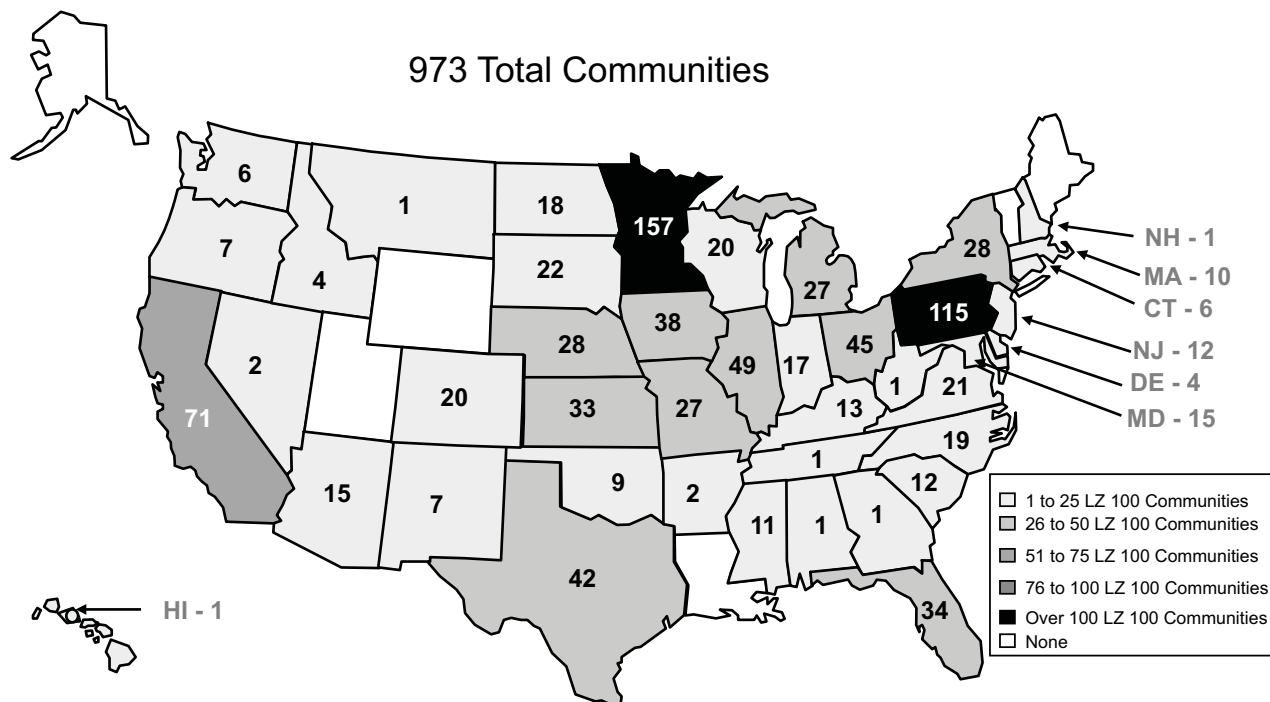
4-2g COMMUNITY TYPE COMPARISON, BY COMMUNITY, 2000 THROUGH 2011, FOR 2012 LZ 100



## 4-3 2012 LeadingAge Ziegler 100

### Analysis of the Data: Locations

#### 4-3a COMMUNITY LOCATIONS



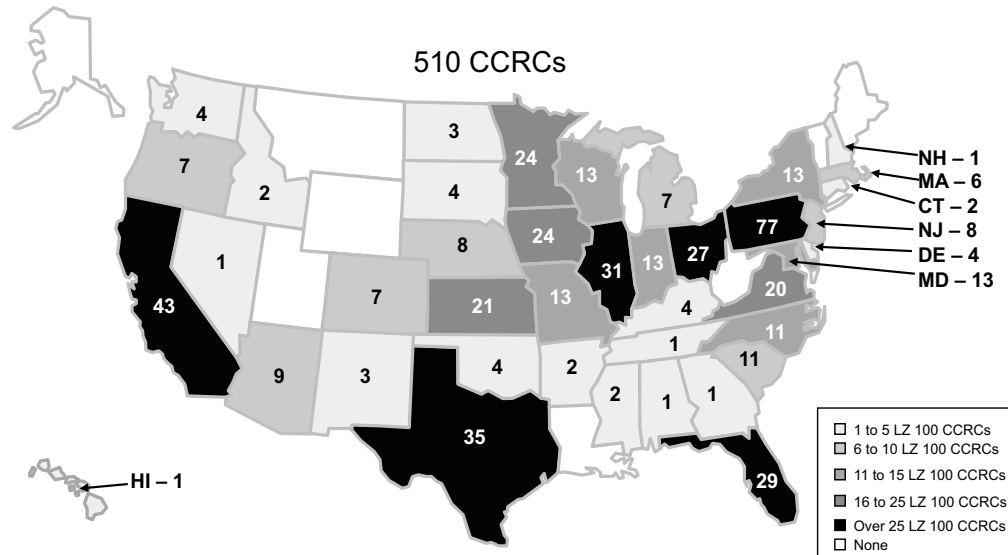
#### 4-3b TOP FIVE STATES BY COMMUNITY TYPE

CCRC			IL			AL			NH			AFFORDABLE HSG		
1	PA	77	1	MN	38	1	MN	52	1	MN	43	1	CA	98
2	CA	43	2	PA	15	2	CA, PA	14	2	OH	12	2	PA	76
3	TX	35	3	CA, MI	10	3	NE	11	3	IA	10	3	OH	65
4	IL	31	4	IL	8	4	ND	9	4	PA	9	4	TX	61
5	FL	29	5	MI, MO	7	5	SD	8	5	KS, NE	8	5	FL, NJ, MI	36

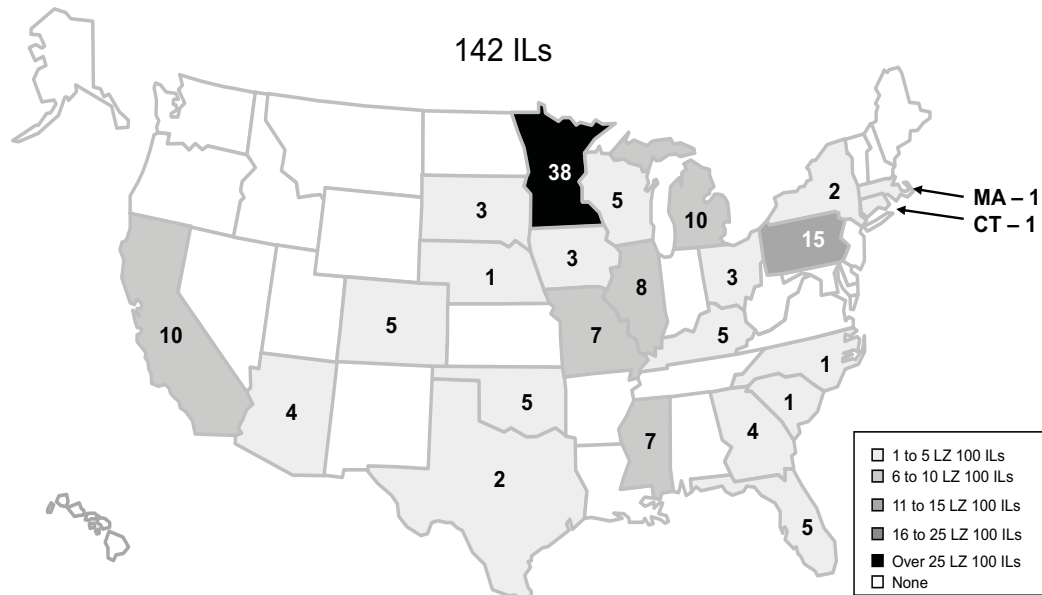
## 4-3 2012 LeadingAge Ziegler 100

### Analysis of the Data: Locations

#### 4-3c CONTINUING CARE RETIREMENT COMMUNITY (CCRC) LOCATIONS



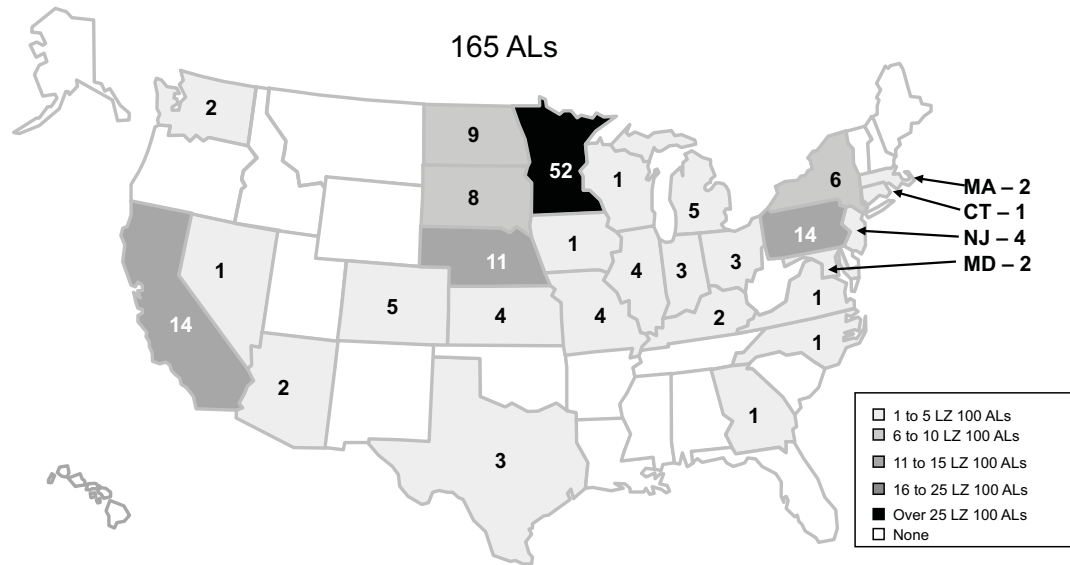
#### 4-3d INDEPENDENT LIVING (IL) COMMUNITY LOCATIONS



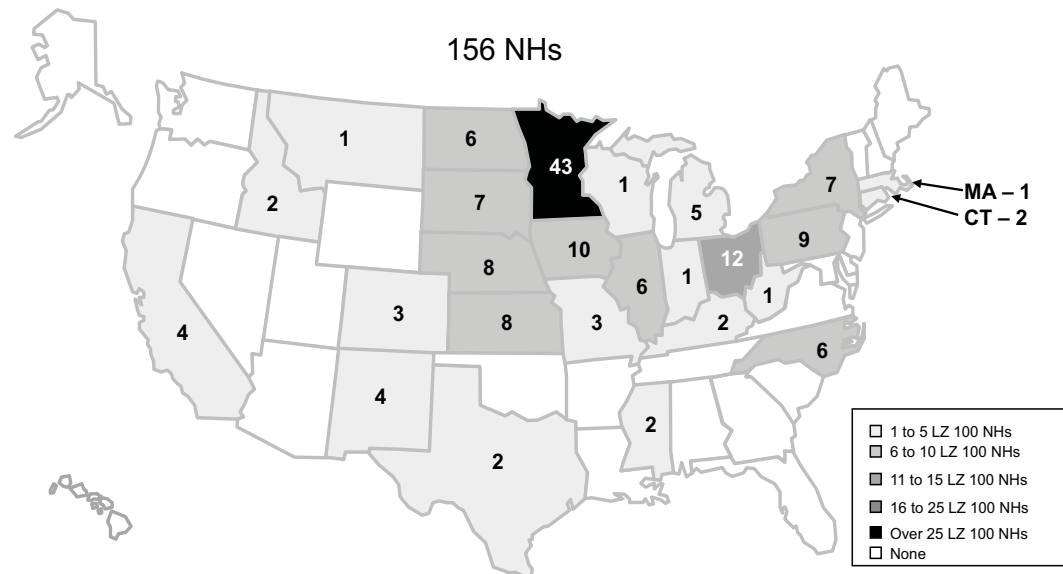
## 4-3 2012 LeadingAge Ziegler 100

Analysis of the Data: Locations

### 4-3e ASSISTED LIVING (AL) COMMUNITY LOCATIONS



### 4-3f NURSING HOME (NH) LOCATIONS

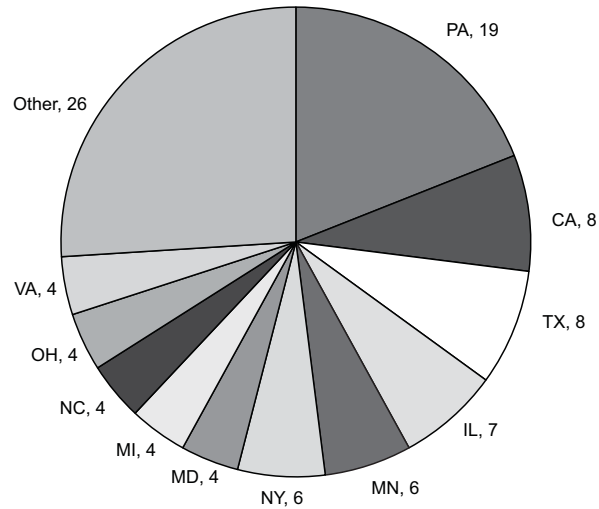




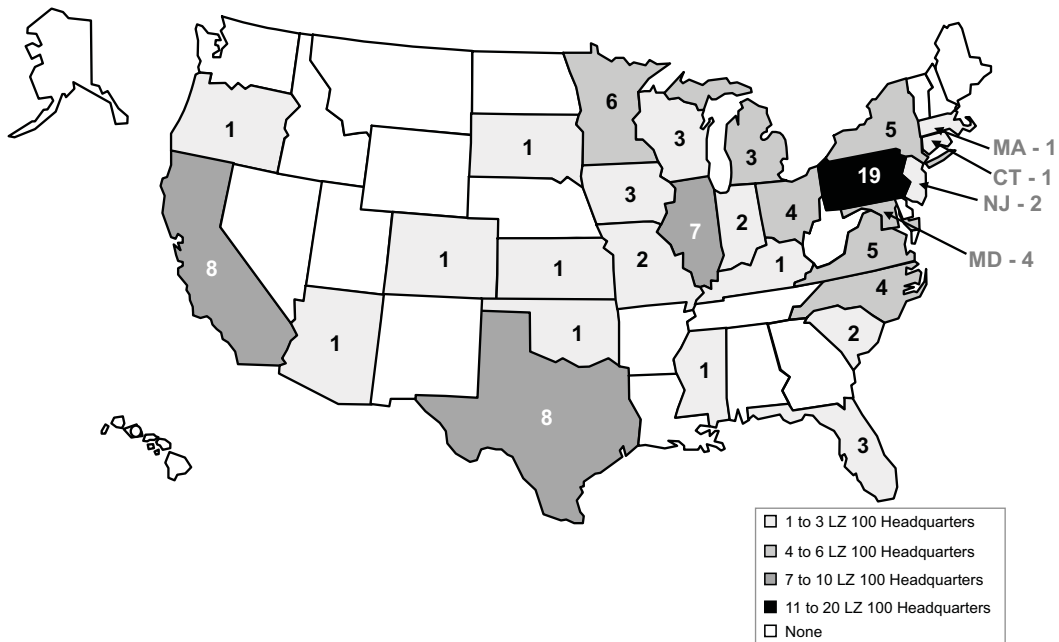
## 4-4 2012 LeadingAge Ziegler 100

Analysis of the Data: System Headquarters

### 4-4a STATES WITH LARGEST NUMBER OF HEADQUARTERS' LOCATIONS



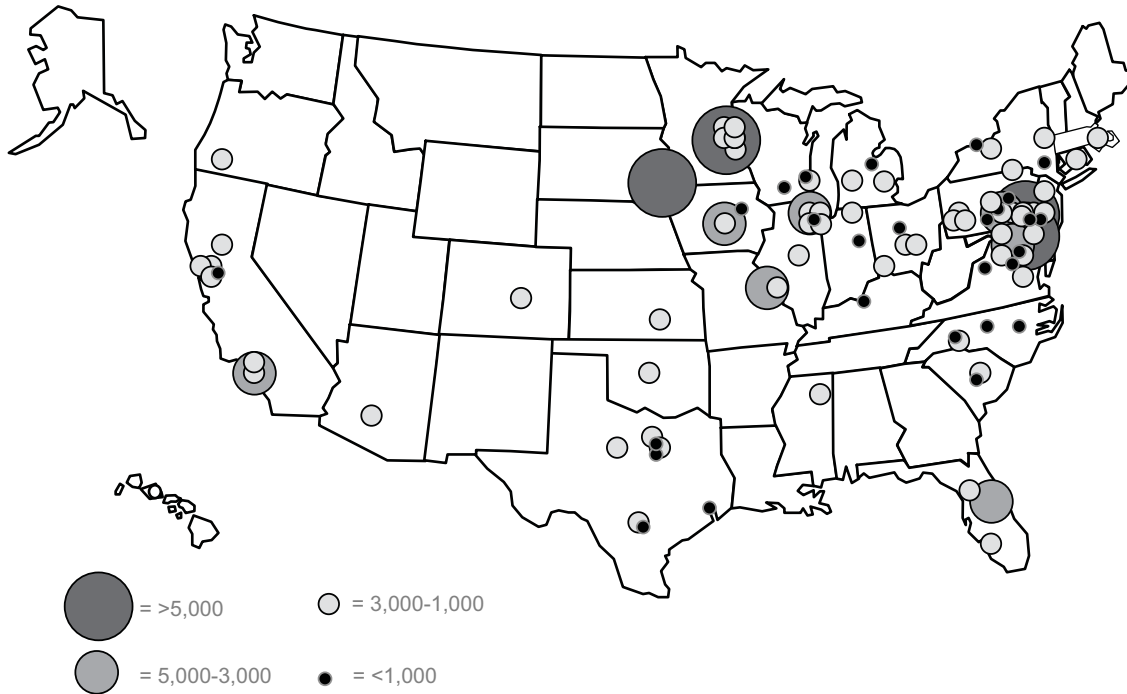
### 4-4b HEADQUARTER LOCATIONS



## 4-4 2012 LeadingAge Ziegler 100

Analysis of the Data: System Headquarters

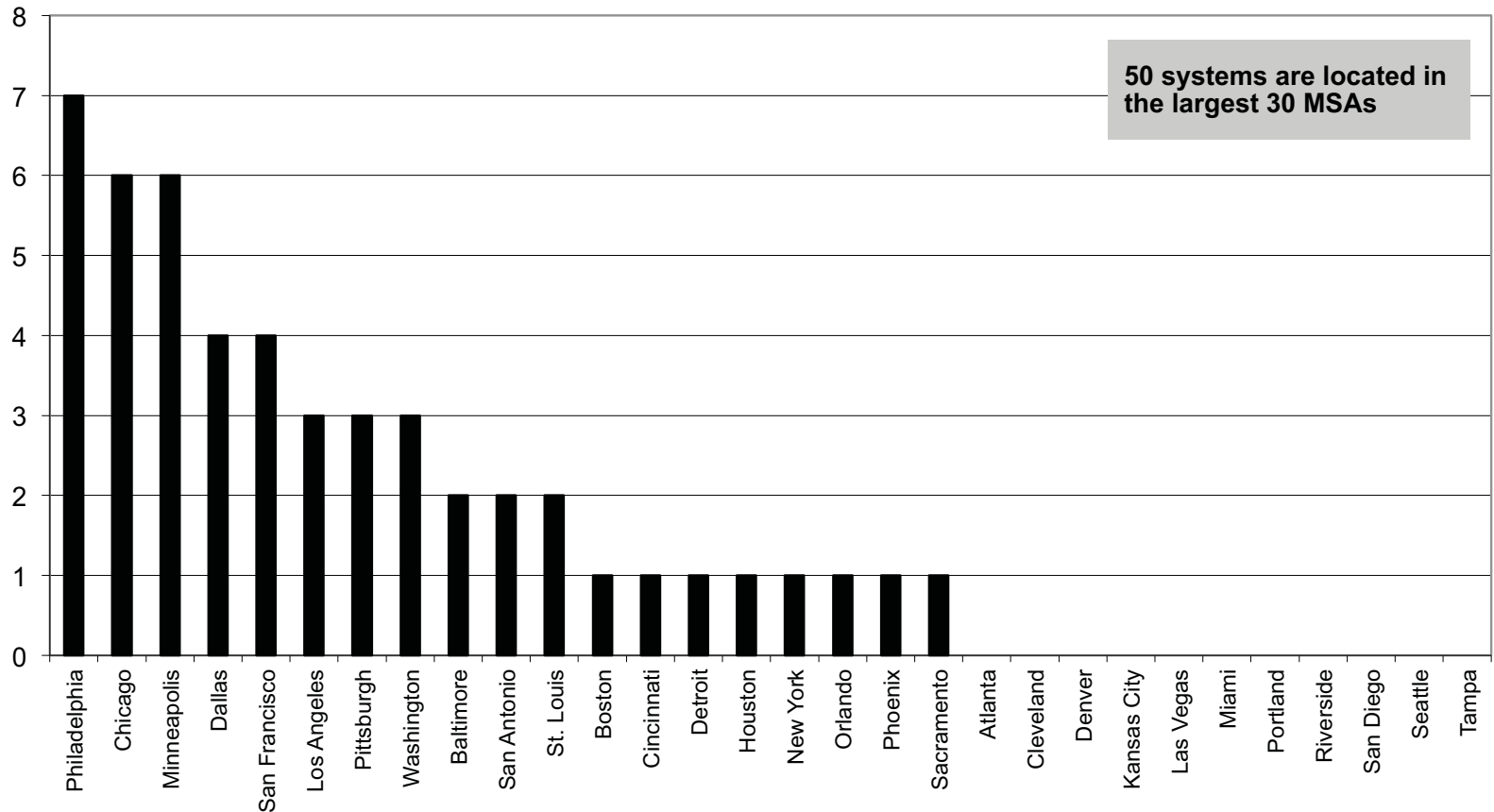
### 4-4c HEADQUARTER LOCATION BY SIZE



## 4-5 2012 LeadingAge Ziegler 100

Analysis of the Data: Metropolitan Statistical Areas (MSAs)

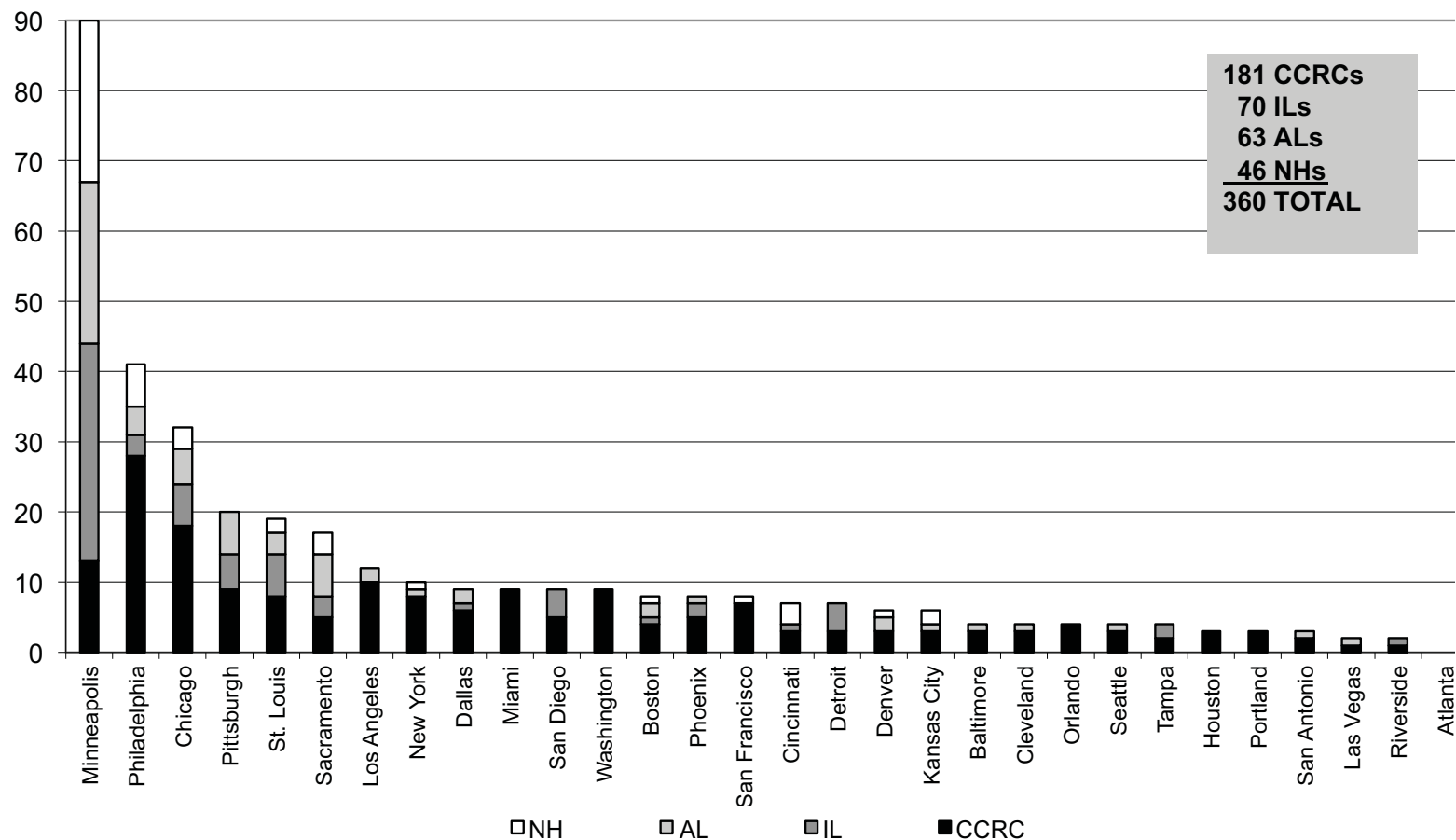
### 4-5a NUMBER OF HEADQUARTERS LOCATED IN THE LARGEST 30 MSAs



## 4-5 2012 LeadingAge Ziegler 100

Analysis of the Data: Metropolitan Statistical Areas (MSAs)

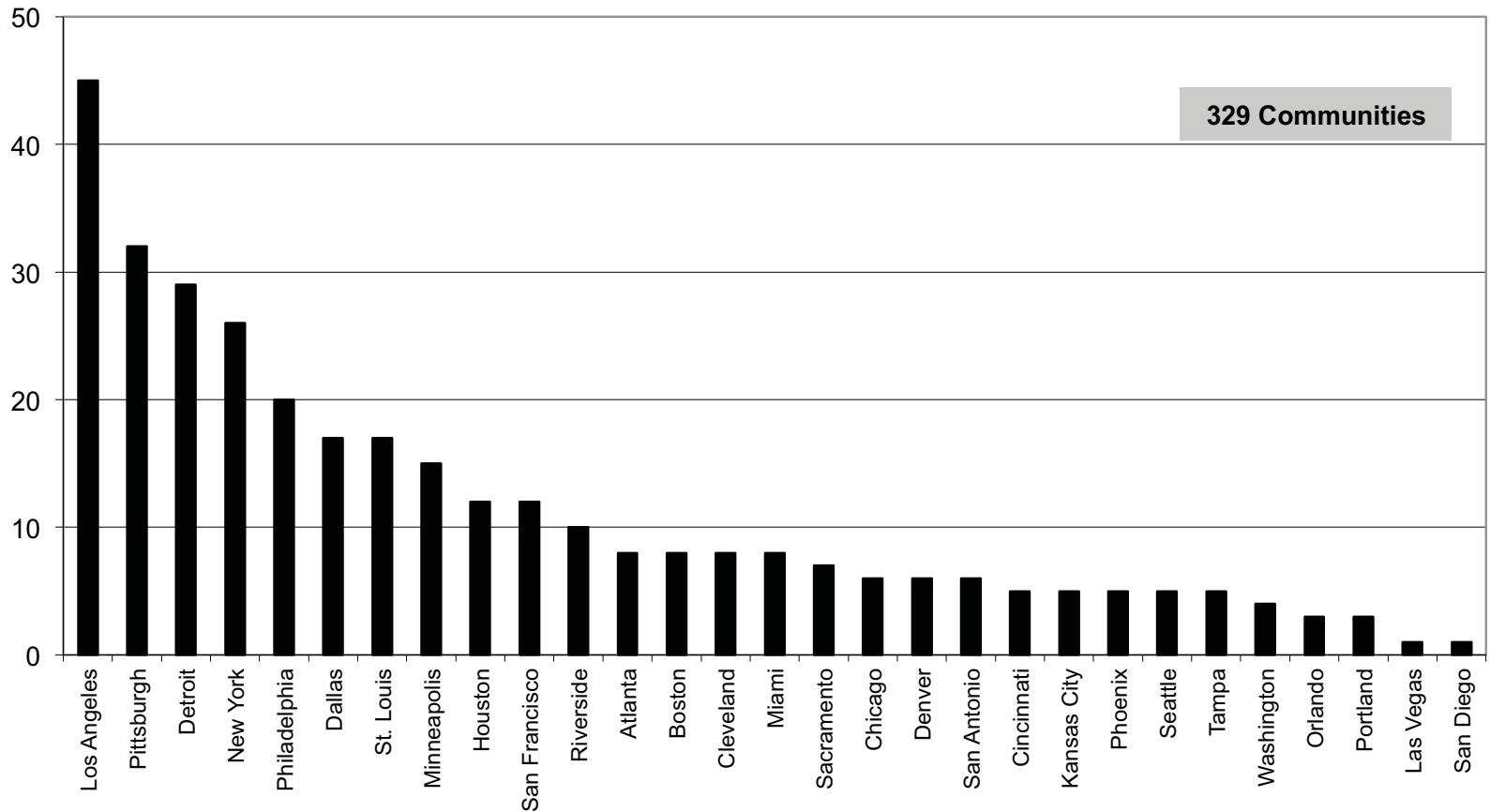
### 4-5b NUMBER OF COMMUNITIES LOCATED IN THE LARGEST 30 MSAs BY TYPE



## 4-5 2012 LeadingAge Ziegler 100

Analysis of the Data: Metropolitan Statistical Areas (MSAs)

### 4-5c NUMBER OF AFFORDABLE HOUSING COMMUNITIES LOCATED IN THE LARGEST 30 MSAs



## 4-6 2012 LeadingAge Ziegler 100

### Analysis of the Data: Classifications

#### 4-6a 2012 RANK, DETAILED BY CLASSIFICATION

2012 Rank	System Name	State	Classification	
			Primary	Secondary
1	Evangelical Lutheran Good Samaritan Society	SD	National	none
2	National Senior Campuses	MD	National	Across states
3	ACTS Retirement-Life Communities, Inc.	PA	National	Across states
4	Presbyterian Homes and Services	MN	Tri-state	Single state
5	Covenant Retirement Communities	IL	National	none
6	Retirement Housing Foundation	CA	National	Single state
7	Lifespace Communities, Inc.	IA	National	none
8	Westminster Communities of Florida	FL	Single state	none
9	Lutheran Senior Services	MO	Bi-state	Metropolitan
10	The Kendal Corporation	PA	National	none
11	Presbyterian Senior Living	PA	Across states	Single state
12	Cornerstone Affiliates	CA	Across states	Single state
13	Pacific Retirement Services, Inc.	OR	National	Single state
14	Ohio Presbyterian Retirement Services	OH	Single state	none
15	Asbury Communities	MD	National	Bi-state
16	Christian Homes, Inc.	IL	Across states	Single state
17	Ecumen	MN	Tri-state	Single state
18	Front Porch	CA	Single state	none
19	Diakon Lutheran Social Ministries	PA	Bi-state	Single state
20	Presbyterian Manors of Mid-America	KS	Bi-state	Single state
21	Volunteers of America	VA	National	none
22	Franciscan Communities	IL	Across states	Metropolitan
23	Masonic Villages	PA	Single state	none
24	Willow Valley Retirement Communities	PA	Metropolitan	none
25	Providence Life Services	IL	Bi-state	Metropolitan

## 4-6 2012 LeadingAge Ziegler 100

### Analysis of the Data: Classifications

#### 4-6a 2012 RANK, DETAILED BY CLASSIFICATION

2012 Rank	System Name	State	Classification	
			Primary	Secondary
26	Augustana Care Corporation	MN	Bi-state	Metropolitan
27	Shell Point	FL	Single state	State region
28	Christian Care Companies	AZ	Single state	Metropolitan
29	Elim Care	MN	Tri-state	Metropolitan
30	Otterbein Senior Lifestyle Choices	OH	Single state	State region
31	Springpoint Senior Living	NJ	Single state	State region
32	be.group	CA	Bi-state	State region
33	Loretto (Catholic Charities, Diocese of Syracuse)	NY	State region	Metropolitan
34	Hebrew SeniorLife	MA	Metropolitan	none
35	Homewood Retirement Centers	MD	Tri-state	none
36	Senior Quality Lifestyles Corporation	TX	Single State	none
37	Eskaton	CA	State region	Metropolitan
38	National Church Residences	OH	National	Single state
39	Bethesda Health Group, Inc.	MO	Metropolitan	Sub-metropolitan
40	Episcopal Senior Communities	CA	State region	none
41	Holland Home	MI	Metropolitan	none
42	Buckner Retirement Services, Inc.	TX	Single state	none
43	Presbyterian Homes	IL	Metropolitan	Sub-metropolitan
44	Greencroft	IN	Bi-State	State region
45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	Metropolitan	none
46	Concordia Lutheran Ministries	PA	Metropolitan	none
47	Mississippi Methodist Senior Services	MS	Single state	none
48	WesleyLife	IA	State region	none
49	SantaFe Senior Living	FL	Single state	none
50	Lutheran Life Communities	IL	Bi-state	Metropolitan

## 4-6 2012 LeadingAge Ziegler 100

### Analysis of the Data: Classifications

#### 4-6a 2012 RANK, DETAILED BY CLASSIFICATION

2012 Rank	System Name	State	Classification	
			Primary	Secondary
51	Lutheran Services for the Aging	NC	State region	none
52	Masonicare	CT	Single state	none
53	Baptist Village Retirement Communities of Oklahoma	OK	Single state	none
54	The Eddy	NY	Metropolitan	none
55	Bethesda Senior Living Communities	CO	National	none
56	Virginia Baptist Homes	VA	State region	none
57	Phoebe Ministries	PA	State region	none
58	Virginia United Methodist Homes, Inc.	VA	Single state	none
59	American Baptist Homes of the Midwest	MN	Across states	none
60	Lutheran SeniorLife	PA	Metropolitan	none
61	EMA, Inc.	MD	State region	none
62	Lutheran Social Services of South Central Pennsylvania	PA	State region	none
63	Sears Methodist Retirement System, Inc.	TX	Single state	none
64	Air Force Villages	TX	Sub-metropolitan	none
65	Northern California Presbyterian Homes and Services	CA	State region	Metropolitan
66	Presbyterian SeniorCare	PA	State region	Metropolitan
67	United Methodist Homes	NY	Bi-state	State region
68	Presbyterian Villages of Michigan	MI	Single state	Metropolitan
69	Lutheran Homes of South Carolina	SC	Single state	none
70	Walker Methodist	MN	Metropolitan	none
71	United Methodist Homes of New Jersey	NJ	Single state	none
72	Wesley Enhanced Living	PA	State region	Metropolitan
73	VMP	WI	Metropolitan	none
74	Elant	NY	State region	none
75	United Church Homes	OH	National	Single state



## 4-6 2012 LeadingAge Ziegler 100

### Analysis of the Data: Classifications

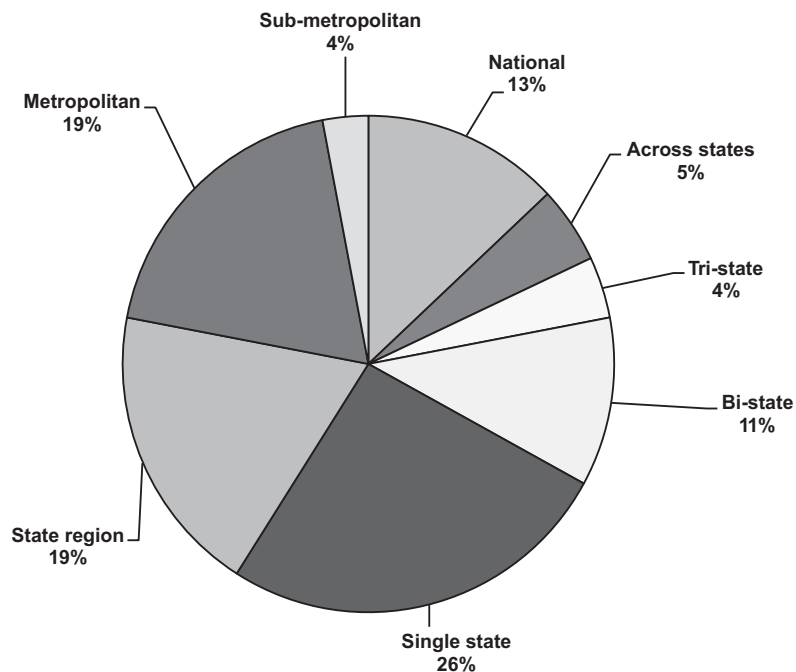
#### 4-6a 2012 RANK, DETAILED BY CLASSIFICATION

2012 Rank	System Name	State	Classification	
			Primary	Secondary
76	Menno Haven	PA	Metropolitan	<i>none</i>
77	Presby's Inspired Life	PA	Metropolitan	<i>none</i>
78	The Presbyterian Homes, Inc. of North Carolina	NC	State region	<i>none</i>
79	United Church Homes & Services	NC	Bi-state	Single state
80	United Methodist Retirement Homes, Inc.	NC	Single state	<i>none</i>
81	Methodist Retirement Communities and Affiliates	TX	State region	<i>none</i>
82	Lutheran Homes of Michigan	MI	Single state	State region
83	St. Ann's Community	NY	Metropolitan	<i>none</i>
84	Christian Care Centers	TX	State region	<i>none</i>
85	United Methodist Memorial Home	IN	State region	<i>none</i>
86	Mather LifeWays	IL	Bi-state	Sub-metropolitan
87	Oakwood Lutheran Senior Ministries	WI	Metropolitan	<i>none</i>
88	Cedar Community	WI	State region	Sub-metropolitan
89	Presbyterian Communities and Services	TX	Metropolitan	<i>none</i>
90	Simpson Senior Services	PA	Metropolitan	<i>none</i>
91	Presbyterian Communities of South Carolina	SC	Single state	<i>none</i>
92	Goodwin House Incorporated	VA	Sub-metropolitan	<i>none</i>
93	Living Branches	PA	Metropolitan	<i>none</i>
94	Garden Spot Village	PA	Single state	<i>none</i>
95	LutherCare	PA	State region	<i>none</i>
96	Elder Care Alliance	CA	Single state	Metropolitan
97	Christian Care Communities	KY	Single state	<i>none</i>
98	Morningside Ministries	TX	Sub-metropolitan	<i>none</i>
99	Sunnyside Communities	VA	Single state	<i>none</i>
100	Western Home Communities	IA	Metropolitan	<i>none</i>

## 4-6 2012 LeadingAge Ziegler 100

### Analysis of the Data: Classifications

#### 4-6b PRIMARY CLASSIFICATIONS







#### 4-6c SECONDARY CLASSIFICATIONS

Primary Classification	Secondary Classification	# Organizations
National	Across states	2
	Bi-state	1
	Single state	4
Across States	Single state	3
	Metropolitan	1
Tri-state	Single state	2
	Metropolitan	1
Bi-state	Single state	3
	State region	3
	Metropolitan	4
	Sub-metropolitan	1
Single state	State region	4
	Metropolitan	3
State region	Metropolitan	5
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
<b>Total Organizations</b>		<b>40</b>

## 4-7 2012 LeadingAge Ziegler 100

### Analysis of the Data: Corporate Name Changes

2012 Rank	Current System Name & Logo	Previous System Name
30		Otterbein Retirement Living Communities
32		Southern California Presbyterian Homes
73		The Village at Manor Park
87		Oakwood Village Retirement Communities

## 4-8 2012 LeadingAge Ziegler 100

### Analysis of the Data: Debt Ratings

#### 4-8a LZ 100 WITH RATED DEBT

2012 Rank	System Name	State	Rated	
			S&P	Fitch
23	Masonic Villages	PA	A	NR
46	Concordia Lutheran Ministries	PA	A	NR
7	Lifespace Communities, Inc.	IA	NR	A
42	Buckner Retirement Services, Inc.	TX	A-	A
24	Willow Valley Retirement Communities	PA	A-	A-
1	Evangelical Lutheran Good Samaritan Society	SD	A-	NR
30	Otterbein Senior Lifestyle Choices	OH	A-	NR
8	Westminster Communities of Florida	FL	NR	A-
39	Bethesda Health Group, Inc.	MO	NR	A-
3	ACTS Retirement-Life Communities, Inc.	PA	BBB+	A-
11	Presbyterian Senior Living	PA	BBB+	NR
40	Episcopal Senior Communities	CA	BBB+	NR
9	Lutheran Senior Services	MO	NR	BBB+
19	Diakon Lutheran Social Ministries	PA	NR	BBB+
31	Springpoint Senior Living	NJ	NR	BBB+
12	Cornerstone Affiliates	CA	BBB	BBB+
14	Ohio Presbyterian Retirement Services	OH	BBB	NR
18	Front Porch	CA	BBB	NR
32	be.group	CA	BBB	NR
37	Eskaton	CA	BBB	NR
52	Masonicare	CT	BBB	NR
65	Northern California Presbyterian Homes and Services	CA	BBB	NR
94	Garden Spot Village	PA	BBB	NR
97	Christian Care Communities	KY	BBB	NR
64	Air Force Villages	TX	NR	BBB
92	Goodwin House Incorporated	VA	NR	BBB

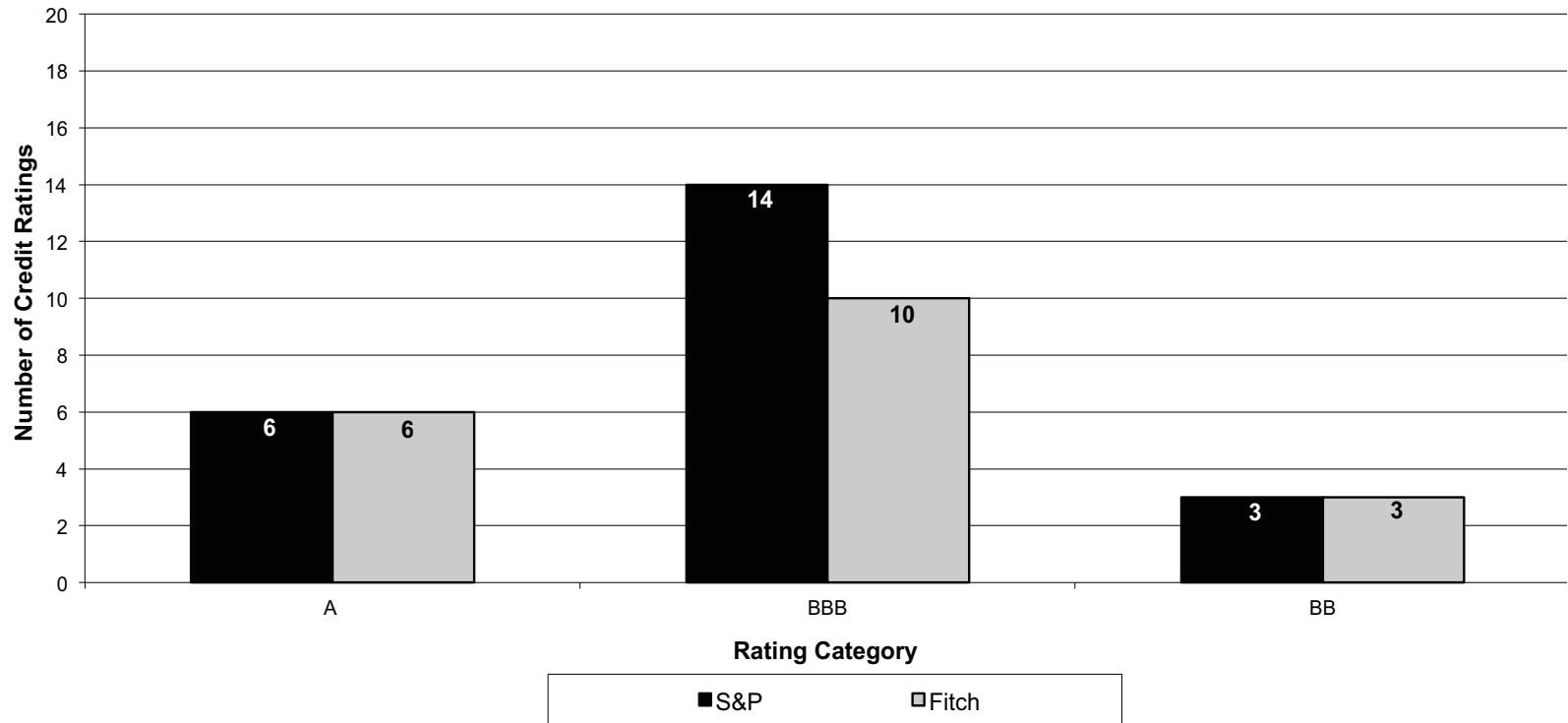
2012 Rank	System Name	State	Rated	
			S&P	Fitch
5	Covenant Retirement Communities	IL	BBB-	BBB+
84	Christian Care Centers	TX	BBB-	BBB-
15	Asbury Communities	MD	NR	BBB-
16	Christian Homes, Inc.	IL	NR	BBB-
71	United Methodist Homes of New Jersey	NJ	BB+	NR
41	Holland Home	MI	NR	BB+
68	Presbyterian Villages of Michigan	MI	NR	BB+
27	Shell Point	FL	BB	NR
72	Wesley Enhanced Living	PA	NR	BB
61	EMA, Inc.	MD	BB-	NR

Ratings shown reflect the ratings of the system's debt or the debt of an obligated group within the system. Systems with senior living communities that have obtained ratings on a particular individual community's or communities' credit strength, rather than on the credit strength of the multi-site or an obligated group within the multi-site, are not shown on the listing.

## 4-8 2012 LeadingAge Ziegler 100

### Analysis of the Data: Debt Ratings

#### 4-8b RATINGS BY CATEGORY



36 ratings in "A" & "BBB" Category  
 6 in "BB" Category  
 42 total ratings of debt for 36 organizations

## 4-9 2012 LeadingAge Ziegler 100

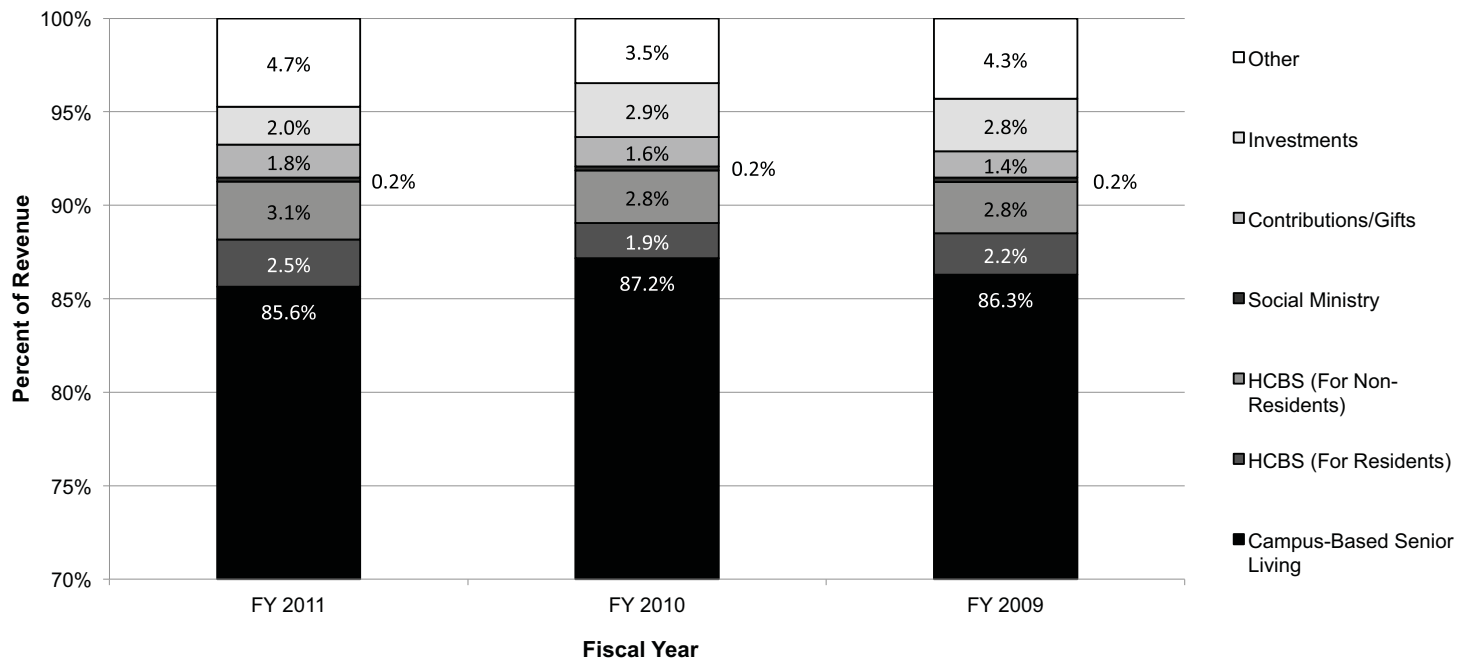
### Analysis of the Data: Revenues

#### 4-9a AVERAGE PERCENT MIX OF REVENUE, FISCAL YEAR 2011

2011 Analysis by Largest 10, 25, 50 & Total							
Largest	Campus-Based Senior Living	HCBS (For Residents)	HCBS (For Non-Residents)	Social Ministry	Contributions / Gifts	Investments	Other*
10	89.2%	5.5%	1.1%	0.2%	1.1%	1.0%	1.8%
25	86.4%	5.1%	1.3%	0.6%	1.1%	2.3%	3.2%
50	86.1%	4.0%	3.3%	0.4%	1.5%	2.2%	2.5%
100	85.6%	2.5%	3.1%	0.2%	1.8%	2.0%	4.7%

\* 'Other' includes revenues such as management & development fees, miscellaneous resident services, charity care, selling/leasing of land, etc.

#### 4-9b AVERAGE PERCENT MIX OF REVENUE, FISCAL YEAR 2009-2011

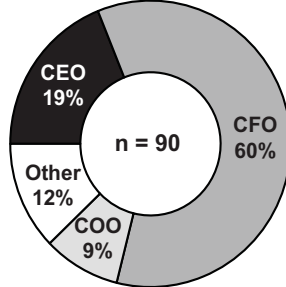


## 4-10 2012 LeadingAge Ziegler 100

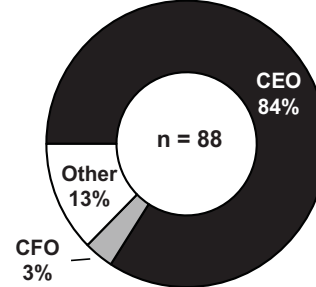
### Analysis of the Data: Corporate Structure

#### 4-10a 2012 LZ 100 CORPORATE LEVEL POSITIONS, BY AREA AND REPORTING EXECUTIVE

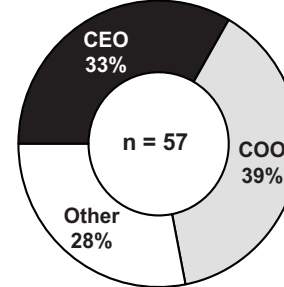
Information Technology



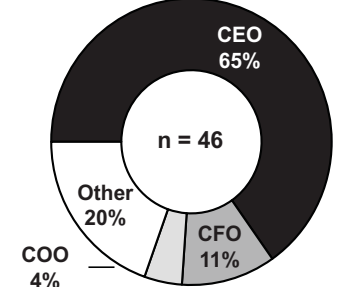
Fundraising



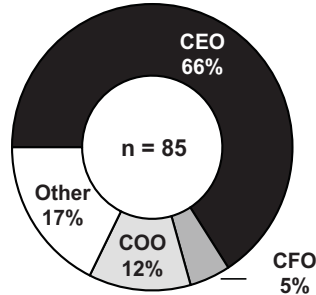
HCBS



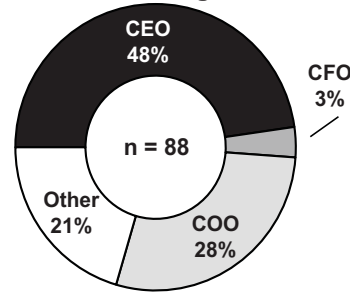
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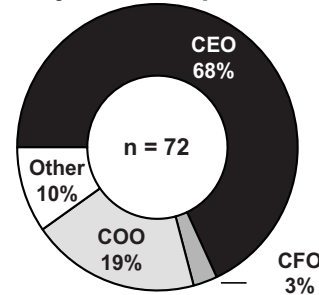
Human Resources



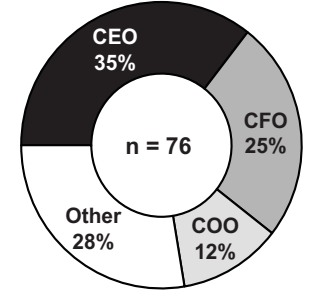
Marketing



Project Development



Risk Management

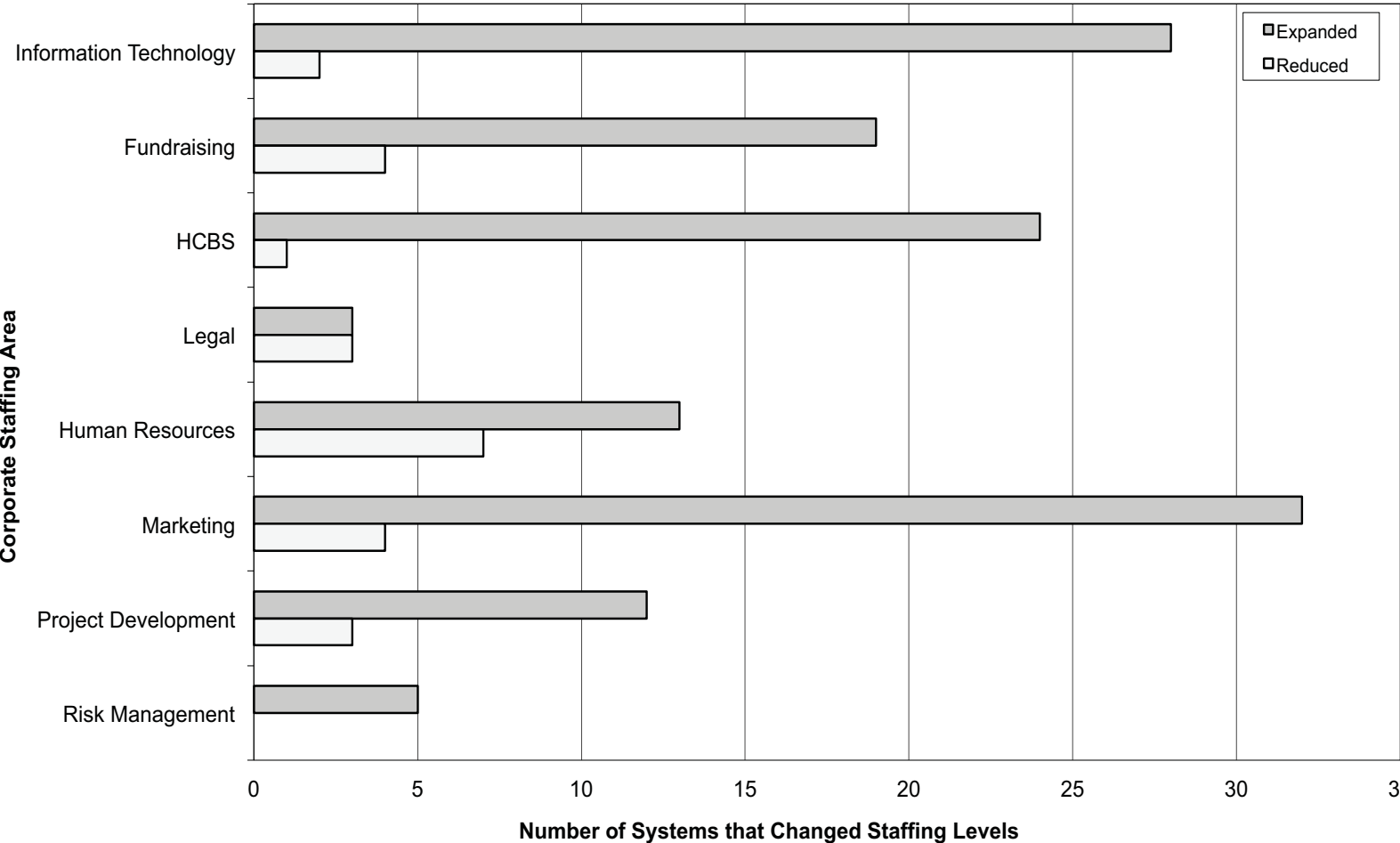


All 2012 LZ 100 systems (n = 100) responded to questions related to Corporate Level positions and to whom each position reports; individual n's represent the number of systems that have a position for each area.

# 4-10 2012 LeadingAge Ziegler 100

## Analysis of the Data: Corporate Structure

4-10b LZ 100 CHANGE IN CORPORATE STAFFING, BY AREA





## 4-11 2012 LeadingAge Ziegler 100

Analysis of the Data: CARF-CCAC Accreditation

### 4-11a LZ 100 WITH CARF-CCAC ACCREDITATION

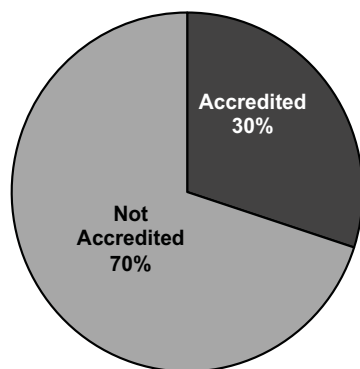
2012 Rank	System Name	State	# Accredited Communities
3	ACTS Retirement-Life Communities, Inc.	PA	21
5	Covenant Retirement Communities	IL	12
7	Lifespace Communities, Inc.	IA	10
10	The Kendal Corporation	PA	8
11	Presbyterian Senior Living	PA	9
12	Cornerstone Affiliates	CA	10
13	Pacific Retirement Services, Inc.	OR	6
14	Ohio Presbyterian Retirement Services	OH	9
15	Asbury Communities	MD	5
24	Willow Valley Retirement Communities	PA	3
27	Shell Point	FL	1
31	Springpoint Senior Living	NJ	5
34	Hebrew SeniorLife	MA	1
37	Eskaton	CA	1
38	National Church Residences	OH	1
40	Episcopal Senior Communities	CA	4
43	Presbyterian Homes	IL	3
44	Greencroft	IN	1
46	Concordia Lutheran Ministries	PA	4
51	Lutheran Services for the Aging	NC	1
52	Masonicare	CT	1
58	Virginia United Methodist Homes, Inc.	VA	5
61	EMA, Inc.	MD	3
64	Air Force Villages	TX	2
65	Northern California Presbyterian Homes and Services	CA	3
66	Presbyterian SeniorCare	PA	1
71	United Methodist Homes of New Jersey	NJ	2
76	Menno Haven	PA	2
78	The Presbyterian Homes, Inc. of North Carolina	NC	2
92	Goodwin House Incorporated	VA	2
<b>Total Accredited Communities</b>			<b>138</b>

Data obtained from CARF-CCAC. Information on CARF-CCAC accreditation can be obtained through the website: [www.carf.org/aging](http://www.carf.org/aging)

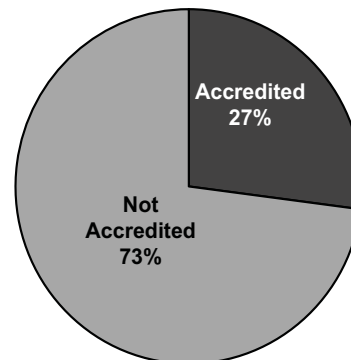
## 4-11 2012 LeadingAge Ziegler 100

### Analysis of the Data: CARF-CCAC Accreditation

#### 4-11b LZ 100 WITH AT LEAST ONE CARF-CCAC ACCREDITED COMMUNITY



#### 4-11c CARF-CCAC ACCREDITED COMMUNITIES AS A PERCENTAGE OF TOTAL CCRCs



#### SYSTEM CARF-CCAC ACCREDITATION (LARGEST 10, 25, 50, & TOTAL)

Largest	Systems with an Accredited Community	(%)
10	4	40%
25	10	40%
50	19	38%
100	30	30%

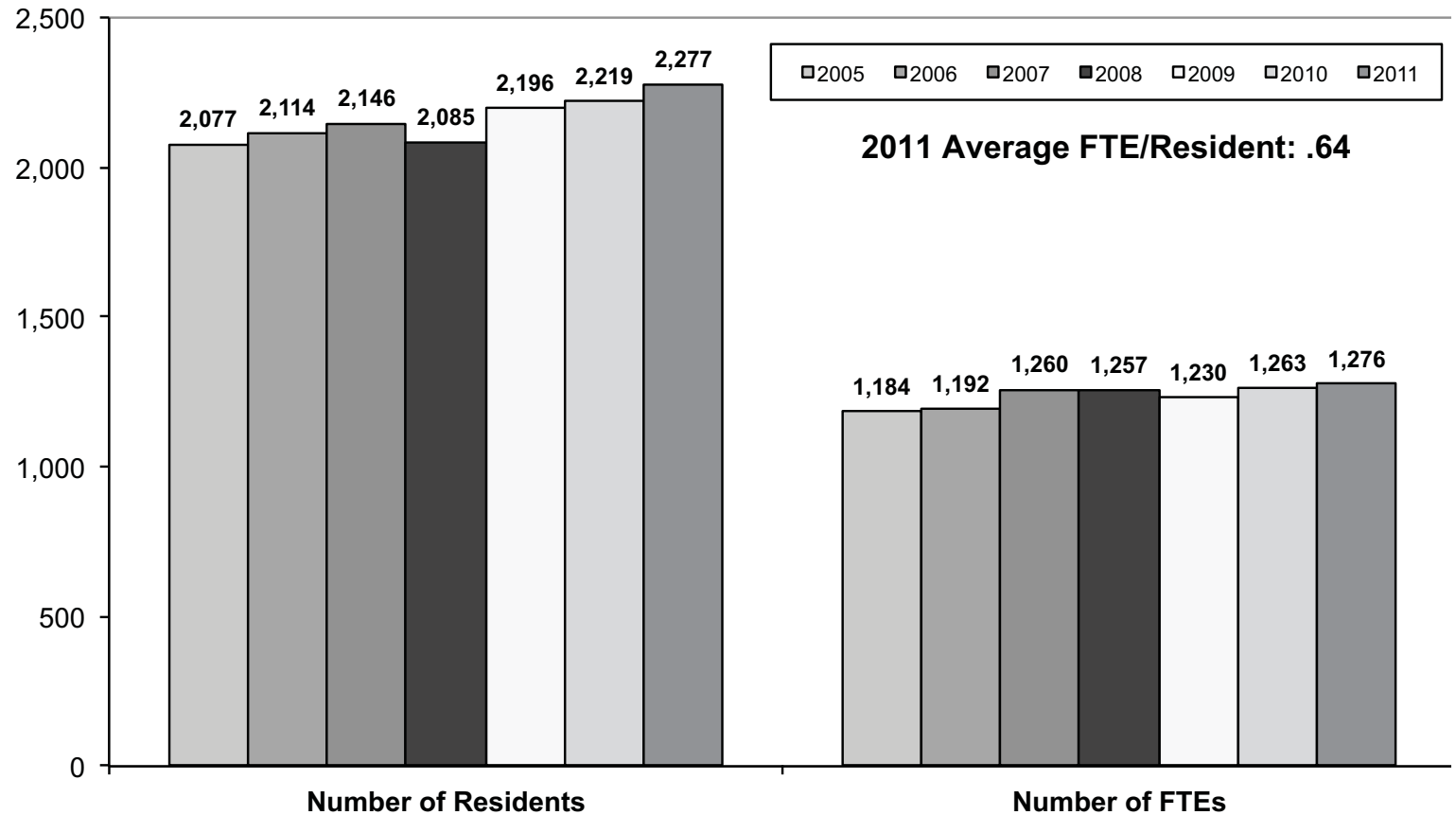
#### COMMUNITY CARF-CCAC ACCREDITATION (LARGEST 10, 25, 50, & TOTAL)

Top	Accredited Communities	CCRCs	(%)
10	51	189	27%
25	93	295	32%
50	114	376	30%
100	138	510	27%

## 4-12 2012 LeadingAge Ziegler 100

### Analysis of the Data: Residents & Staffing

#### 4-12a AVERAGE NUMBER OF RESIDENTS AND EMPLOYEES, 2005-2011



## 4-12 2012 LeadingAge Ziegler 100

### Analysis of the Data: Residents & Staffing

#### 4-12b SUMMARY OF RESIDENTS & UNITS, 2010-2011

Analysis by Largest 10, 25, 50 & Total							
Largest		Average Number of Residents		Average Number of Units		Average Resident / Unit	
		2011	2010	2011	2010	2011	2010
10		9,417	9,063	7,325	7,203	1.45	1.42
25	(n=24)	5,365	5,278	4,541	4,464	1.17	1.18
50	(n=48)	3,478	3,396	3,050	2,999	1.09	1.08
100	(n=94)	2,284	2,256	2,048	2,020	1.06	1.07

#### 4-12c SUMMARY OF RESIDENTS & EMPLOYEES, 2010-2011

Analysis by Largest 10, 25, 50 & Total							
Largest		Average Number of Residents		Average Number of FTEs		Average FTE / Resident	
		2011	2010	2011	2010	2011	2010
10		9,417	9,063	4,273	4,194	0.48	0.49
25	(n=24)	5,365	5,278	2,702	2,699	0.58	0.60
50	(n=48)	3,478	3,396	1,878	1,899	0.64	0.67
100	(n=94)	2,284	2,256	1,278	1,289	0.64	0.66

Analysis for 2012 AZ 100 by Year			
Year	Average Number of Residents	Average Number of FTEs	Average FTE / Resident
2009 avg FTE/resident n=97	2,196	1,230	0.65
2010 avg FTE/resident n=97	2,219	1,263	0.66
2011 avg FTE/resident n=96	2,277	1,276	0.64

## 4-12 2012 LeadingAge Ziegler 100

### Analysis of the Data: Residents & Staffing

#### 4-12d CORPORATE STAFFING CHANGES

2012 Rank	System Name	State	Current (2011)	Previous
<b>CEO</b>				
14	Ohio Presbyterian Retirement Services	OH	Laurence Gumina	David Kaasa
20	Presbyterian Manors of Mid-America	KS	Bruce Shogren	William Ward, Jr.
43	Presbyterian Homes	IL	Todd Swortzel	Peter Mulvey
64	Air Force Villages	TX	Loyd Utterback	Melvin Alkire
71	United Methodist Homes of New Jersey	NJ	Lawrence Carlson	James Batten
75	United Church Homes	OH	Kenneth Daniel	Brian Allen
<b>CFO</b>				
20	Presbyterian Manors of Mid-America	KS	Beverly Woodsmall	Bruce Shogren
22	Franciscan Communities	IL	Ronald Tinsley	Robert Zimmer
40	Episcopal Senior Communities	CA	Diana Jamison	William Tobin
64	Air Force Villages	TX	Brian Englund	Andre Hawkins
72	Wesley Enhanced Living	VA	Jeff Dunkle	Mike Prushan
83	St. Ann's Community	NY	Dennis Kant	William Remizowski
87	Oakwood Lutheran Senior Ministries	WI	Barbara Fraser	Gerald Kelm
<b>COO</b>				
8	Westminster Communities of Florida	FL	Garry Harris	Roger Stevens
17	Ecumen	MN	Gilbert Acevedo	Michael Finn
21	Volunteers of America	VA	Tom Turnbull	NONE
22	Franciscan Communities	IL	John Glover	Lora Ann Slawinski
31	Springpoint Senior Living	NJ	James Vaccaro	Charles Mooney
37	Eskaton	CA	Betsy Donovan	Trevor Hammond
43	Presbyterian Homes	IL	John Burns	NONE
51	Lutheran Services for the Aging	NC	Patrick Foley	Deborah Mathis
57	Phoebe Ministries	PA	Lisa Fichera	William Davies
63	Sears Methodist Retirement System	TX	Gary Anderson	NONE
64	Air Force Villages	TX	Fred Ryder	Lisa Skopal

#### 4-12e AVERAGE CORPORATE TENURES

Position	Average Tenure (years)	n*
<b>CEO**</b>	<b>9.57</b>	<b>99</b>
<b>CFO</b>	<b>7.71</b>	<b>97</b>
<b>COO</b>	<b>4.93</b>	<b>70</b>

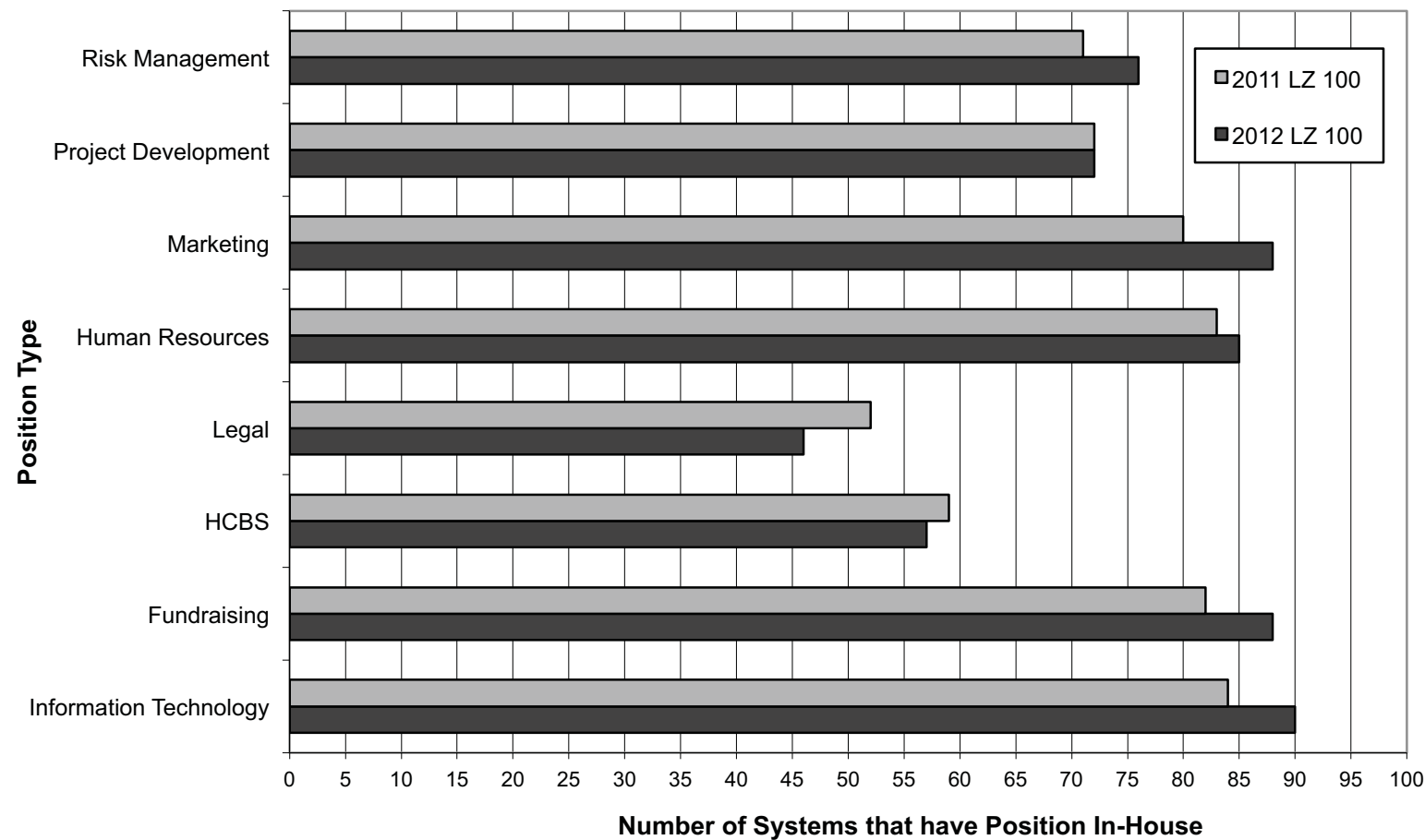
\* n represents the number of systems that have that position and the position is filled

\*\* 9 systems have CEOs who served on their organization's board prior to becoming CEO

# 4-12 2012 LeadingAge Ziegler 100

Analysis of the Data: Residents & Staffing

4-12f COMPARISON OF IN-HOUSE CORPORATE POSITIONS



## 4-13 2012 LeadingAge Ziegler 100

### Analysis of the Data: Foundings

#### 4-13a 2012 RANK, DETAILED BY YEAR FOUNDED

2012 Rank	System Name	State	Year Founded
9	Lutheran Senior Services	MO	1858
17	Ecumen	MN	1862
90	Simpson Senior Services	PA	1865
19	Diakon Lutheran Social Ministries	PA	1868
83	St. Ann's Community	NY	1873
46	Concordia Lutheran Ministries	PA	1881
23	Masonic Villages	PA	1884
5	Covenant Retirement Communities	IL	1886
97	Christian Care Communities	KY	1886
72	Wesley Enhanced Living	PA	1888
39	Bethesda Health Group, Inc.	MO	1889
52	Masonicare	CT	1889
41	Holland Home	MI	1892
50	Lutheran Life Communities	IL	1892
69	Lutheran Homes of South Carolina	SC	1892
82	Lutheran Homes of Michigan	MI	1893
22	Franciscan Communities	IL	1894
21	Volunteers of America	VA	1896
26	Augustana Care Corporation	MN	1896
34	Hebrew SeniorLife	MA	1903
57	Phoebe Ministries	PA	1903
60	Lutheran SeniorLife	PA	1904
96	Elder Care Alliance	CA	1906
100	Western Home Communities	IA	1906
71	United Methodist Homes of New Jersey	NJ	1907

2012 Rank	System Name	State	Year Founded
18	Front Porch	CA	1908
85	United Methodist Memorial Home	IN	1910
30	Otterbein Senior Lifestyle Choices	OH	1912
99	Sunnyside Communities	VA	1912
45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1913
43	Presbyterian Homes	IL	1914
31	Springpoint Senior Living	NJ	1916
93	Living Branches	PA	1917
75	United Church Homes	OH	1920
1	Evangelical Lutheran Good Samaritan Society	SD	1922
14	Ohio Presbyterian Retirement Services	OH	1922
73	VMP	WI	1925
15	Asbury Communities	MD	1926
33	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1926
11	Presbyterian Senior Living	PA	1927
29	Elim Care	MN	1927
66	Presbyterian SeniorCare	PA	1928
59	American Baptist Homes of the Midwest	MN	1930
35	Homewood Retirement Centers	MD	1932
86	Mather LifeWays	IL	1941
56	Virginia Baptist Homes	VA	1945
58	Virginia United Methodist Homes, Inc.	VA	1945
68	Presbyterian Villages of Michigan	MI	1945
78	The Presbyterian Homes, Inc. of North Carolina	NC	1946
48	WesleyLife	IA	1947

## 4-13 2012 LeadingAge Ziegler 100

### Analysis of the Data: Foundings

#### 4-13a 2012 RANK, DETAILED BY YEAR FOUNDED

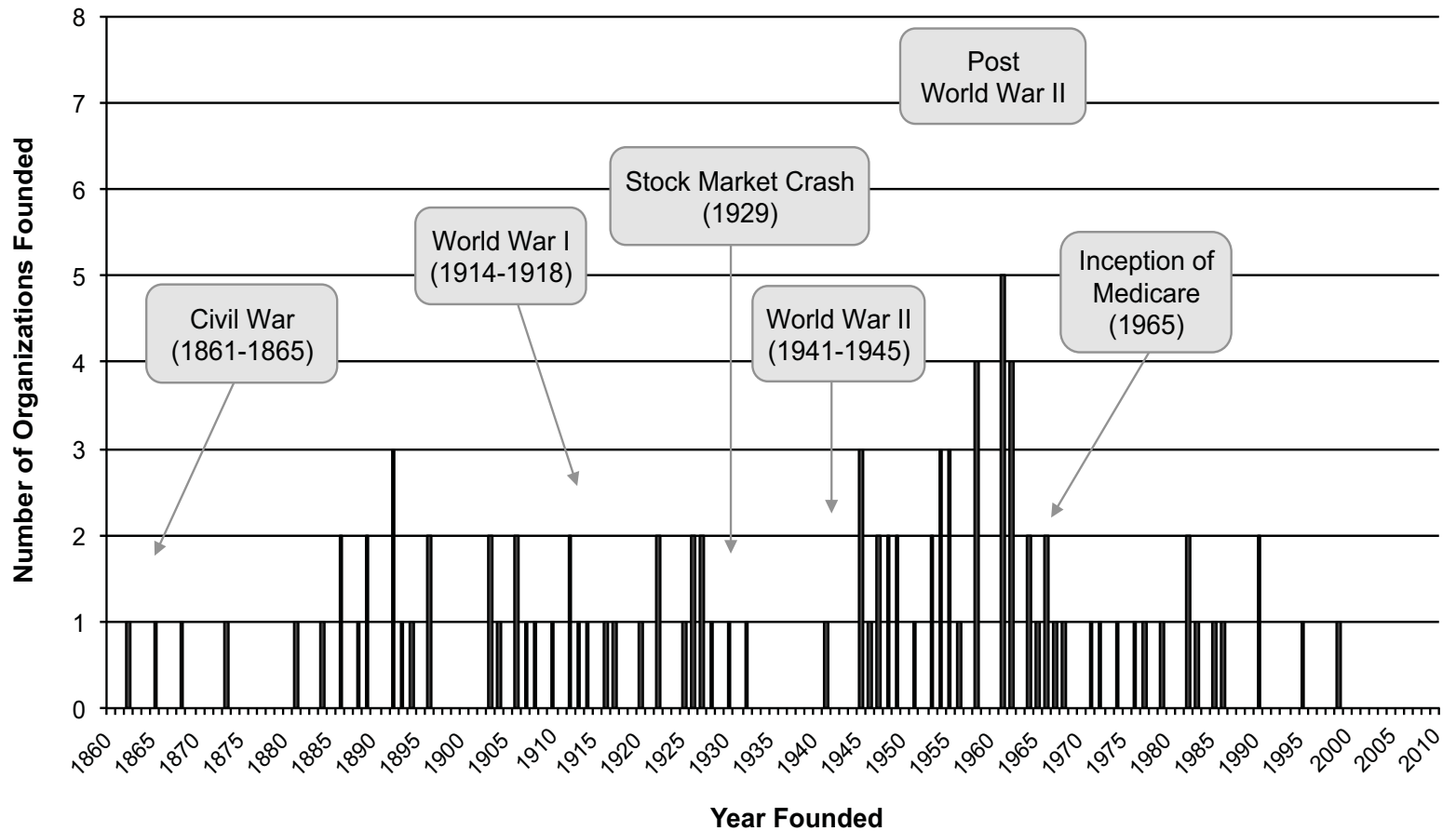
2012 Rank	System Name	State	Year Founded	2012 Rank	System Name	State	Year Founded
84	Christian Care Centers	TX	1947	51	Lutheran Services for the Aging	NC	1962
20	Presbyterian Manors of Mid-America	KS	1948	81	Methodist Retirement Communities and Affiliates	TX	1962
87	Oakwood Lutheran Senior Ministries	WI	1948	89	Presbyterian Communities and Services	TX	1962
12	Cornerstone Affiliates	CA	1949	64	Air Force Villages	TX	1964
95	LutherCare	PA	1949	76	Menno Haven	PA	1964
62	Lutheran Social Services of South Central Pennsylvania	PA	1951	40	Episcopal Senior Communities	CA	1965
4	Presbyterian Homes and Services	MN	1953	47	Mississippi Methodist Senior Services	MS	1966
88	Cedar Community	WI	1953	63	Sears Methodist Retirement System, Inc.	TX	1966
8	Westminster Communities of Florida	FL	1954	44	Greencroft	IN	1967
42	Buckner Retirement Services, Inc.	TX	1954	37	Eskaton	CA	1968
91	Presbyterian Communities of South Carolina	SC	1954	10	The Kendal Corporation	PA	1971
32	be.group	CA	1955	3	ACTS Retirement-Life Communities, Inc.	PA	1972
77	Presby's Inspired Life	PA	1955	61	EMA, Inc.	MD	1974
92	Goodwin House Incorporated	VA	1955	7	Lifespace Communities, Inc.	IA	1976
25	Providence Life Services	IL	1956	80	United Methodist Retirement Homes, Inc.	NC	1977
27	Shell Point	FL	1958	28	Christian Care Companies	AZ	1979
53	Baptist Village Retirement Communities of Oklahoma	OK	1958	24	Willow Valley Retirement Communities	PA	1982
65	Northern California Presbyterian Homes and Services	CA	1958	70	Walker Methodist	MN	1982
67	United Methodist Homes	NY	1958	74	Elant	NY	1983
6	Retirement Housing Foundation	CA	1961	54	The Eddy	NY	1985
13	Pacific Retirement Services, Inc.	OR	1961	49	SantaFe Senior Living	FL	1986
38	National Church Residences	OH	1961	55	Bethesda Senior Living Communities	CO	1990
79	United Church Homes & Services	NC	1961	94	Garden Spot Village	PA	1990
98	Morningside Ministries	TX	1961	2	National Senior Campuses	MD	1995
16	Christian Homes, Inc.	IL	1962	36	Senior Quality Lifestyles Corporation	TX	1999



## 4-13 2012 LeadingAge Ziegler 100

Analysis of the Data: Foundings

### 4-13b COMPARISON OF YEAR FOUNDED BY NUMBER OF ORGANIZATIONS



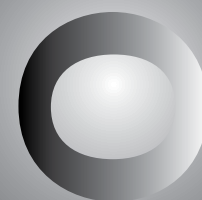
## 4-14 2012 LeadingAge Ziegler 100

### Analysis of the Data: Affiliations

#### 4-14a 2012 RANK, DETAILED BY AFFILIATION

2012 Rank	System Name	State	Affiliation	2012 Rank	System Name	State	Affiliation
1	Evangelical Lutheran Good Samaritan Society	SD	Lutheran	26	Augustana Care Corporation	MN	Lutheran
2	National Senior Campuses	MD	none	27	Shell Point	FL	Christian and Missionary Alliance
3	ACTS Retirement-Life Communities, Inc.	PA	Christian	28	Christian Care Companies	AZ	Christian
4	Presbyterian Homes and Services	MN	Presbyterian	29	Elim Care	MN	Evangelical Free
5	Covenant Retirement Communities	IL	Evangelical Covenant	30	Otterbein Senior Lifestyle Choices	OH	Methodist
6	Retirement Housing Foundation	CA	United Church of Christ	31	Springpoint Senior Living	NJ	Presbyterian
7	Lifespace Communities, Inc.	IA	none	32	be.group	CA	Presbyterian
8	Westminster Communities of Florida	FL	Presbyterian	33	Loretto (Catholic Charities, Diocese of Syracuse)	NY	Catholic
9	Lutheran Senior Services	MO	Lutheran	34	Hebrew SeniorLife	MA	Jewish
10	The Kendal Corporation	PA	Quaker	35	Homewood Retirement Centers	MD	United Church of Christ
11	Presbyterian Senior Living	PA	Presbyterian	36	Senior Quality Lifestyles Corporation	TX	none
12	Cornerstone Affiliates	CA	Baptist	37	Eskaton	CA	Disciples of Christ Church
13	Pacific Retirement Services, Inc.	OR	Presbyterian Influenced	38	National Church Residences	OH	Presbyterian
14	Ohio Presbyterian Retirement Services	OH	Presbyterian	39	Bethesda Health Group, Inc.	MO	none
15	Asbury Communities	MD	Methodist	40	Episcopal Senior Communities	CA	Episcopal
16	Christian Homes, Inc.	IL	Christian	41	Holland Home	MI	Dutch Reformed
17	Ecumen	MN	Lutheran	42	Buckner Retirement Services, Inc.	TX	Baptist
18	Front Porch	CA	Lutheran	43	Presbyterian Homes	IL	Presbyterian
19	Diakon Lutheran Social Ministries	PA	Lutheran	44	Greencroft	IN	Mennonite
20	Presbyterian Manors of Mid-America	KS	Presbyterian	45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	Catholic
21	Volunteers of America	VA	none	46	Concordia Lutheran Ministries	PA	Lutheran
22	Franciscan Communities	IL	Catholic	47	Mississippi Methodist Senior Services	MS	Methodist
23	Masonic Villages	PA	Fraternal	48	WesleyLife	IA	Methodist
24	Willow Valley Retirement Communities	PA	none	49	SantaFe Senior Living	FL	none
25	Providence Life Services	IL	Dutch Reformed	50	Lutheran Life Communities	IL	Lutheran

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## 4-14 2012 LeadingAge Ziegler 100

### Analysis of the Data: Affiliations

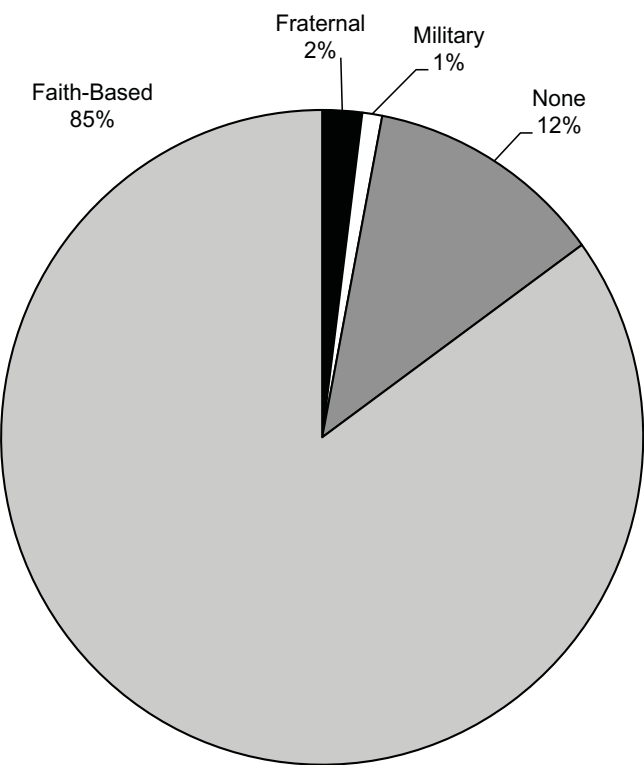
#### 4-14a 2012 RANK, DETAILED BY AFFILIATION

2012 Rank	System Name	State	Affiliation	2012 Rank	System Name	State	Affiliation
51	Lutheran Services for the Aging	NC	Lutheran	76	Menno Haven	PA	Mennonite
52	Masonicare	CT	Fraternal	77	Presby's Inspired Life	PA	Presbyterian
53	Baptist Village Retirement Communities of Oklahoma	OK	Baptist	78	The Presbyterian Homes, Inc. of North Carolina	NC	Presbyterian
54	The Eddy	NY	none	79	United Church Homes & Services	NC	United Church of Christ
55	Bethesda Senior Living Communities	CO	Ecumenical	80	United Methodist Retirement Homes, Inc.	NC	Methodist
56	Virginia Baptist Homes	VA	Baptist	81	Methodist Retirement Communities and Affiliates	TX	Methodist
57	Phoebe Ministries	PA	United Church of Christ	82	Lutheran Homes of Michigan	MI	Lutheran
58	Virginia United Methodist Homes, Inc.	VA	Methodist	83	St. Ann's Community	NY	Catholic
59	American Baptist Homes of the Midwest	MN	Baptist	84	Christian Care Centers	TX	Christian
60	Lutheran SeniorLife	PA	Lutheran	85	United Methodist Memorial Home	IN	Methodist
61	EMA, Inc.	MD	Episcopal	86	Mather LifeWays	IL	none
62	Lutheran Social Services of South Central Pennsylvania	PA	Lutheran	87	Oakwood Lutheran Senior Ministries	WI	Lutheran
63	Sears Methodist Retirement System, Inc.	TX	Methodist	88	Cedar Community	WI	United Church of Christ
64	Air Force Villages	TX	Military	89	Presbyterian Communities and Services	TX	Presbyterian
65	Northern California Presbyterian Homes and Services	CA	Presbyterian	90	Simpson Senior Services	PA	Methodist
66	Presbyterian SeniorCare	PA	Presbyterian	91	Presbyterian Communities of South Carolina	SC	Presbyterian
67	United Methodist Homes	NY	Methodist	92	Goodwin House Incorporated	VA	Episcopal
68	Presbyterian Villages of Michigan	MI	Presbyterian	93	Living Branches	PA	Mennonite
69	Lutheran Homes of South Carolina	SC	Lutheran	94	Garden Spot Village	PA	Mennonite
70	Walker Methodist	MN	Methodist	95	Luthercare	PA	Lutheran
71	United Methodist Homes of New Jersey	NJ	Methodist	96	Elder Care Alliance	CA	Ecumenical
72	Wesley Enhanced Living	PA	Methodist	97	Christian Care Communities	KY	Christian
73	VMP	WI	none	98	Morningside Ministries	TX	Ecumenical
74	Elant	NY	none	99	Sunnyside Communities	VA	Presbyterian
75	United Church Homes	OH	United Church of Christ	100	Western Home Communities	IA	none

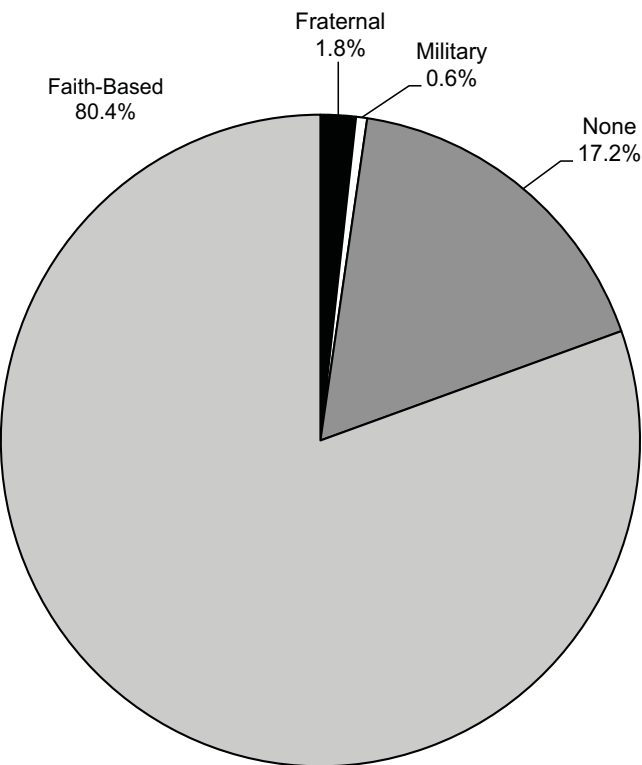
# 4-14 2012 LeadingAge Ziegler 100

Analysis of the Data: Affiliations

4-14b AFFILIATION BY TOTAL NUMBER OF SYSTEMS



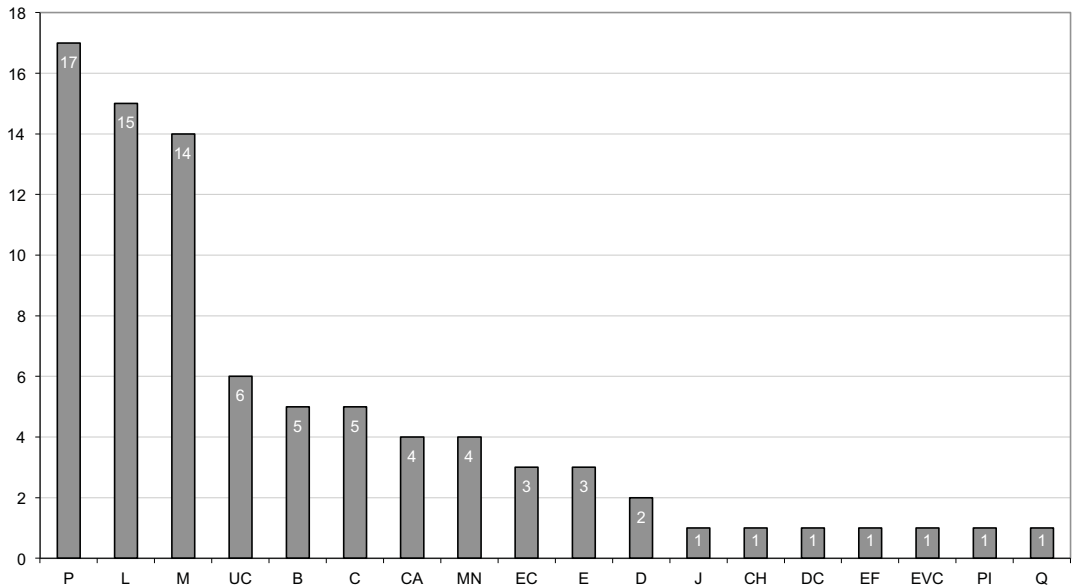
4-14c AFFILIATION BY TOTAL NUMBER OF UNITS



# 4-14 2012 LeadingAge Ziegler 100

## Analysis of the Data: Affiliations

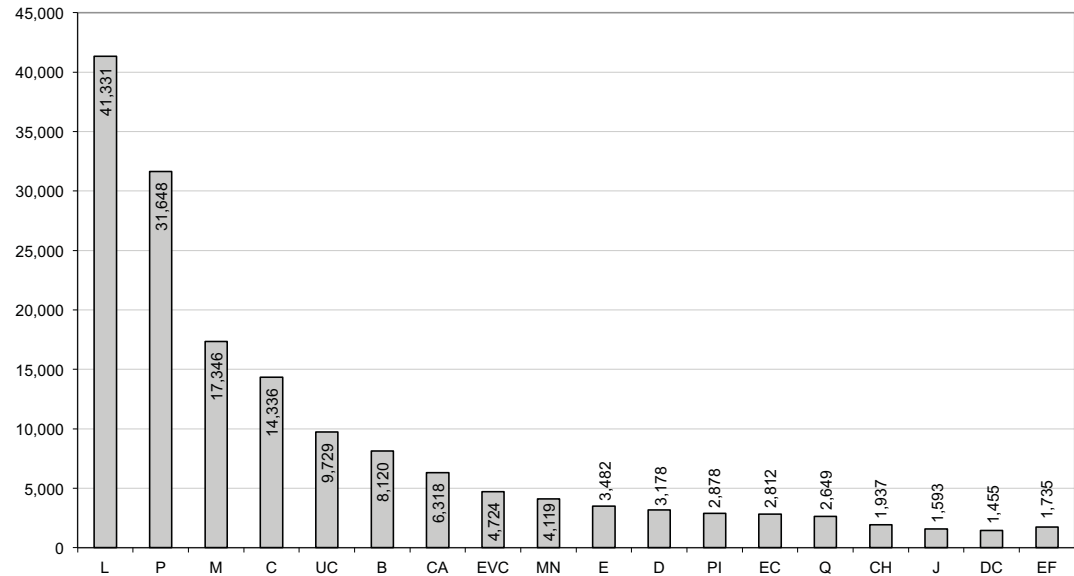
4-14d FAITH-BASED AFFILIATIONS, BY TOTAL NUMBER OF SYSTEMS



### Religions

- B** Baptist
- C** Christian
- CA** Catholic
- CH** Christian Missionary and Alliance
- DC** Disciples of Christ
- D** Dutch Reformed
- E** Episcopal
- EC** Ecumenical
- EF** Evangelical Free
- EVC** Evangelical Covenant
- J** Jewish
- L** Lutheran
- M** Methodist
- MN** Mennonite
- P** Presbyterian
- PI** Presbyterian Influenced
- Q** Quaker
- UC** United Church of Christ

4-14e FAITH-BASED AFFILIATIONS, BY TOTAL UNITS



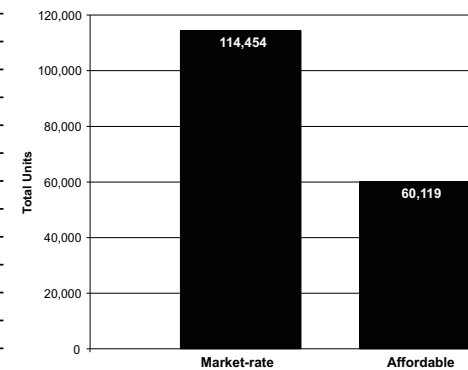
## 4-15 2012 LeadingAge Ziegler 100

### Analysis of the Data: Affordable Housing

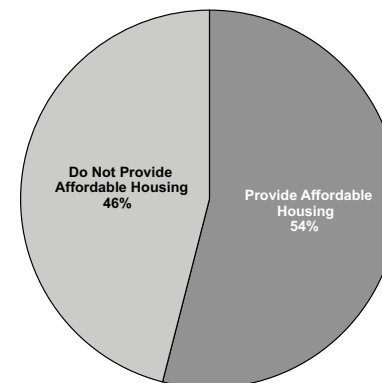
#### 4-15a LZ 100 PROVIDERS OF HOUSING, RANKED BY TOTAL AFFORDABLE HOUSING UNITS

Rank	2012 LZ 100 Rank	System Name	State	Units	Communities*
1	38	National Church Residences	OH	16,143	226
2	6	Retirement Housing Foundation	CA	10,092	115
3	21	Volunteers of America	VA	9,834	160
4	75	United Church Homes	OH	2,070	49
5	8	Westminster Communities of Florida	FL	2,032	10
6	31	Springpoint Senior Living	NJ	1,712	17
7	12	Cornerstone Affiliates	CA	1,701	22
8	32	be.group	CA	1,657	25
9	68	Presbyterian Villages of Michigan	MI	1,326	17
10	1	Evangelical Lutheran Good Samaritan Society	SD	1,203	28
11	77	Presby's Inspired Life	PA	1,133	13
12	13	Pacific Retirement Services, Inc.	OR	1,105	24
13	66	Presbyterian SeniorCare	PA	970	22
14	34	Hebrew SeniorLife	MA	766	2
15	97	Christian Care Communities	KY	743	10
16	40	Episcopal Senior Communities	CA	676	4
17	65	Northern California Presbyterian Homes and Services	CA	600	3
18	17	Ecumen	MN	501	4
19	11	Presbyterian Senior Living	PA	414	6
20	9	Lutheran Senior Services	MO	392	6
21	57	Phoebe Ministries	PA	356	8
22	44	Greencroft	IN	352	2
23	19	Diakon Lutheran Social Ministries	PA	335	3
24	81	Methodist Retirement Communities and Affiliates	TX	319	1
25	47	Mississippi Methodist Senior Services	MS	313	0
26	71	United Methodist Homes of New Jersey	NJ	300	5
27	4	Presbyterian Homes and Services	MN	293	3
28	28	Christian Care Companies	AZ	247	1
29	26	Augustana Care Corporation	MN	188	0
30	72	Wesley Enhanced Living	PA	162	3

#### 4-15b COMPARISON OF MARKET-RATE VS. AFFORDABLE UNITS OF HOUSING PROVIDERS



#### 4-15c PERCENTAGE OF LZ 100 PROVIDING HOUSING



## 4-15 2012 LeadingAge Ziegler 100

### Analysis of the Data: Affordable Housing

#### 4-15a LZ 100 PROVIDERS OF HOUSING, RANKED BY TOTAL AFFORDABLE HOUSING UNITS

Rank	2012 LZ 100 Rank	System Name	State	Units	Communities*
31	82	Lutheran Homes of Michigan	MI	161	0
32	14	Ohio Presbyterian Retirement Services	OH	150	0
33	79	United Church Homes & Services	NC	150	5
34	15	Asbury Communities	MD	149	1
35	63	Sears Methodist Retirement System, Inc.	TX	149	2
36	22	Franciscan Communities	IL	139	3
37	70	Walker Methodist	MN	139	3
38	33	Loretto (Catholic Charities, Diocese of Syracuse)	NY	134	4
39	43	Presbyterian Homes	IL	109	3
40	62	Lutheran Social Services of South Central Pennsylvania	PA	107	0
41	18	Front Porch	CA	100	0
42	93	Living Branches	PA	100	0
43	59	American Baptist Homes of the Midwest	MN	90	0
44	25	Providence Life Services	IL	81	1
45	90	Simpson Senior Services	PA	81	2
46	45	Catholic Health Care Services of the Archdiocese of Philadelphia*	PA	75	1
47	60	Lutheran SeniorLife	PA	55	0
48	51	Lutheran Services for the Aging	NC	50	1
49	29	Elim Care	MN	48	1
50	37	Eskaton	CA	40	0
51	87	Oakwood Lutheran Senior Ministries	WI	30	0
52	80	United Methodist Retirement Homes, Inc.	NC	24	1
53	16	Christian Homes, Inc.	IL	21	0
54	78	The Presbyterian Homes, Inc. of North Carolina	NC	2	0

\* The count of communities only includes free-standing affordable housing communities. Communities that contain other types of housing were not included in the count.

## 4-16 2012 LeadingAge Ziegler 100

### Analysis of the Data: Managed Units & Communities

#### 4-16a LZ 100 PROVIDERS THAT MANAGE, RANKED BY MANAGED-ONLY UNITS

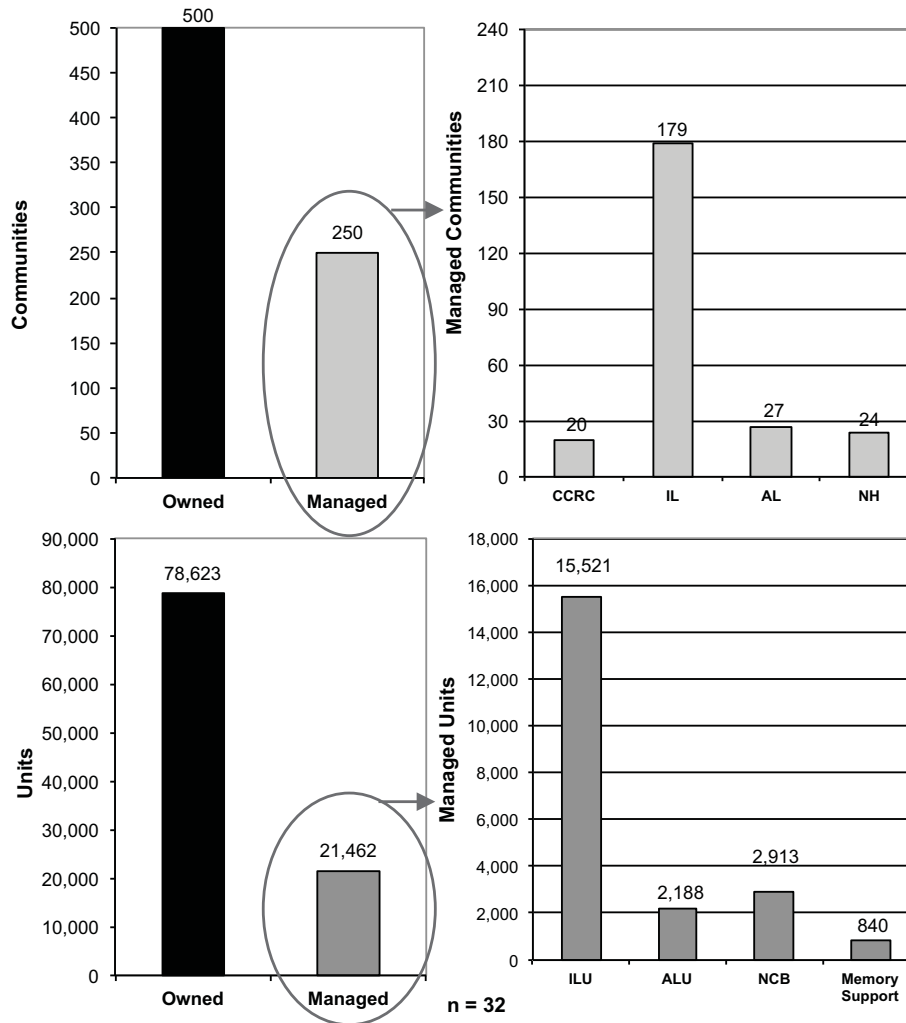
Rank	2012 LZ 100 Rank	System Name	State	Managed-only	
				Units	Communities
1	38	National Church Residences	OH	5,395	61
2	66	Presbyterian SeniorCare	PA	1,737	28
3	12	Cornerstone Affiliates	CA	1,665	19
4	18	Front Porch	CA	1,664	25
5	59	American Baptist Homes of the Midwest	MN	1,113	9
6	17	Ecumen	MN	1,034	22
7	13	Pacific Retirement Services, Inc.	OR	967	3
8	31	Springpoint Senior Living	NJ	930	8
9	77	Presby's Inspired Life	PA	787	11
10	15	Asbury Communities	MD	587	3
11	16	Christian Homes, Inc.	IL	549	2
12	1	Evangelical Lutheran Good Samaritan Society	SD	523	9
13	37	Eskaton	CA	511	5
14	63	Sears Methodist Retirement System, Inc.	TX	480	3
15	75	United Church Homes	OH	459	3
16	25	Providence Life Services	IL	346	1
17	22	Franciscan Communities	IL	333	2
18	4	Presbyterian Homes and Services	MN	309	4
19	26	Augustana Care Corporation	MN	278	6
20	71	United Methodist Homes of New Jersey	NJ	240	4
21	9	Lutheran Senior Services	MO	208	3
22	6	Retirement Housing Foundation	CA	198	2
23	70	Walker Methodist	MN	178	2
24	21	Volunteers of America	VA	162	1
25	80	United Methodist Retirement Homes, Inc.	NC	155	1
26	44	Greencroft	IN	143	3
27	92	Goodwin House Incorporated	VA	143	1
28	50	Lutheran Life Communities	IL	105	1
29	65	Northern California Presbyterian Homes and Services	CA	94	3
30	100	Western Home Communities	IA	75	2
31	79	United Church Homes & Services	NC	72	2
32	68	Presbyterian Villages of Michigan	MI	22	1



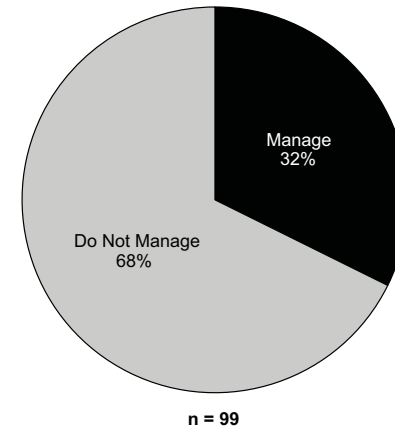
## 4-16 2012 LeadingAge Ziegler 100

Analysis of the Data: Managed Units & Communities

### 4-16b COMPARISON OF OWNED VS. MANAGED COMMUNITIES AND UNITS OF PROVIDERS THAT MANAGE



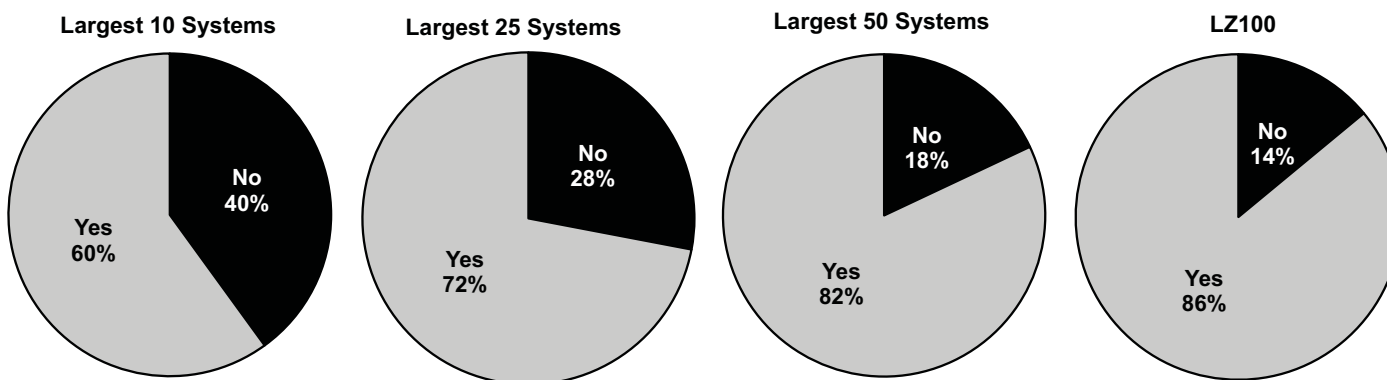
### 4-16c PERCENTAGE OF LZ 100 THAT MANAGE



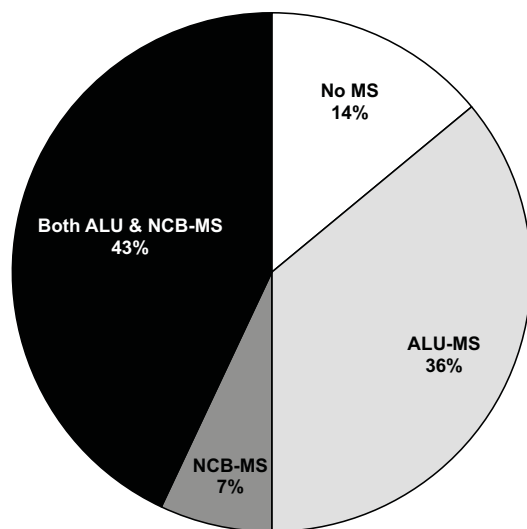
## 4-17 2012 LeadingAge Ziegler 100

Analysis of the Data: Memory Support (MS) Units

### 4-17a PERCENTAGE OF LZ 100 THAT OFFER MS



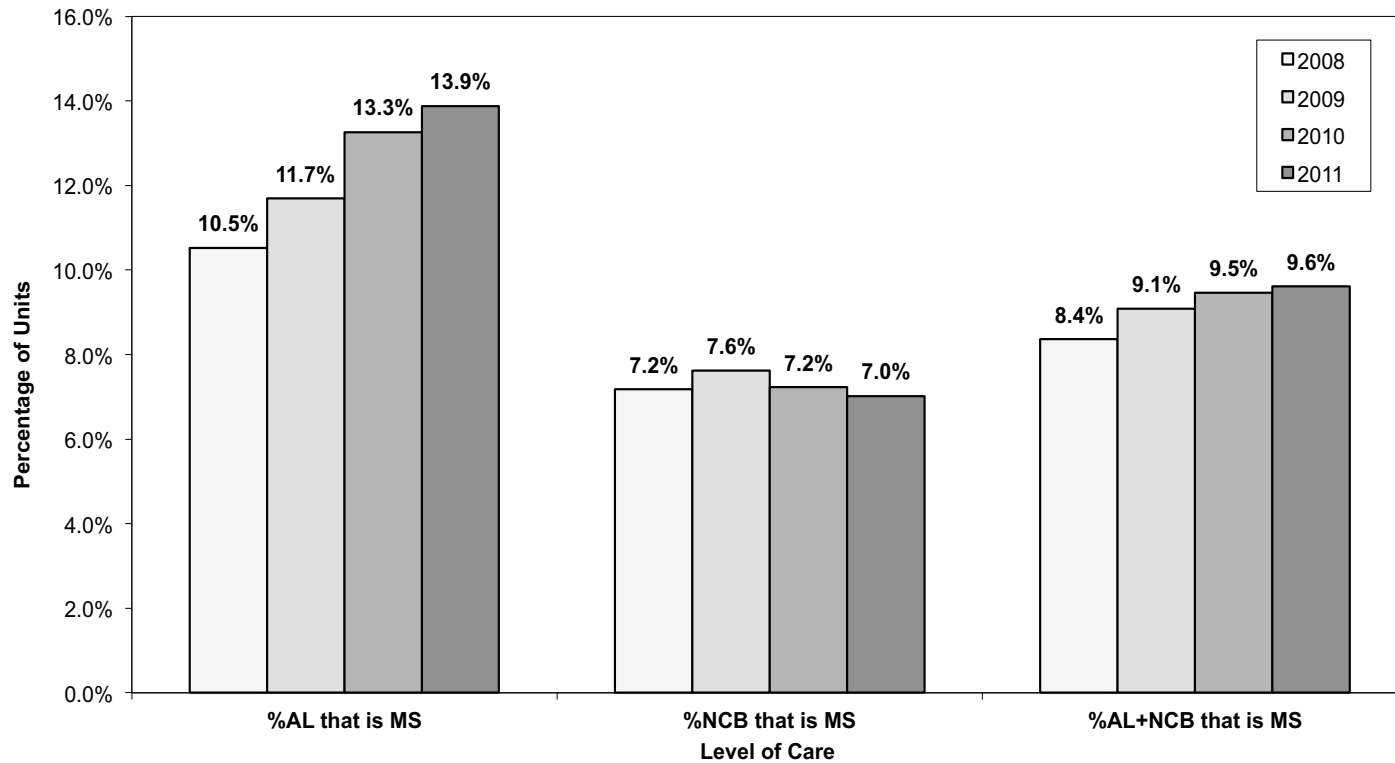
### 4-17b PERCENTAGE OF MS UNITS, BY LEVEL OF CARE



## 4-17 2012 LeadingAge Ziegler 100

Analysis of the Data: Memory Support (MS) Units

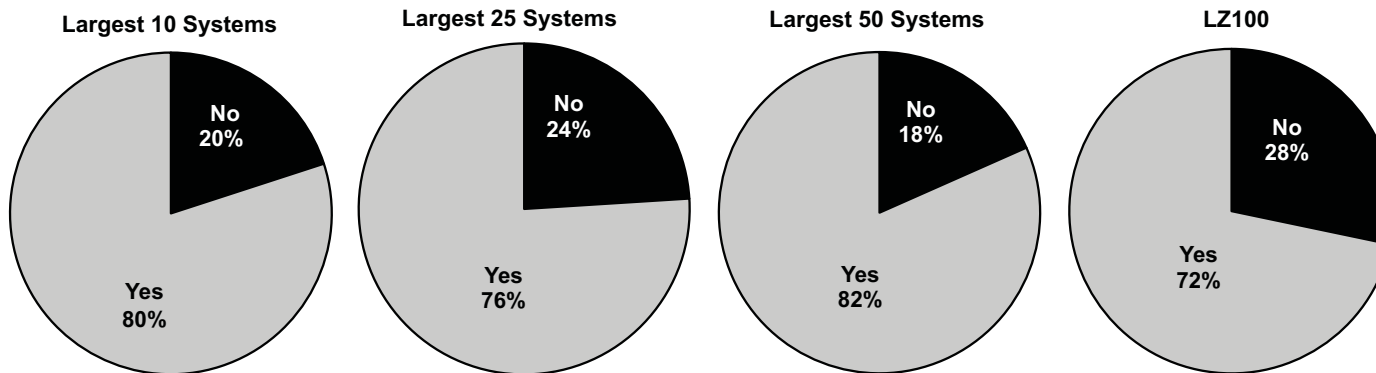
4-17c 2012 LZ 100 MS UNITS AS A PERCENTAGE OF ALL UNITS, BY LEVEL OF CARE, 2008-2011



## 4-18 2012 LeadingAge Ziegler 100

Analysis of the Data: Home and Community-Based Services (HCBS)

### 4-18a PERCENTAGE OF LZ 100 THAT OFFER HCBS



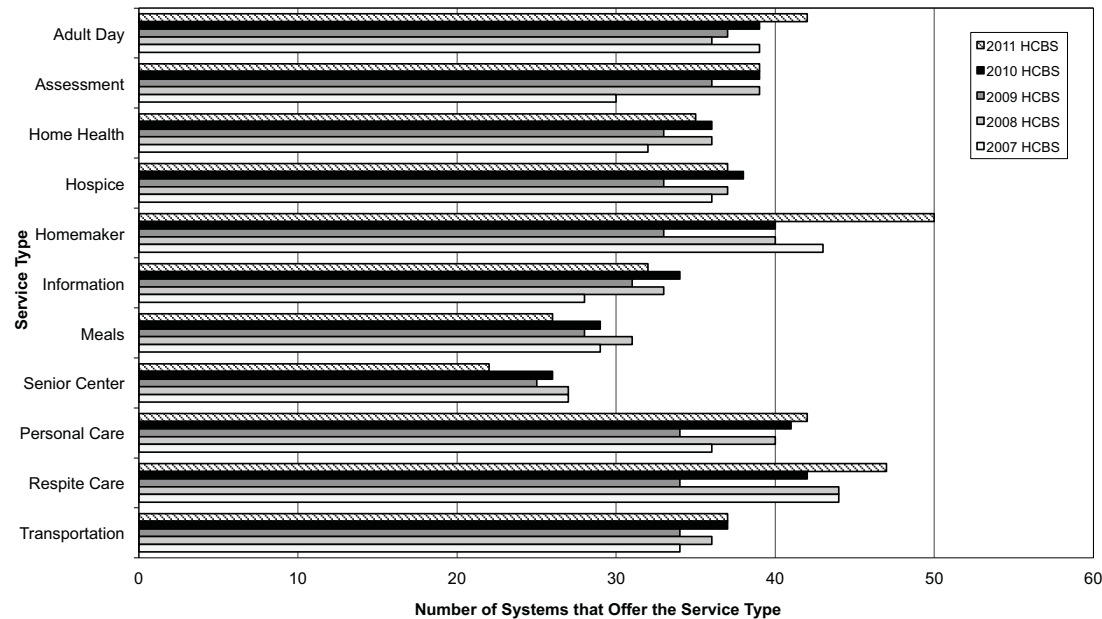
### 4-18b COMPARISON OF ORGANIZATIONS' AGE AND PROVISIONS OF HCBS

Largest	Average Age of HCBS Providers (years)	Average Age of Non-HCBS Providers (years)
10	72.1	42.5
25	87.1	54.7
50	82.4	51.9
100	76.1	70.2

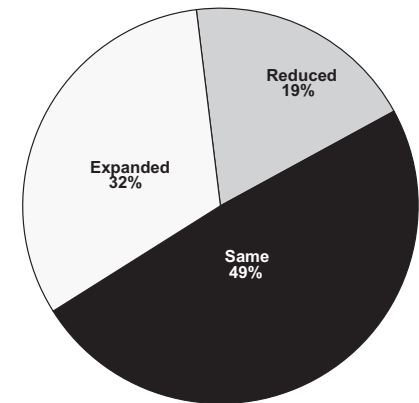
## 4-18 2012 LeadingAge Ziegler 100

Analysis of the Data: Home and Community-Based Services (HCBS)

### 4-18c COMPARISON OF HCBS OFFERED, BY TYPE, BY YEAR



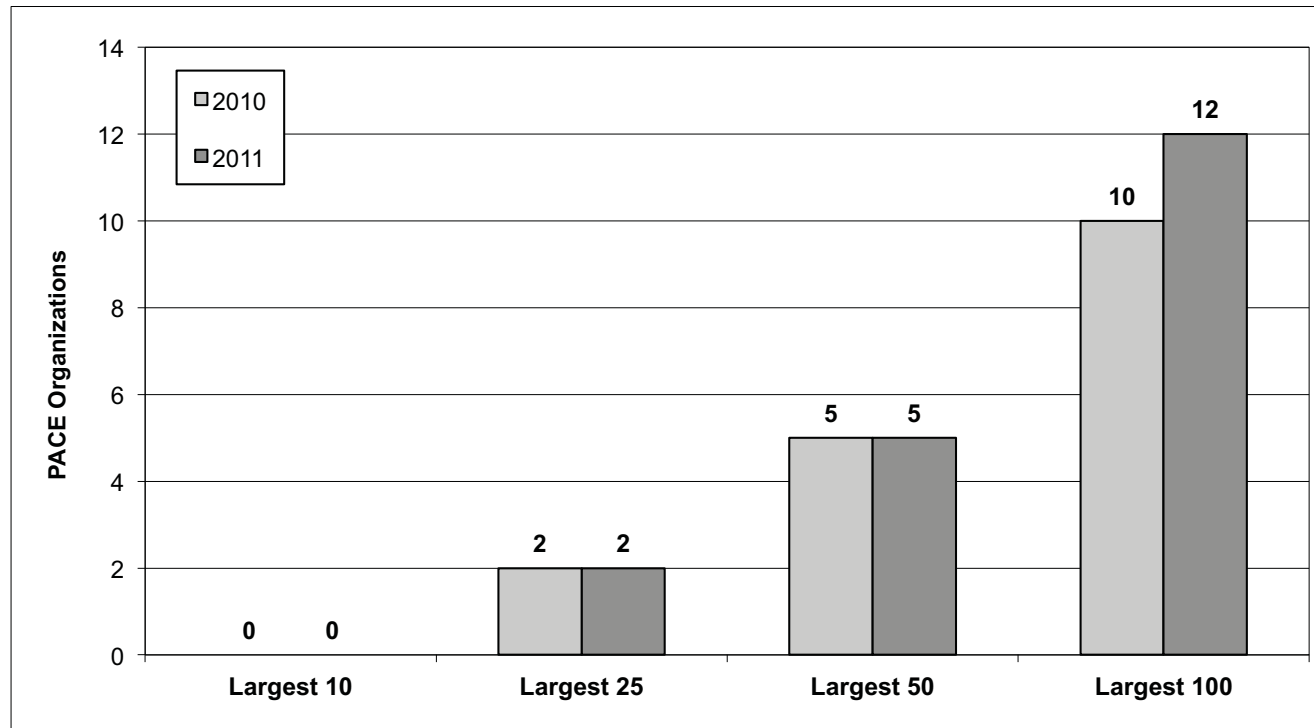
### 4-18d LZ 100 THAT EXPANDED OR REDUCED TYPES OF HCBS SERVICES OFFERED IN 2011



## 4-19 2012 LeadingAge Ziegler 100

Analysis of the Data: Program of All-Inclusive Care for the Elderly (PACE)

### 4-19a NUMBER OF LZ 100 ORGANIZATIONS THAT OFFER PACE



### 4-19b COMPARISON OF PACE LOCATIONS AND ENROLLEES

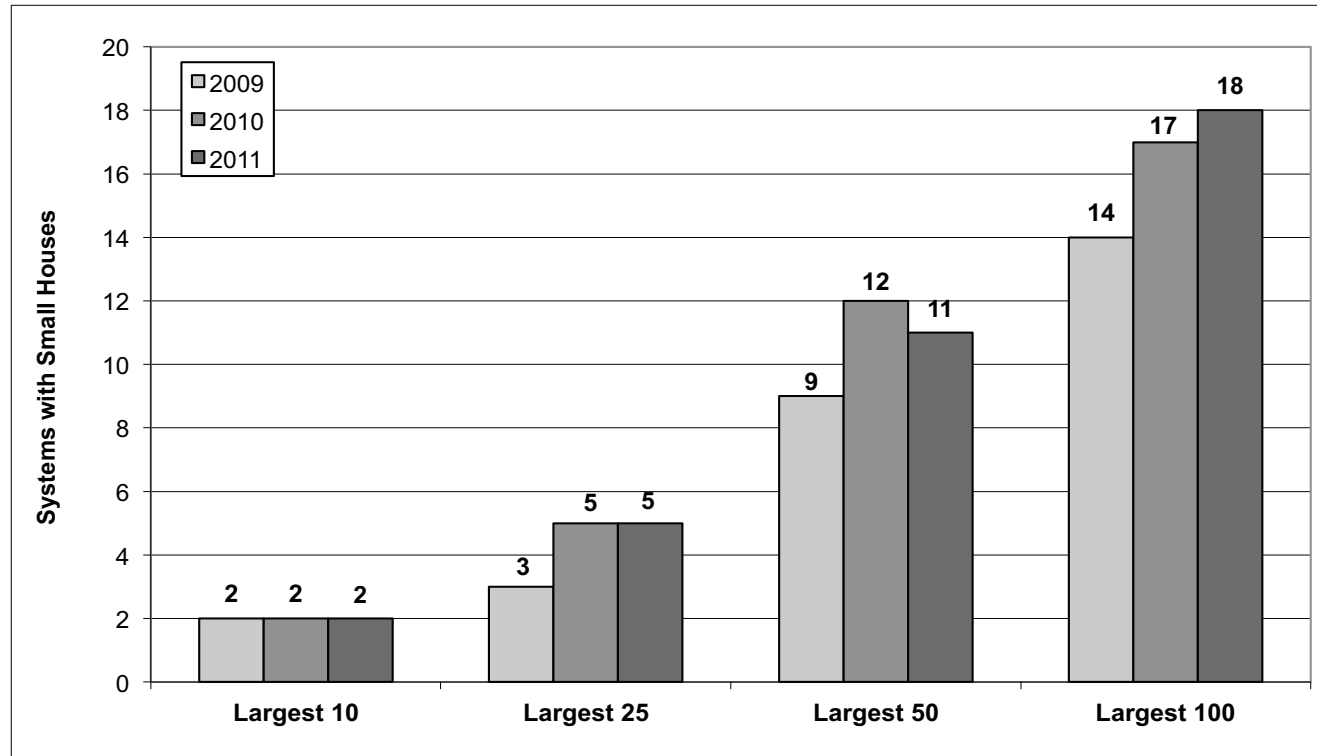
	Total PACE Locations	Total Number of Enrollees
Largest 10 (n=0)	0	0
Largest 25 (n=2)	6	392
Largest 50 (n=5)	10	718
Largest 100 (n=12)	20	1,486*

\*One organization did not provide its total number of PACE enrollees

## 4-20 2012 LeadingAge Ziegler 100

Analysis of the Data: Small House & Green House® Models

### 4-20a NUMBER OF LZ 100 ORGANIZATIONS THAT OFFER SMALL HOUSES, 2009-2011



### 4-20b COMPARISON OF SMALL HOUSE AND GREEN HOUSE® LOCATIONS

	Total Number of Small Houses	Total Number of Small Houses that are Green Houses®
Largest 10 (n=2)	29	0
Largest 25 (n=5)	34	0
Largest 50 (n=11)	116	22
Largest 100 (n=18)	169	44

## Chapter 5

### Growth and Change

This section of the LZ 100 publication is focused on the ways in which the LZ 100 have grown and changed over their histories. The analysis includes the largest 10 organizations and how they have changed since inception. History is divided into multiple segments, first from 1900, then from 1950, 1980, 1990, and 2000. The bird's eye view of the growth of these organizations illustrates the pace of growth by type of unit. Their combined growth in numbers of ILUs, ALUs, NCBs and total units is traced. Note: Due to the number of communities owned by ELGSS, capturing the details of the organization's change over the years has proven to be more difficult than anticipated. This organization's history continues to be excluded from the Pace of Growth charts.

The charts provide a dramatic picture of the pace of growth over the last century, particularly since 1950. The most rapid growth has occurred since 1990, with independent living leading this growth. The growth in number of assisted living and nursing care beds shown on each of the charts (relatively flat) has been achieved primarily through CCRC construction as opposed to the addition of free-standing communities. The cross-over in growth rates, i.e. when the growth in NCBs and ALUs was eclipsed by the growth in ILUs, occurred in the early 1960s. Chart 5-1b shows that ILU growth for the LZ 100 (Largest 10 Systems) began its current trend of more rapid ascent in the mid-1970s.

In Charts 5-2a-b the largest 10 organizations' histories are plotted alongside one another (excluding ELGSS). These charts provide a graphic look at the different pace of growth organizations can employ. The pace an organization chooses, as noted earlier, may change over the years, reflecting a change in mission, leadership, or what Ziegler has termed an "alignment of the constituencies" of the organization in a way that enhances the organization's ability to implement change.



The Kendal Corporation (LZ 100 #10) has nearly tripled in size in the last 20 years (Chart 5-4i). From its inception in 1971, it has grown to approximately 3,100 units. Since 2000, it has added more than 1,000 units. Kendal envisions the full impact of its work as “the transformation of our culture’s view of aging, of older persons, and of the potential for fulfillment and continuing contribution during the later stages of life.” This organization has grown through new community development and construction and affiliation with similar organizations, both which have enabled Kendal to continue to respond to the call to broaden its services. Ziegler has termed “constituency alignment” as one of the necessary ingredients for successful growth, no matter what the pace of growth or change. To achieve the pace of growth shown for this organization, it must continually work to find strategic alignment among staff, board, residents and investors. From Ziegler’s experience, organizations that are successfully implementing this type of strategic change have worked to develop a culture willing to embrace the inevitable challenges.

As emphasized above, however, constituency alignment is an ingredient for successful growth and change, no matter what the pace of growth. Chart 5-2a examines the growth rate of the largest 10 in another manner. Here it is clear that the pace of growth of the other eight of the nine tracked in the largest 10 is occurring at widely varied rates for each system and over different periods of time. These organizations are also focused on ensuring that their constituencies, from residents to capital markets participants, are mutually aligned to understand the strategic goals for growth and change in their organizations.

Chart 5-2b compares organizations ranked three (3) through ten (10) of the LZ 100; the growth rates of these organizations can more easily be compared on a scale that doesn’t include National Senior Campuses or Evangelical Lutheran Good Samaritan Society.

## Pace of Growth: The Largest 25

Pace of Growth charts (Charts 5-4a-w) trace the growth patterns of 23 of the 25 largest multi-sites in the LZ 100. Each significant point of growth in a multi-site’s history is marked and explained on the chart. We continue to exclude two of the largest 25 organizations of the LZ 100 where we have insufficient detail to track historical growth for Pace of Growth charts: ELGSS (LZ 100 #1) and Ecumen (LZ 100 #17). The Pace of Growth charts show, at a glance, the different methods of change the systems are employing. As before, significant new community construction and expansions are noted, with the emergence of the system (that is, the addition of the second community) highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

The collection of Pace of Growth charts provides a picture of the different paces and methods by which organizations grow and change. Some organizations have grown rapidly, such as National Senior Campuses (LZ 100 #2, Chart 5-4a). This organization’s growth has been entirely through new community construction. Some organizations may have grown at a steady, though slower, pace but also primarily through new community construction, such as tri-state system Presbyterian Homes and Services (LZ 100 #4, Chart 5-4c). The mission of this organization is to serve as many seniors in its market area as possible, either through the provision of senior living services or home and community-based services.

Single-state system Westminster Communities of Florida (LZ 100 #8, Chart 5-4g) is an organization that has grown predominantly through acquisition. Starting with the acquisition of Westminster Towers approximately 30 years ago, the organization doubled in size in the 1990s and early 2000s, primarily through the expansion of existing communities or through acquisition. Only this system’s market-rate housing is shown on the Pace of Growth chart; it owns and manages a significant number of government-subsidized units as well.

Across states system Presbyterian Senior Living (LZ 100 #11, Chart 5-4j) has grown dramatically since 2002. Its most recent growth was through the opening of The Long Community at Highland (in 2011) and Carroll Village (in 2009). However, its traditional manner of growth has primarily been through acquisition, particularly through denominational ties. Metropolitan system Willow Valley Retirement Communities (LZ 100 #24, Chart 5-4v) is a relatively slow grower. This organization is comprised of three large campuses located in close proximity to one another, separated by a retail area.

We encourage readers to study each of the Pace of Growth charts, comparing not only the differing pace by which these organizations have grown and changed, but the methods by which these changes have occurred.

## Emerging Systems

What may be obvious, but should nonetheless be stated, is that nearly all of the systems “emerged” from a single-site organization. However, the length of time for emergence varies widely among the LZ 100. Chart 5-5a shows the addition of second communities by the LZ 100 organizations, sorted by the date of founding of the organization. Note that among the eleven pre-1900 founded organizations, four have opened their second communities since 2000 (Simpson Senior Services (LZ 100 #90), St. Ann’s Community (LZ 100 #83), Lutheran Life Communities (LZ 100 #50), and Concordia Lutheran Ministries (LZ 100 #46); three of those have opened a third campus, as well. Changing leadership, both at key executive levels and in board positions, as well as unique opportunities in the marketplace often move organizations with rich histories as single-site to consider growth.

Chart 5-5b organizes the emergence of systems by the decade in which the second community was added. It was in the 1960s and 1970s that many of the LZ 100 organizations began to add second communities. New not-for-profit systems are emerging every year. Many of these systems are emerging out of metropolitan areas that are facing more competitive pressure, or out of more sophisticated, larger, single-site organizations whose management teams and boards are ready to expand the mission and the desire to serve more residents. Among the nearly 500 organizations tracked for preparation of this publication are a number of organizations that have just emerged as systems, recently having added their second campus with a goal to grow further. For instance, Friendship Village of Schaumburg (affiliate of Friendship Senior Options) is #16 on the listing of single-campus senior living communities (Chart 6-1a) and will join the ranks of the LZ 100 in 2013 with the addition of its newest campus, Greenfields of Geneva which opened in early 2012 in Geneva, Illinois. Chart 5-5c is a scatter graph illustration of the emergence data in a more visual form. The scatter graph illustrates that the oldest LZ 100 organizations took from 80 to 100 years to add their second communities. The organization that took the longest to “emerge” into a system was LZ 100 # 90 Philadelphia-based Simpson Senior Services. The scatter graph also illustrates that “younger” LZ 100 organizations tend to add their second communities more quickly. Senior Quality Lifestyles, founded in 1999, built its first campus in 2001, opened its second in 2005 and its third in 2007. The diagonal line across the scatter graph is a reference point for understanding how close to the current year a new campus has been added, that is, the closer an organization is to this line, the more recent its emergence. Charts 5-5d and 5-5e offer additional perspectives on system emergence. While more than half of the LZ 100 took more than 15 years to add their second site, the addition of a third site typically occurs much more rapidly.

## Rapid Growers

The “rapid growers” are the organizations within the LZ 100 that have increased in size the fastest between 2010 and 2011, between 2000 and 2011 and between 1990 and 2011 (Charts 5-6a-b). They are the leading multi-site organizations in the LZ 100 in terms of aggregate growth rates and total units added in each period.

**Fastest Aggregate Growth: 1990 to date**

***National Senior Campuses (LZ 100 # 2)***

National Senior Campuses (NSC) opened its first community, Oak Crest Village, in Parkville, MD in 1995. Currently NSC operates fifteen CCRCs (after selling two in 2010) located throughout the country.

**Fastest Aggregate Growth: 2000 to date**

***Senior Quality Lifestyles Corporation (LZ 100 # 36)***

Senior Quality Lifestyles Corporation (SQLC) opened its first community, Edgemere, in Dallas, TX in 2001. Currently SQLC operates five CCRCs, all located in Texas (Houston, Dallas, Austin, Corpus Christi and Fort Worth).

**Fastest Aggregate Growth in 2011**

***Senior Quality Lifestyles Corporation (LZ 100 # 36)***

SQLC opened its two newest communities in 2011, The Stayton at Museum Way in Fort Worth, and Mirador in Corpus Christie. The opening of these communities added over 500 units to the organization, a nearly 50% increase in total units.

Chart 5-6b puts the growth rates into context, both through the absolute number of units added and the rate at which units have been added. Perhaps what is most intriguing are the organizations that have managed to maintain aggressive growth rates over an extended period of years.

In initial publications of the LZ 100, average annual growth rate was presented as a straightforward arithmetic calculation that tended to mask the actual growth trends of systems. Average annual growth is calculated through a geometric mean calculation that captures the time-factor in growth. For example, it may have taken an organization 50 years to double from the size of its original single-site campus; it may have then doubled again in a five-year period. These changes in growth rates are not uncommon and may be the result of a combination of a new management team with a new focus or an existing team’s shift in focus and a decision to accelerate.

The fastest growing organizations from 1990 to 2011 that began the study period (1990) as single-sites were Pacific Retirement Services (LZ 100 #13, with its first community, Rogue Valley Manor (OR) and Elant (LZ 100 #77), with its first community, Elant at Goshen (NY).

When ranked by units added, seven of the 10 rapid growers during 2011 are in the largest 25 of the LZ 100. The larger an organization's size, the greater the sheer size its growth must be to reach a double-digit aggregate growth rate. To study this phenomenon more closely, we again examined the growth rates for only those organizations with more than 2,000 units. Chart 5-6c offers a focused picture of the range in the pace of growth among the largest of the LZ 100. In 2011, the fastest growers among these large organizations range from an annual growth rate of 0.84 percent by Asbury Communities (LZ 100 #15) to an average annual growth rate of 18.23 percent by The Kendal Corporation (LZ 100 #10). These rates are significantly higher than those reported in the 2011 and 2010 LZ 100 publications, probable reflections of a return to growth after challenges in 2009.

When growth over the period of 2000 through 2011 is analyzed, Senior Quality Lifestyles Corporation (LZ 100 #36) ranks at the top across this time period; however, this system was founded after the beginning of the time period and therefore, growth rates cannot be calculated in this case (Chart 5-6a). The ability of a not-for-profit to manage consistent growth over an extended period of time is generally evidence of an organization that has sound strategic principles in place as well as a good understanding of the management infrastructure necessary to manage that pace of growth. These organizations have found the appropriate alignment among their constituencies as discussed earlier. It may also be evidence of the tenure of particular key executives and teams in combination with governance that has chosen to implement a master plan.

Some organizations have chosen to manage their property portfolios through disposition (Chart 5-6d). The most significant decrease in 2011 occurred for Springpoint Senior Living (LZ 100 #31). This organization disposed of four stand-alone assisted living facilities in 2011, leaving them with a market-rate portfolio of solely CCRCs, besides their affordable housing offerings. As Chart 5-6d shows, it is not uncommon for the LZ 100 to implement strategies that incorporate dispositions.

We continue to track both single-campus organizations that have recently moved to two-campus, or multi-site, status as well as single-campus organizations poised for growth. Both types of organizations continue on the LZ 100 "watch list" so that we can examine emerging trends from these newly incubating systems.

As we've assembled the data by year during which new units were added by the LZ 100, we've broken out the pace of growth for each of the organizations by unit. Some may argue that not all units in a senior living organization are the same and, in fact, should be analyzed by level of care, but each unit represents the capacity to serve an additional resident.

## Type of Growth: Expansion, New Communities, Merger/Acquisition/Affiliation, Disposition

Charts 5-8a-c and 5-9a-h describe how the largest 10, the largest 25, the largest 50 multi-sites and all 100 multi-site organizations have grown through expanding existing campuses, through construction of new communities or through merger/acquisition/affiliation and/or disposition. Properties have been classified according to the following definitions:

**Expansion:** the addition of new units to an existing community. Note: if a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition, or affiliation.

**Disposition:** The sale or closure of a community.

The charts at 5-8a-c analyze how communities have changed through the above described venues over a ten, twenty and greater than thirty year time period (1990-2011). More than 1,000 communities have been added as a result of campus expansion since 1980 (Chart 5-8a). Dispositions have also increased dramatically. What appears interesting is that of the 129 community dispositions which occurred from 1980-2011 among the LZ 100, more than a hundred of these dispositions occurred in the last decade or so (Chart 5-8c).

**Charts 5-9a-h are used to present** incremental growth by five-year period and cumulative growth by five-year period for each of the LZ 100 groupings (the largest 10, the largest 25, the largest 50, the largest 100) The second of each pair of charts shows the incremental change of the multi-sites, that is, on an annual basis how many existing properties have experienced expansion; how many properties have been added through new community construction or through merger, acquisition, and/or affiliation; and how many properties have been lost through disposition. For the incremental growth charts, the final five year period is provided with the current year shown alone. The cumulative growth charts provide the number of properties added or lost through each of these methods through the time period shown. For the cumulative charts, the final column shows the cumulative total of all LZ 100 activity through 1/1/12.

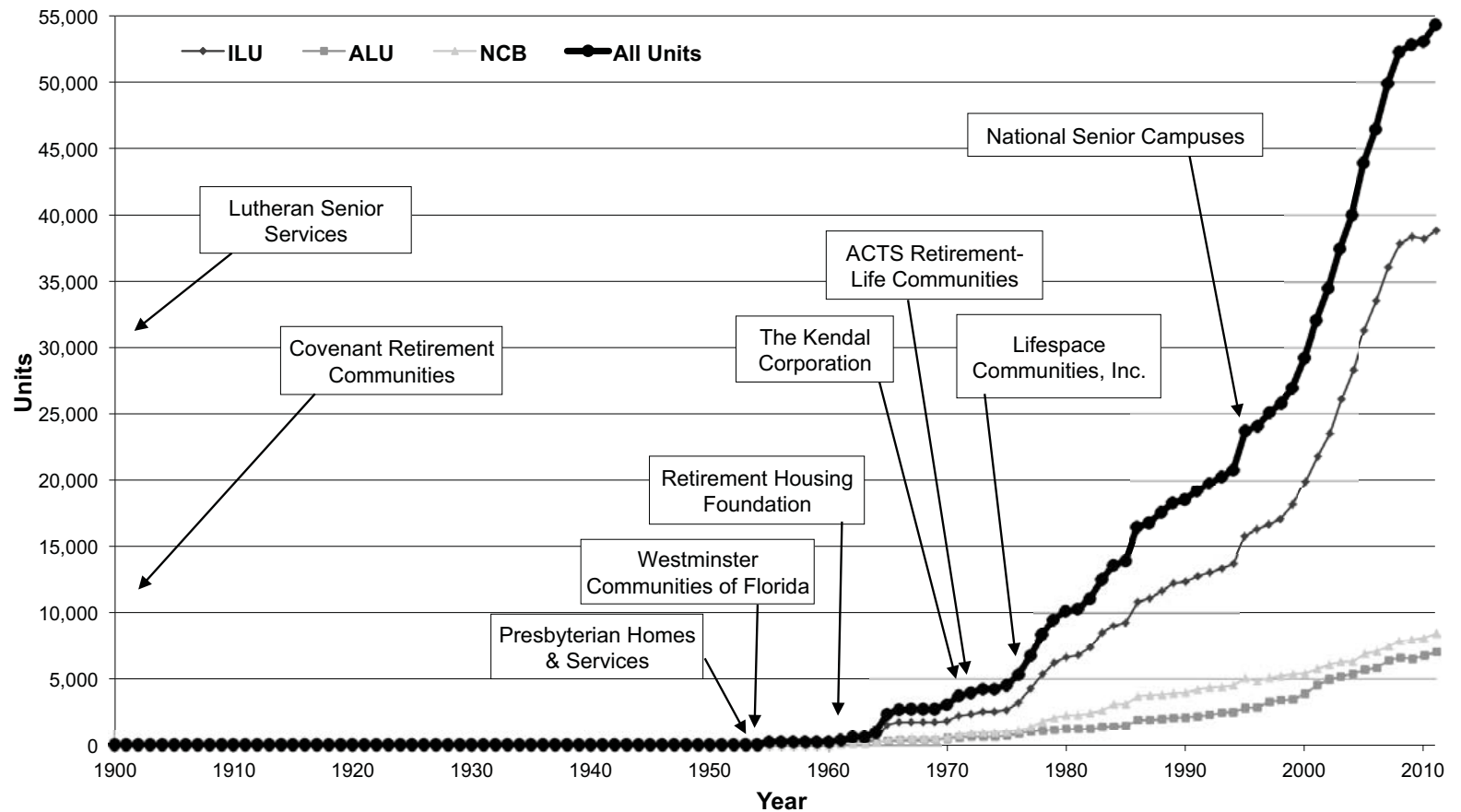
The incremental charts for each of the LZ 100 groupings (the largest 10, the largest 25, the largest 50, the largest 100) show that in the past five years growth continued, particularly in expansions. In 2011, the largest 10 expanded on 10 of their campuses, adding three communities through new construction and ten communities through merger, acquisition, and/or affiliation (Chart 5-9b). Multi-site organizations appear to be maximizing the utilization of their existing real estate, renovating and expanding on existing property whenever possible. The period of 1/1/05 through 1/1/09 shows unprecedented growth for the prior five-year period when compared with the previous five-year periods since 1980, however, the 2010-2011 timeframe shows an uptick in expansions (Chart 5-10). Organizations are balancing their growth with a continued focus on renovating and replacing of older units.

As noted above, dispositions have increased dramatically in the last six years. In the period from 1995 to 1999, just ten dispositions had occurred for the entire LZ 100. In the five-year period from 2000 to 2004, 23 dispositions occurred; in the next five years, there were 62 dispositions. This recent acceleration in pace of dispositions was also evident in 2011, with fourteen total dispositions for the LZ 100 (Chart 5-9h). These dispositions are predominantly nursing home closures or sales. Occasionally the sale of a not-for-profit nursing home may go to another not-for-profit, but generally the winning bidders are for-profit senior living providers. This type of activity may also increase in the current economic climate. Finally, as noted earlier, not-for-profit organizations frequently look to like-minded organizations with which to affiliate or merge. In today's economic climate, an increasing number of single-site not-for-profits may look to not-for-profit multi-sites to forge relationships that will enhance their mission and purpose. Charts 5-10 through 5-13 examine the individual types of growth with listings of the specific properties under construction, acquired through merger and/or affiliation, or identified as dispositions. Maps show the respective locations of these communities.

## 5-1 2012 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

5-1a FROM 1900 (Excludes Evangelical Lutheran Good Samaritan Society)

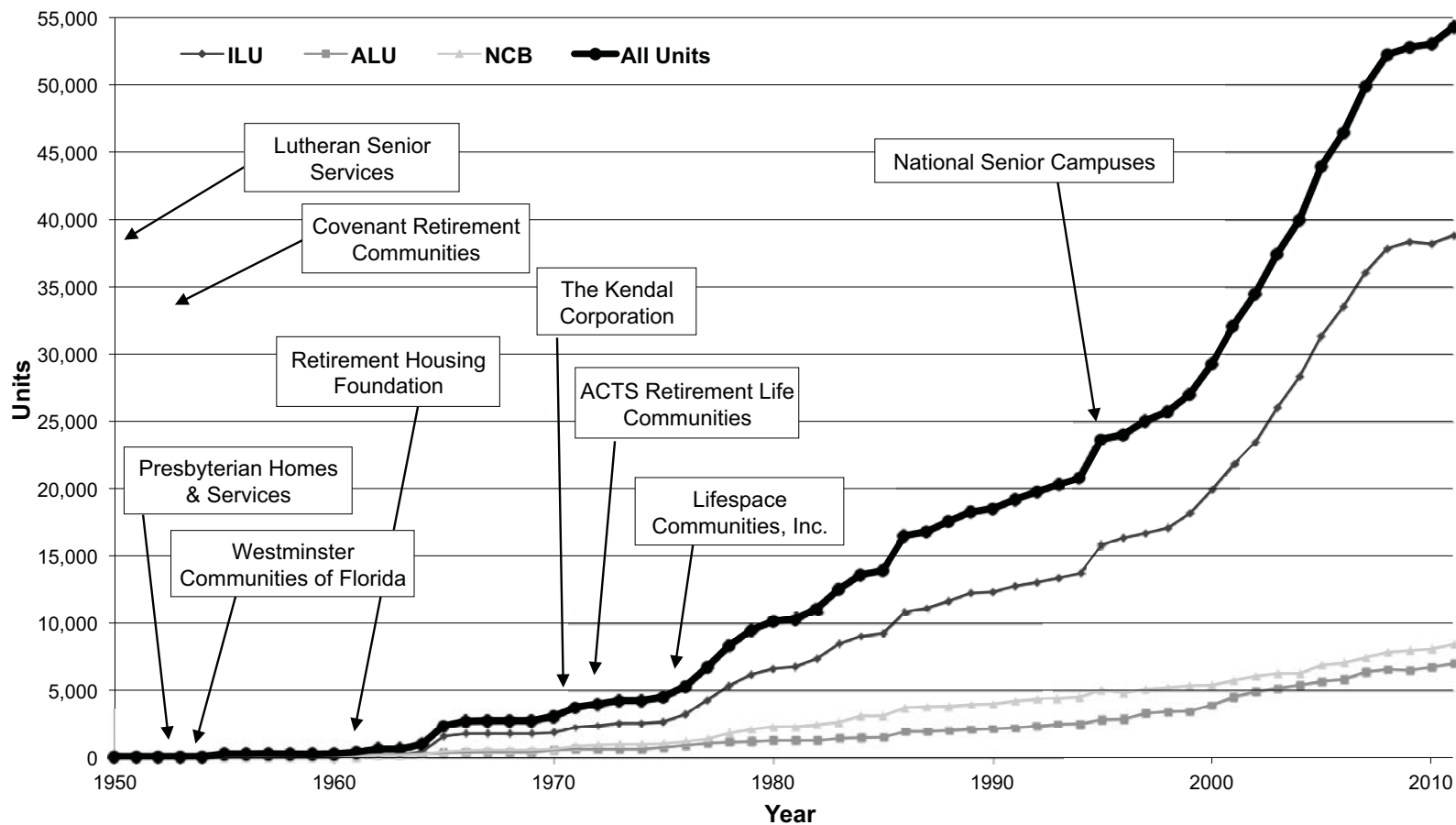




## 5-1 2012 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

5-1b FROM 1950 (Excludes Evangelical Lutheran Good Samaritan Society)

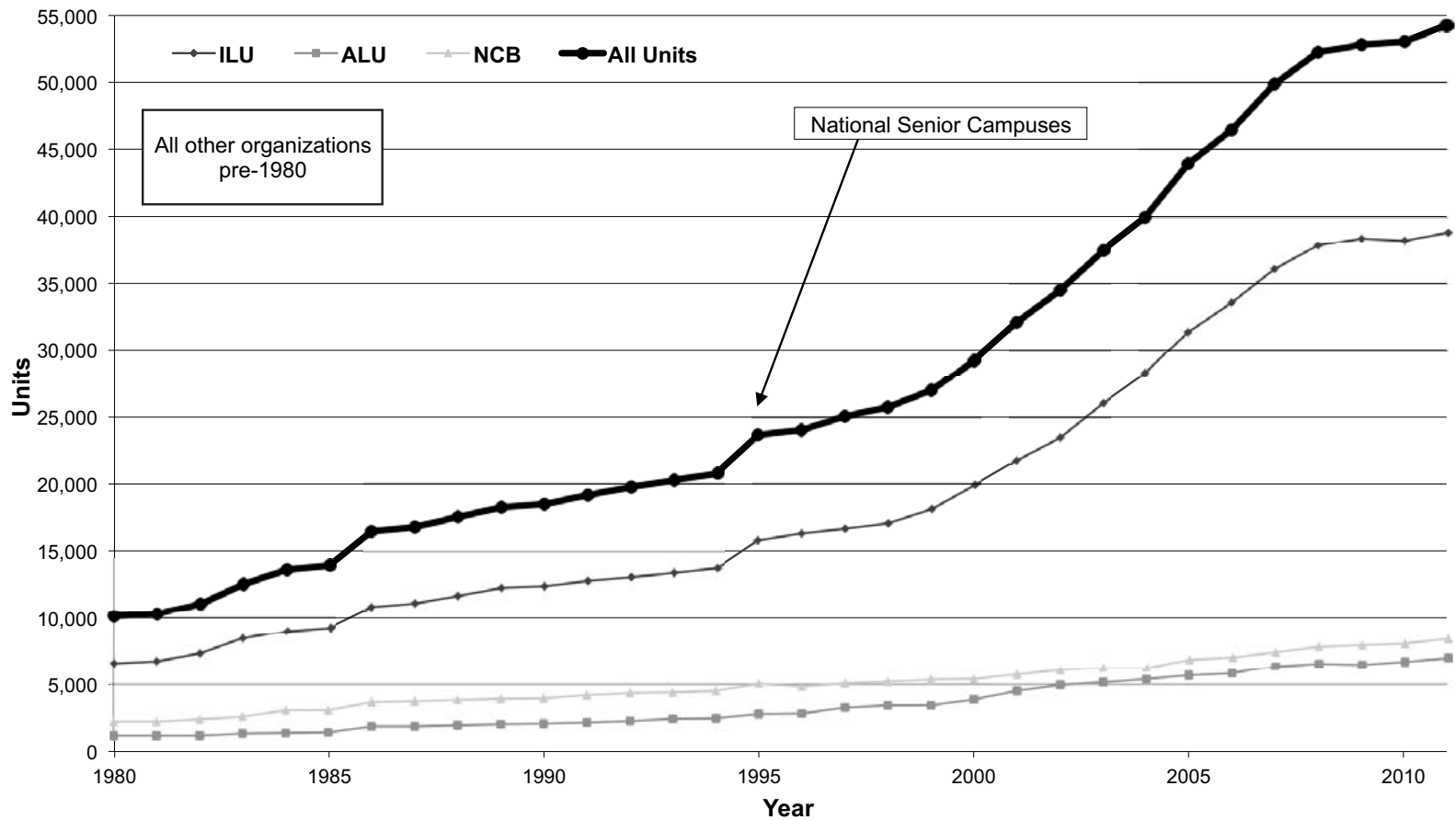




## 5-1 2012 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

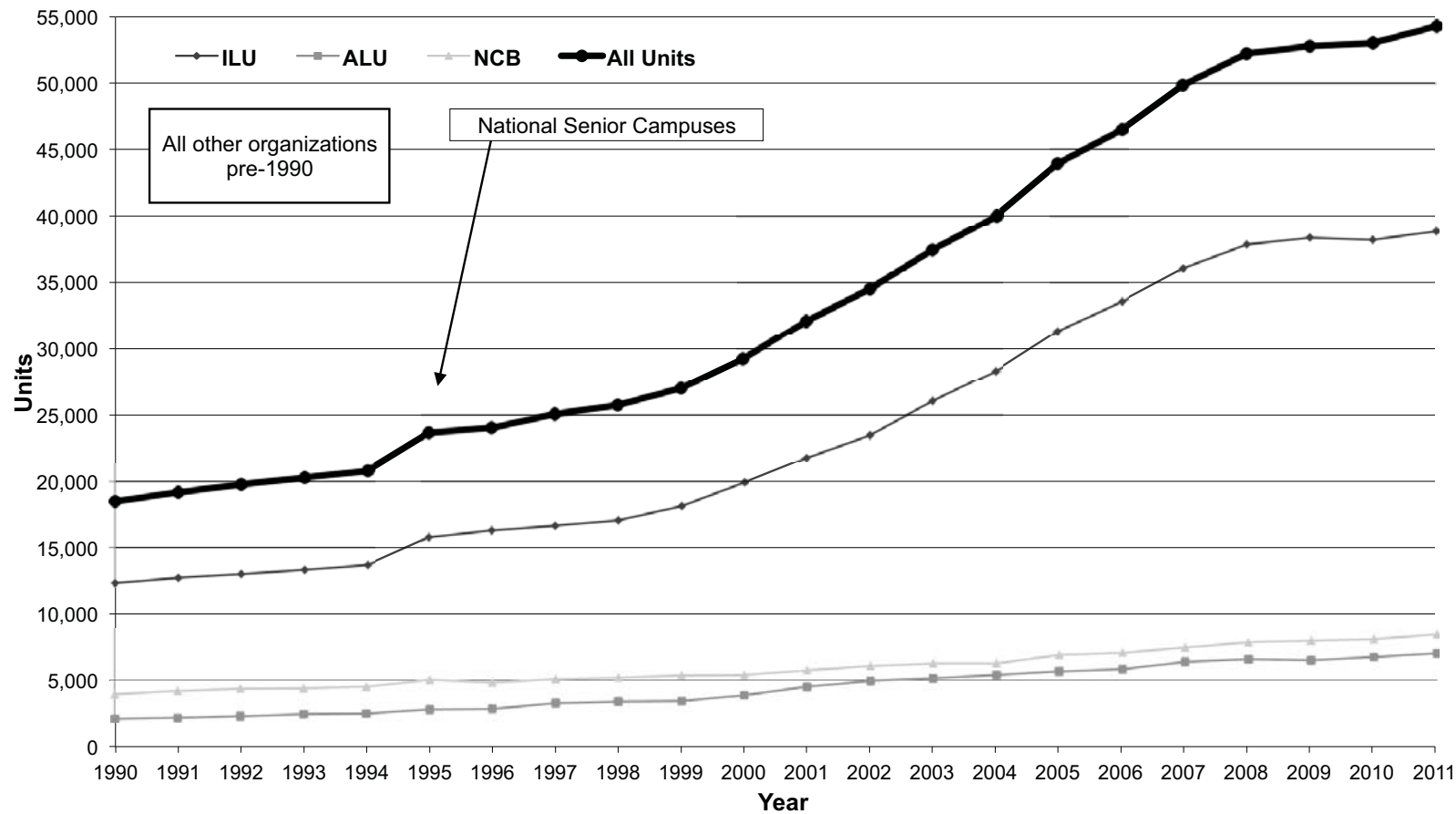
5-1c FROM 1980 (Excludes Evangelical Lutheran Good Samaritan Society)



## 5-1 2012 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

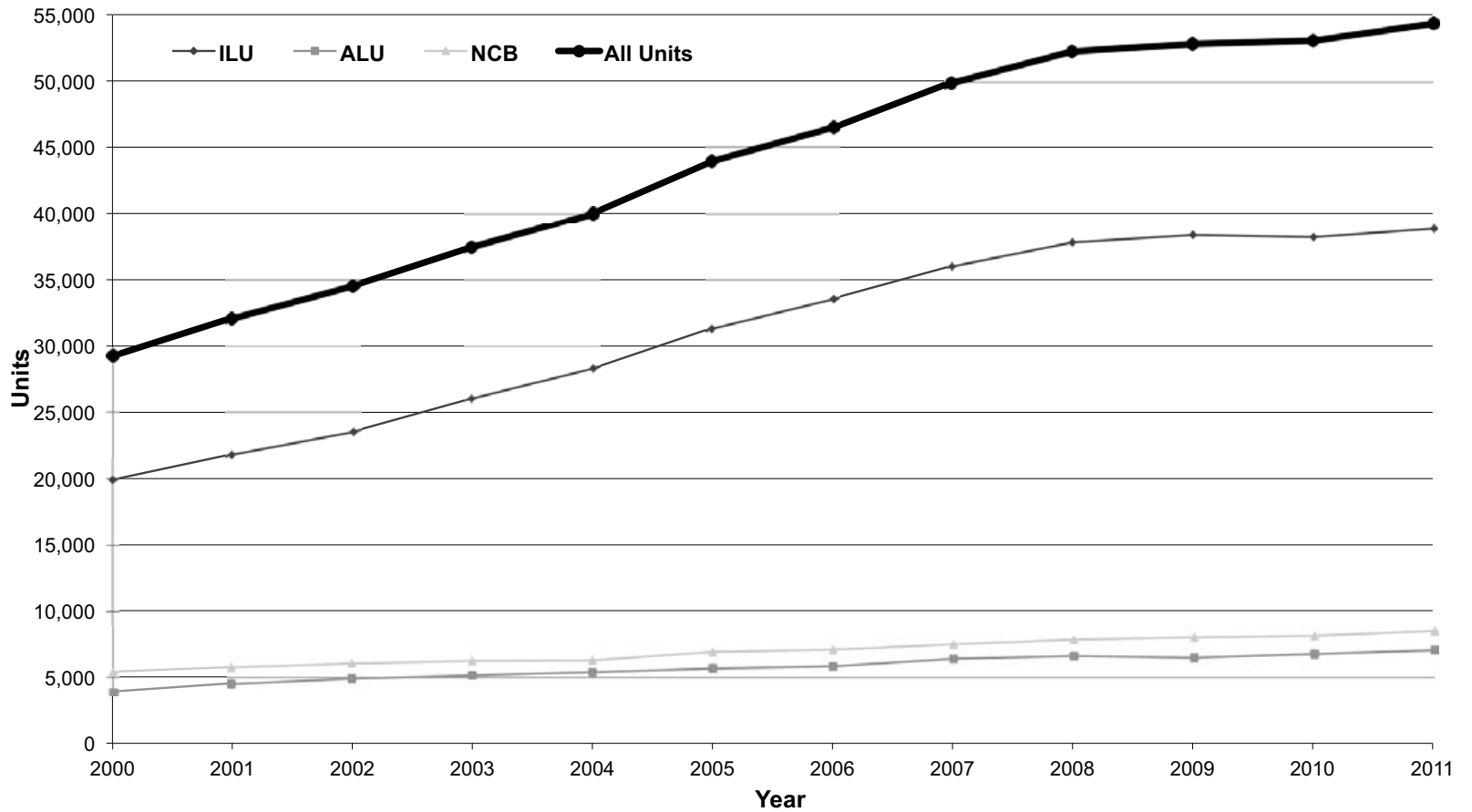
5-1d FROM 1990 (Excludes Evangelical Lutheran Good Samaritan Society)



## 5-1 2012 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

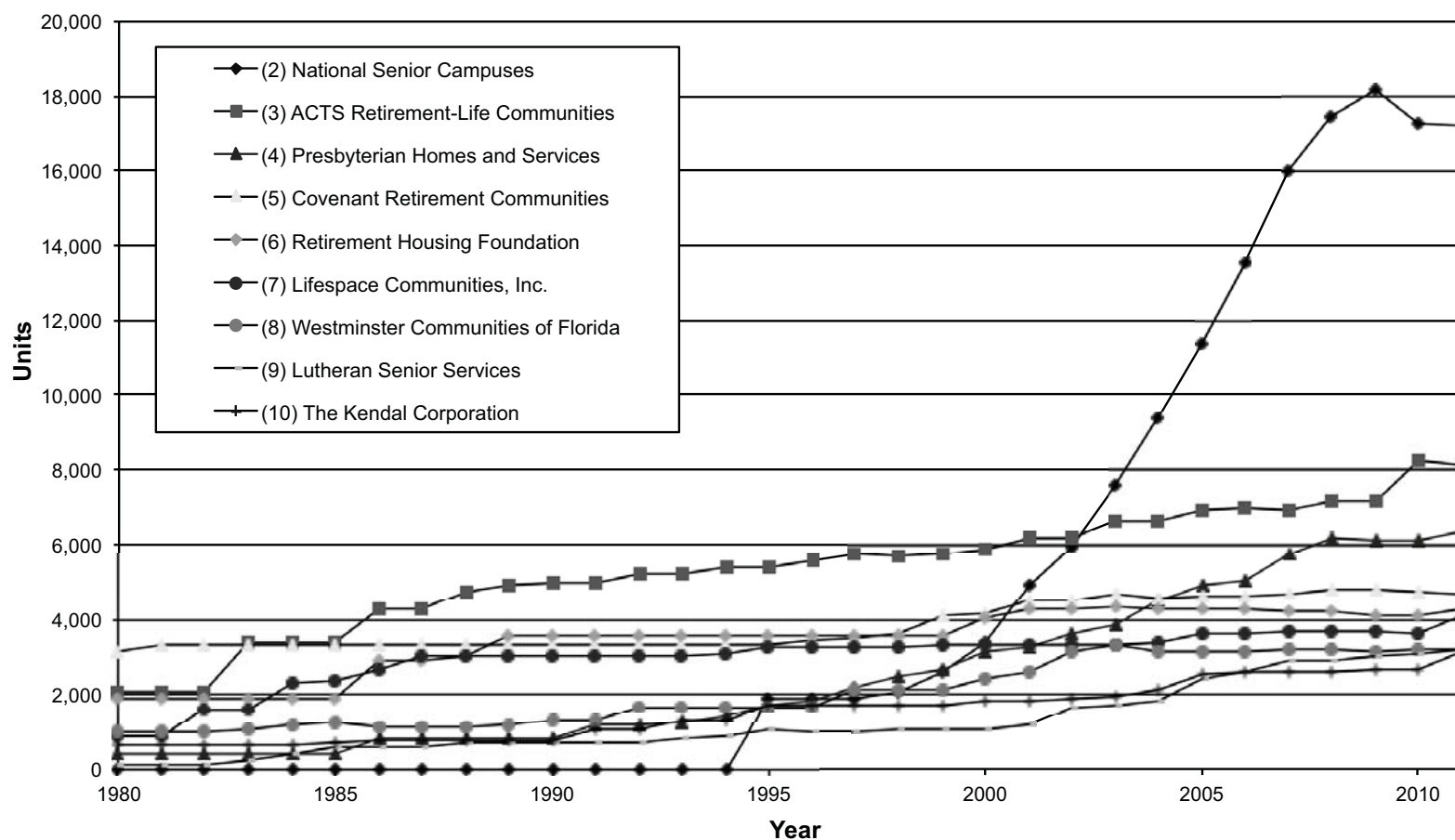
5-1e FROM 2000 (Excludes Evangelical Lutheran Good Samaritan Society)



## 5-2 2012 LeadingAge Ziegler 100

Growth: Growth of Total Senior Living Units for Largest 10 Systems

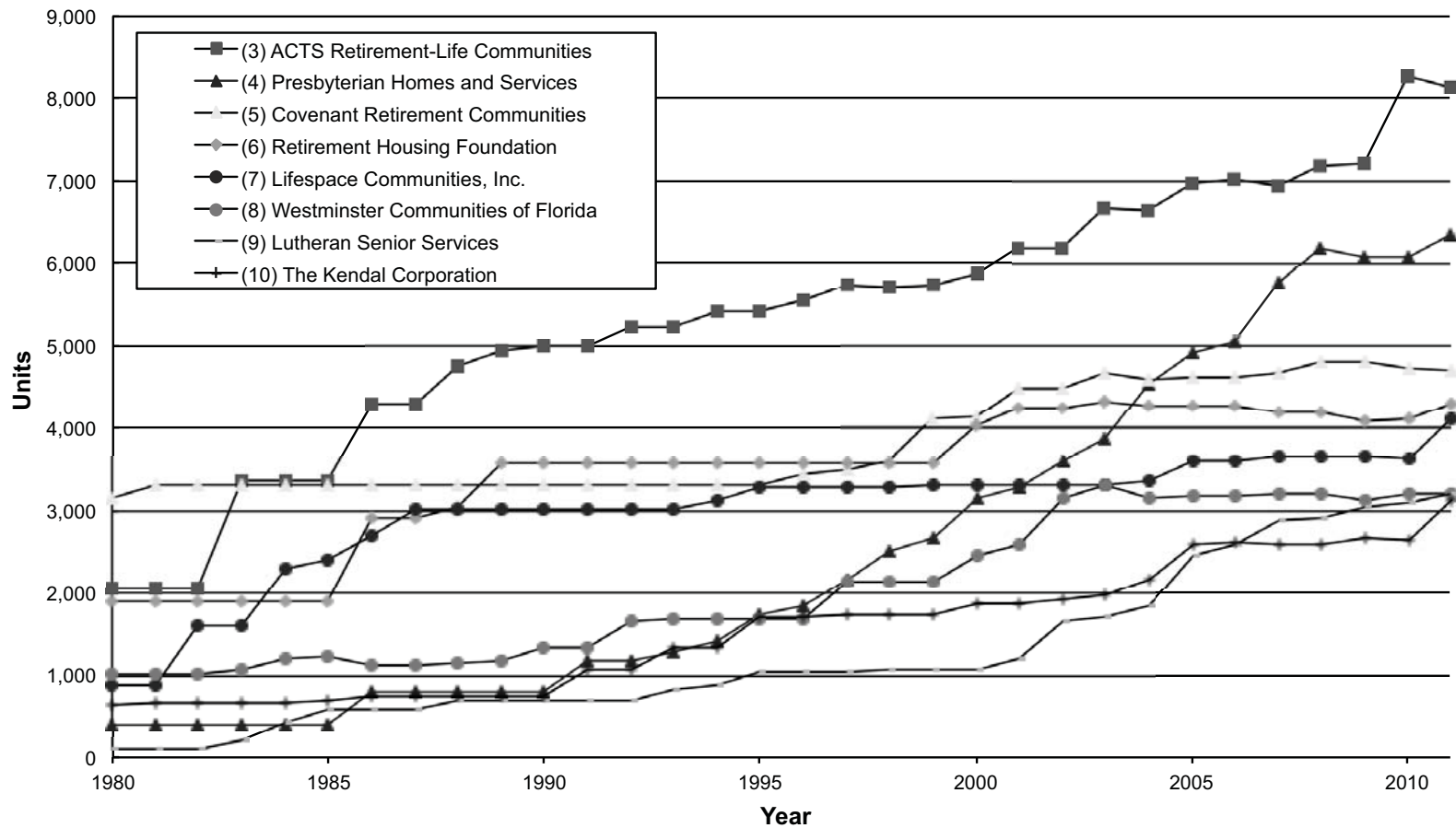
5-2a FROM 1980 (Excludes Evangelical Lutheran Good Samaritan Society)



## 5-2 2012 LeadingAge Ziegler 100

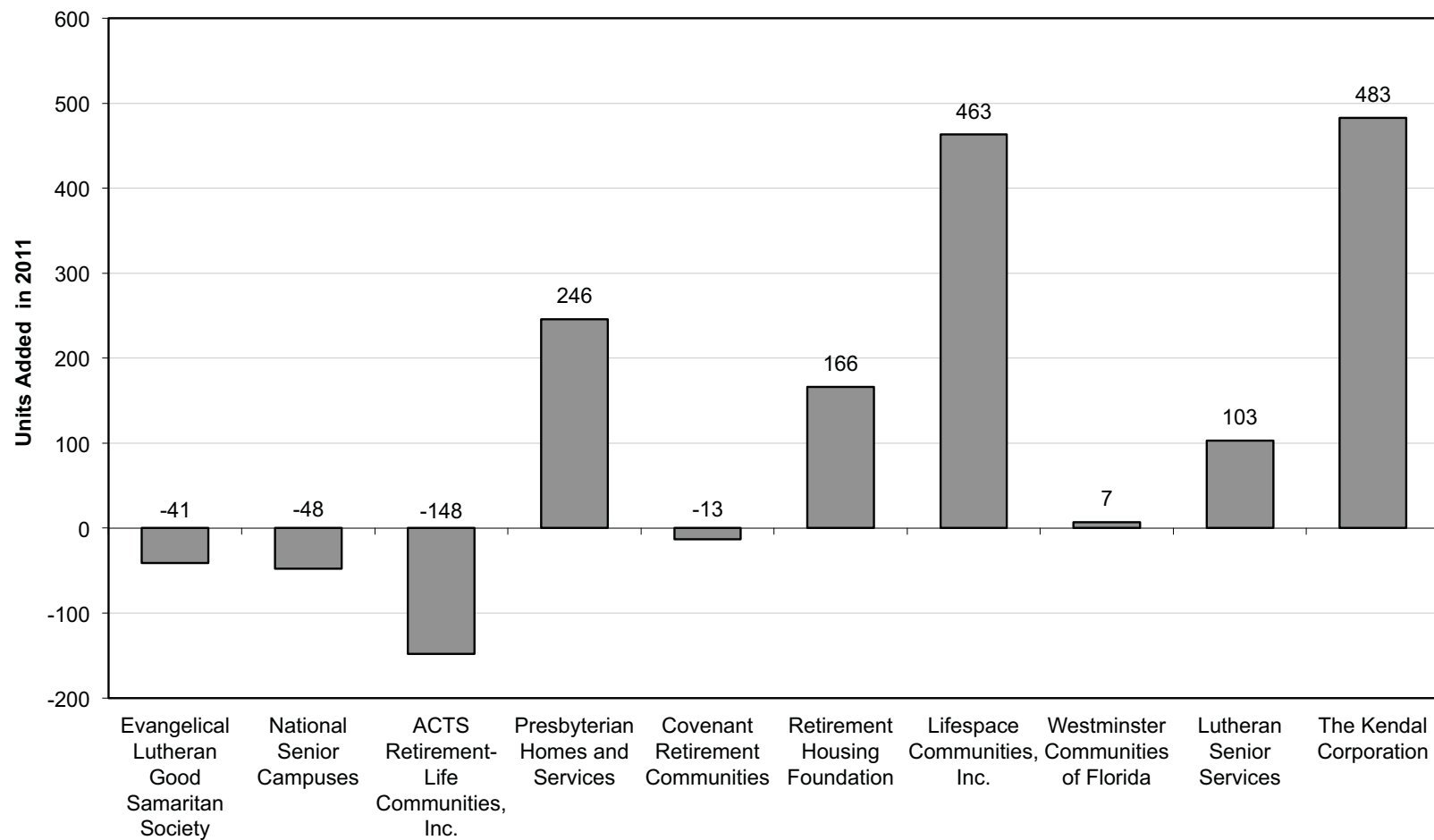
Growth: Growth of Total Senior Living Units for Largest 10 Systems

**5-2b FROM 1980 (Excludes Evangelical Lutheran Good Samaritan Society & National Senior Campuses)**



## 5-3 2012 LeadingAge Ziegler 100

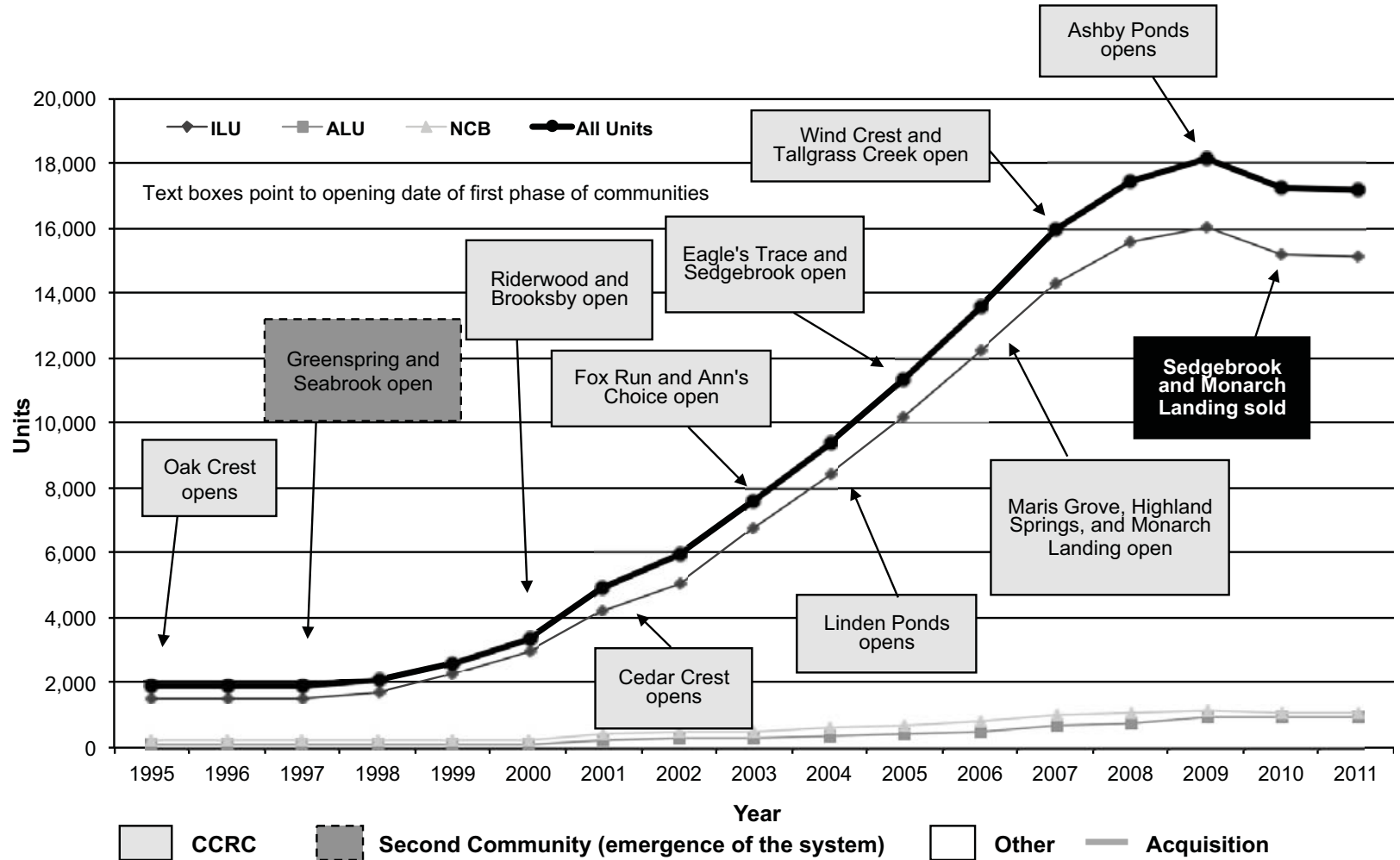
Growth: Rate of Growth for Largest 10 Systems



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

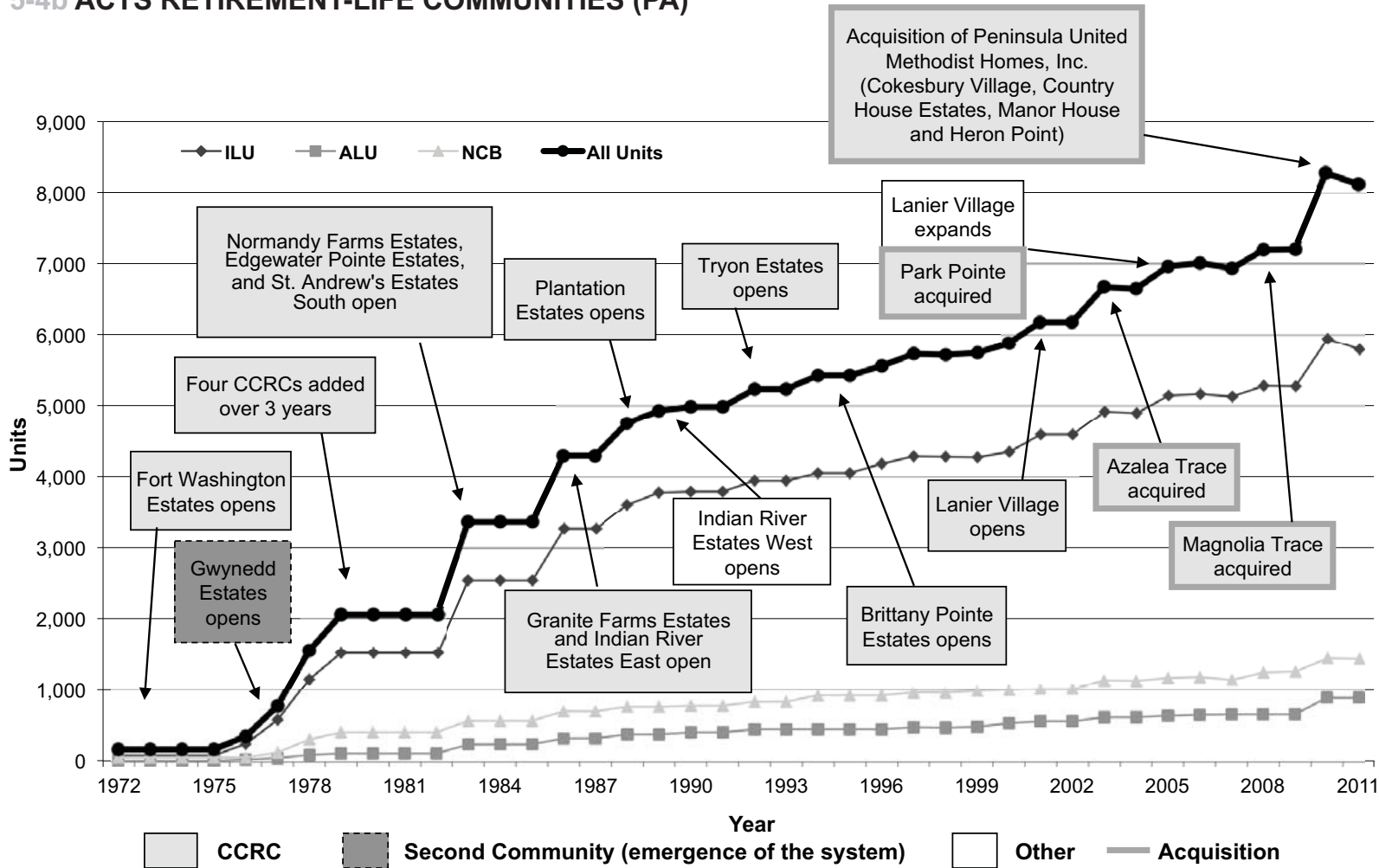
5-4a NATIONAL SENIOR CAMPUSES (MD)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

### 5-4b ACTS RETIREMENT-LIFE COMMUNITIES (PA)

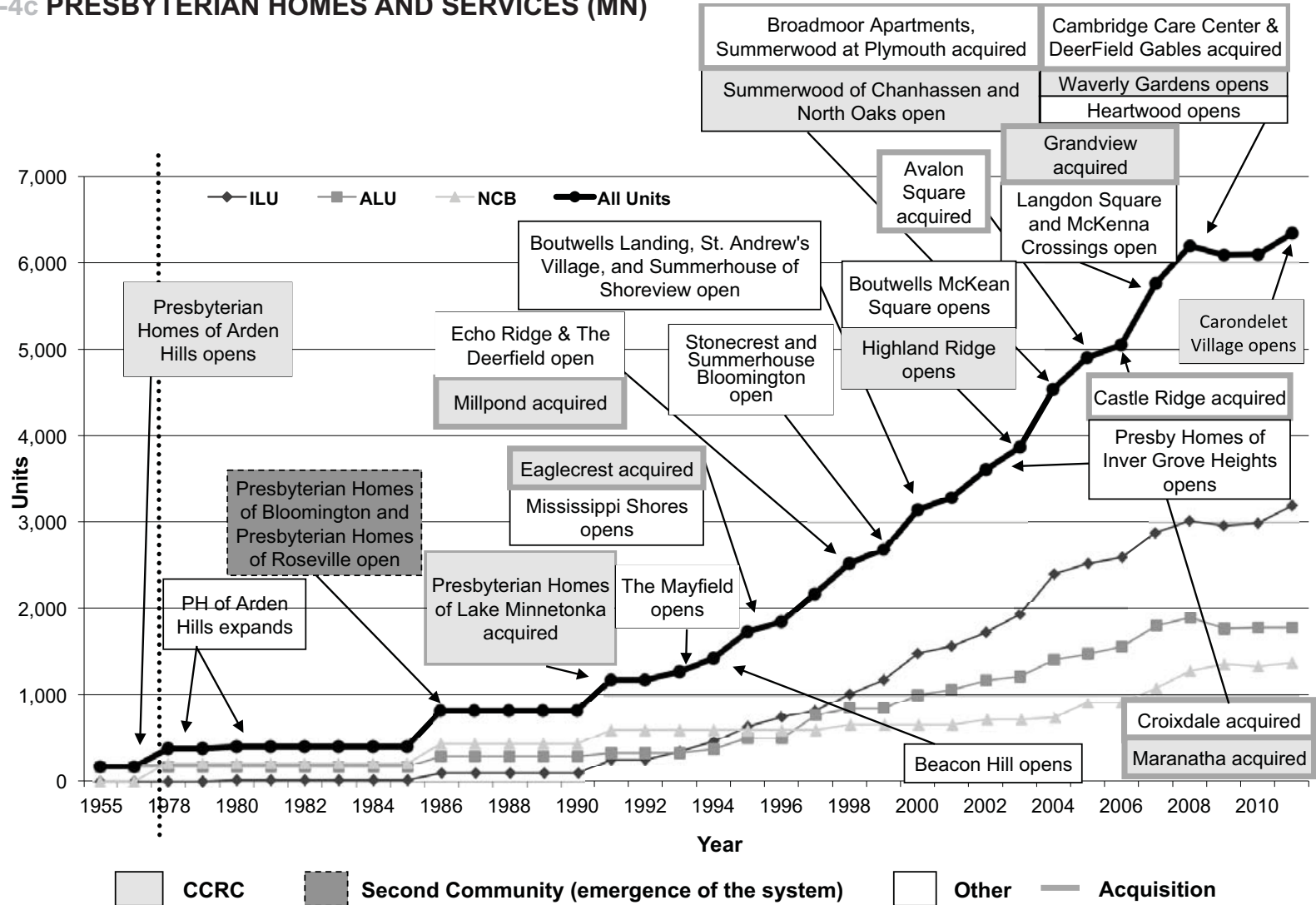




## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

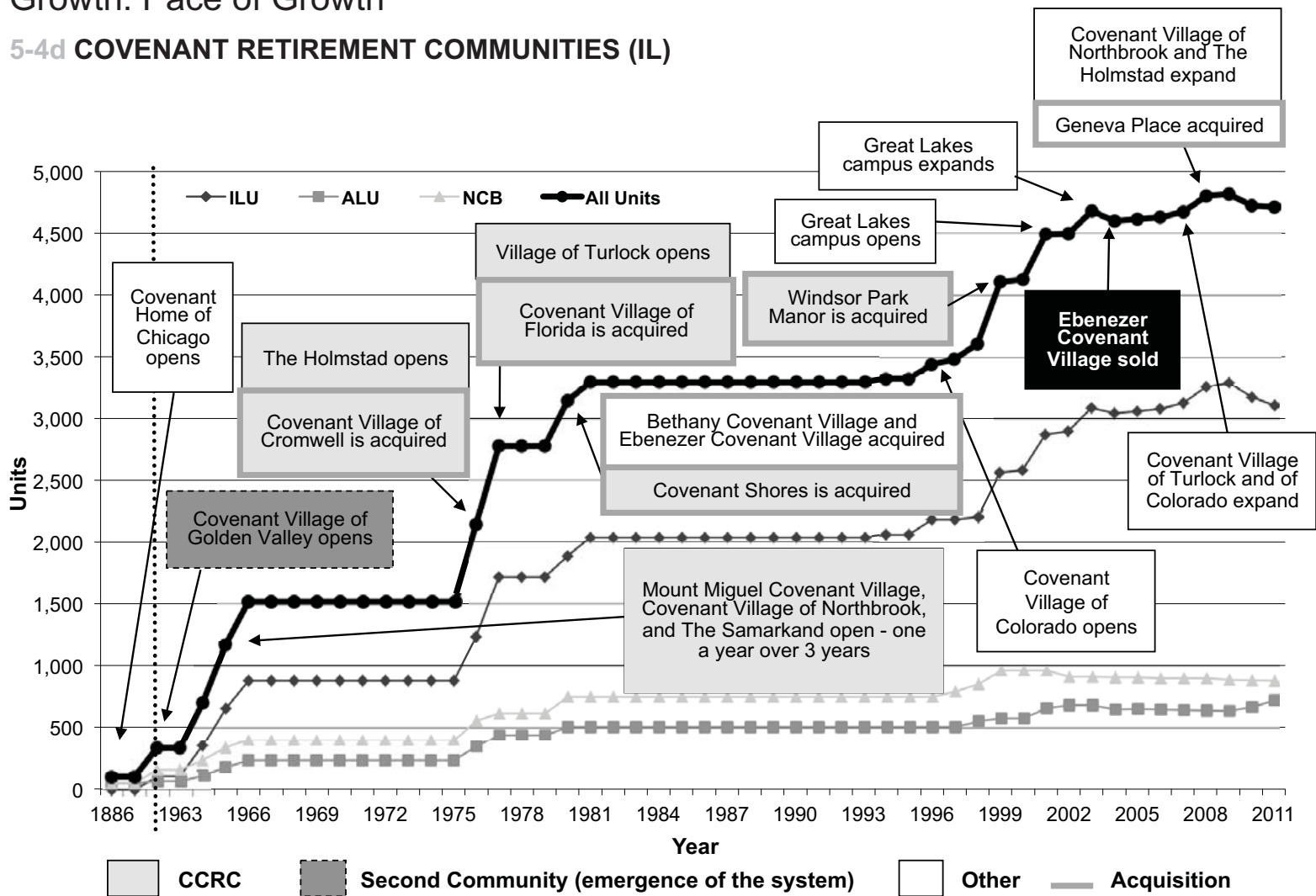
### 5-4c PRESBYTERIAN HOMES AND SERVICES (MN)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

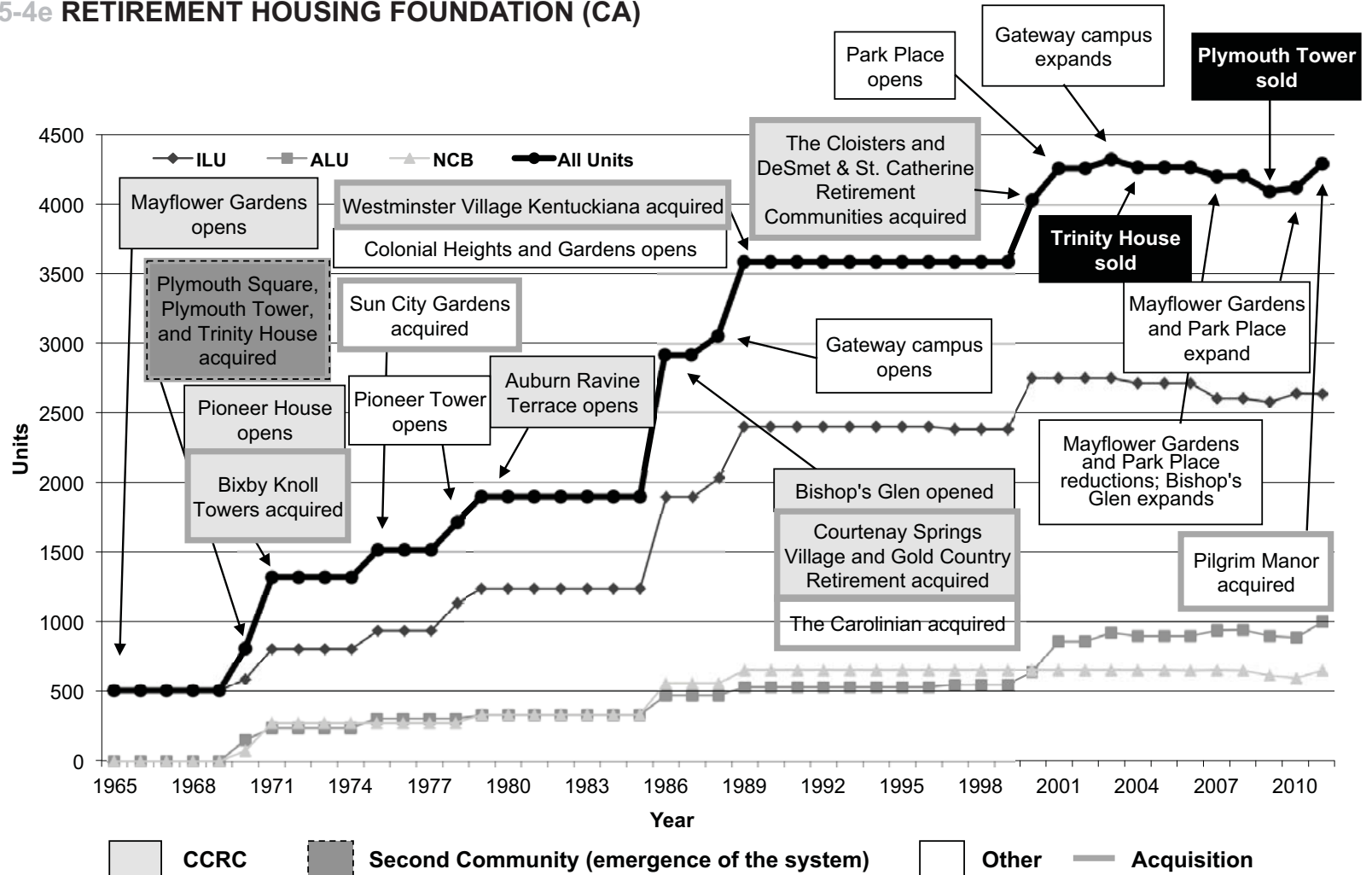
### 5-4d COVENANT RETIREMENT COMMUNITIES (IL)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

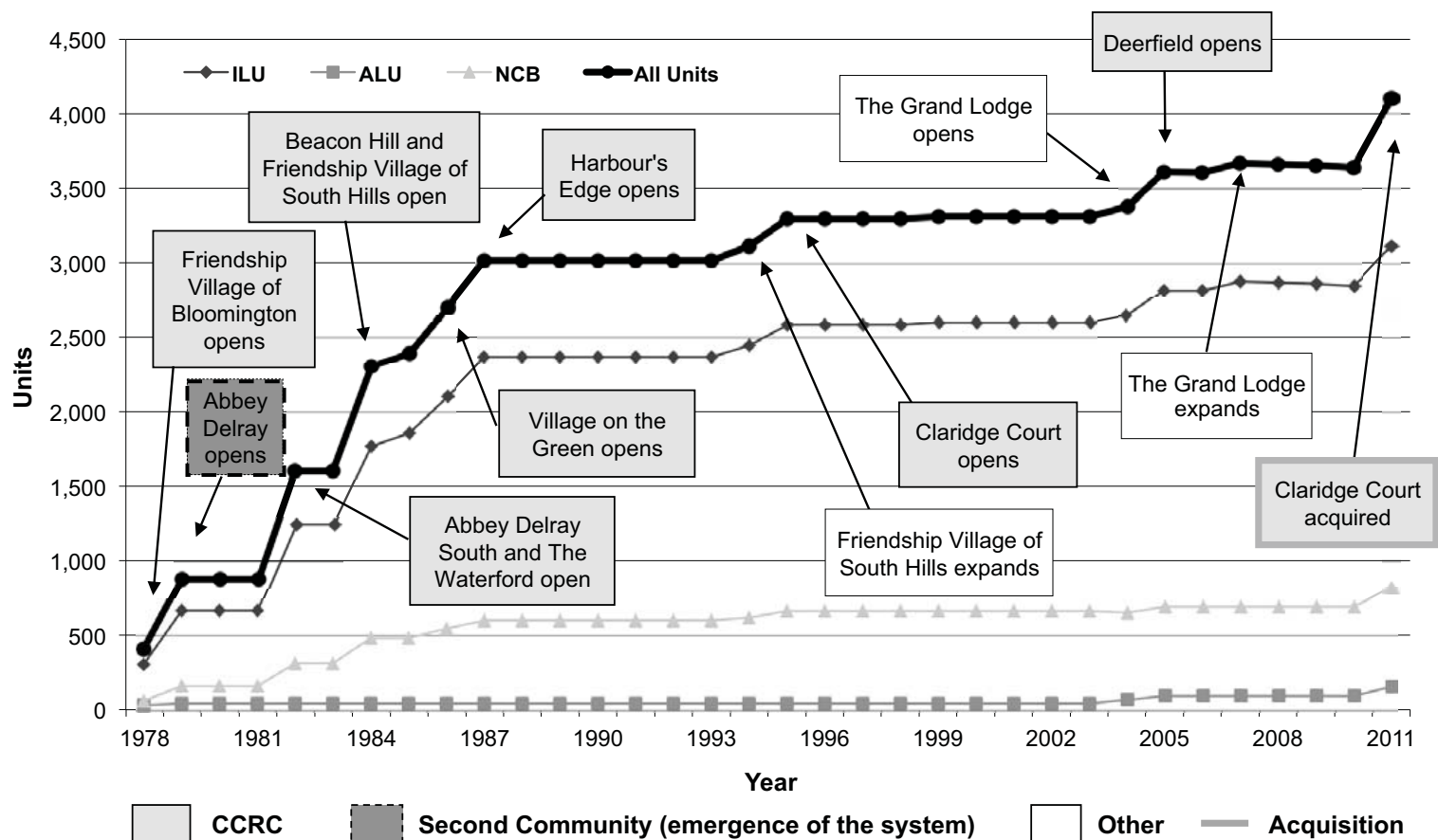
5-4e RETIREMENT HOUSING FOUNDATION (CA)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

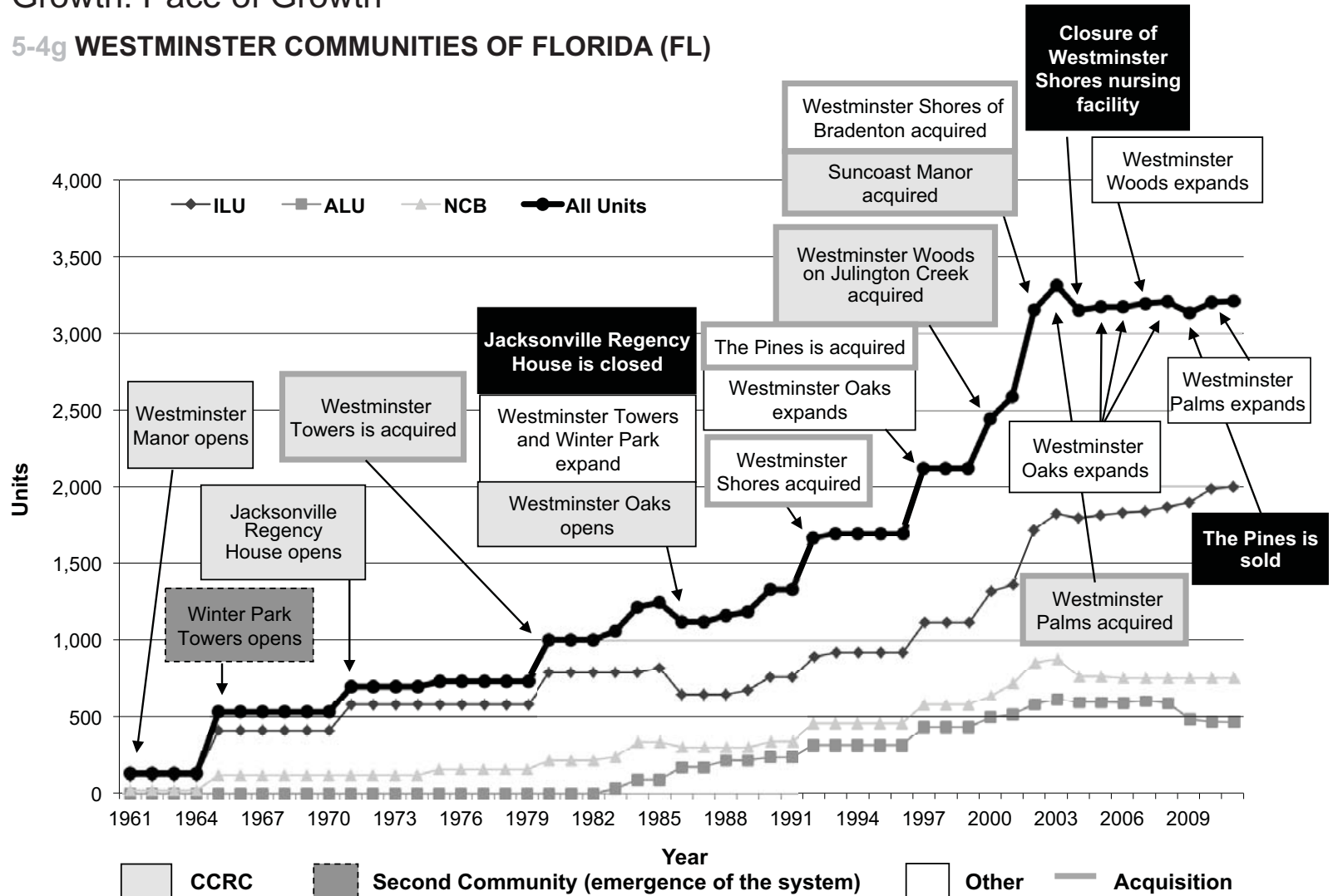
5-4f LIFESPACE COMMUNITIES, INC. (IA)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

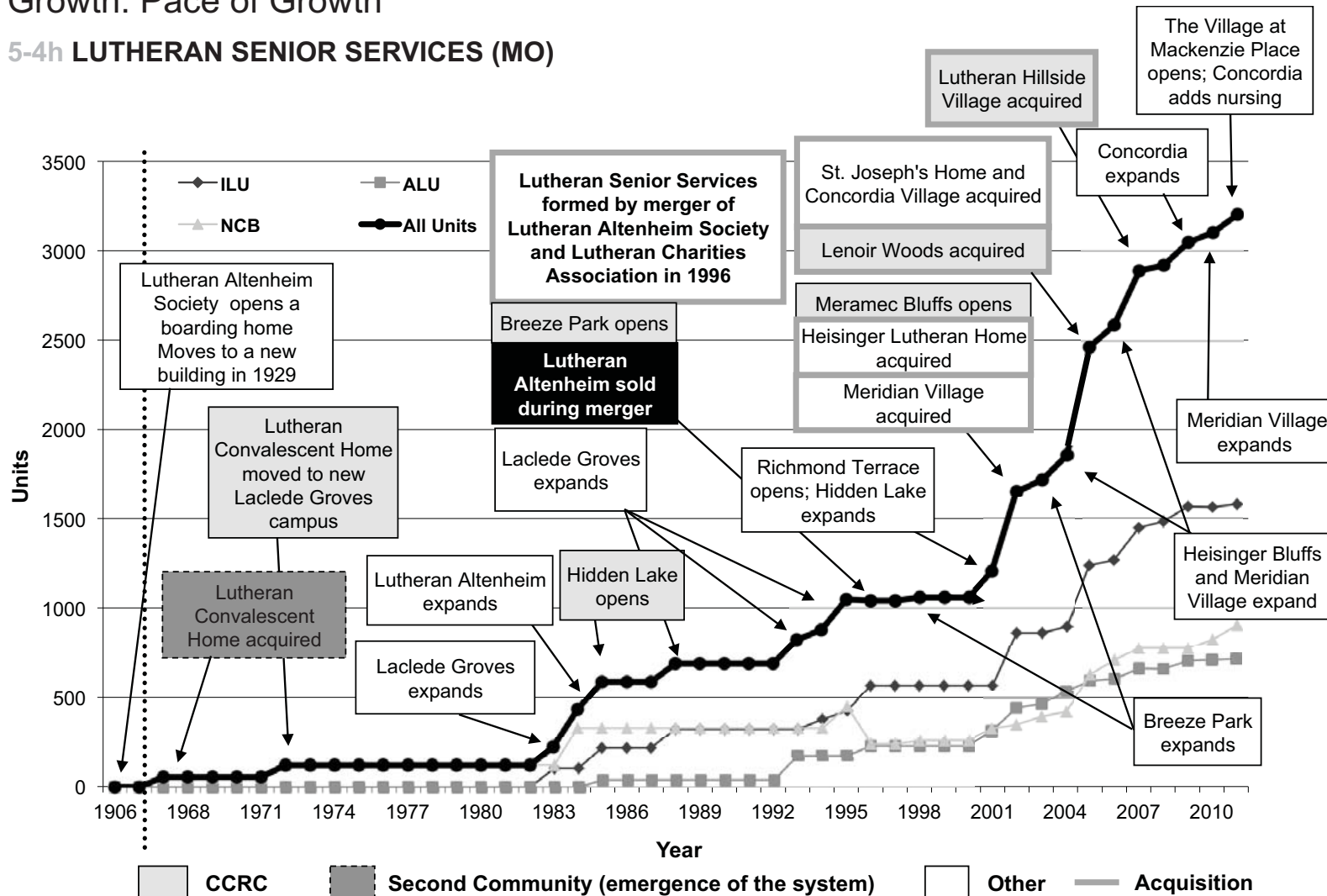
5-4g WESTMINSTER COMMUNITIES OF FLORIDA (FL)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

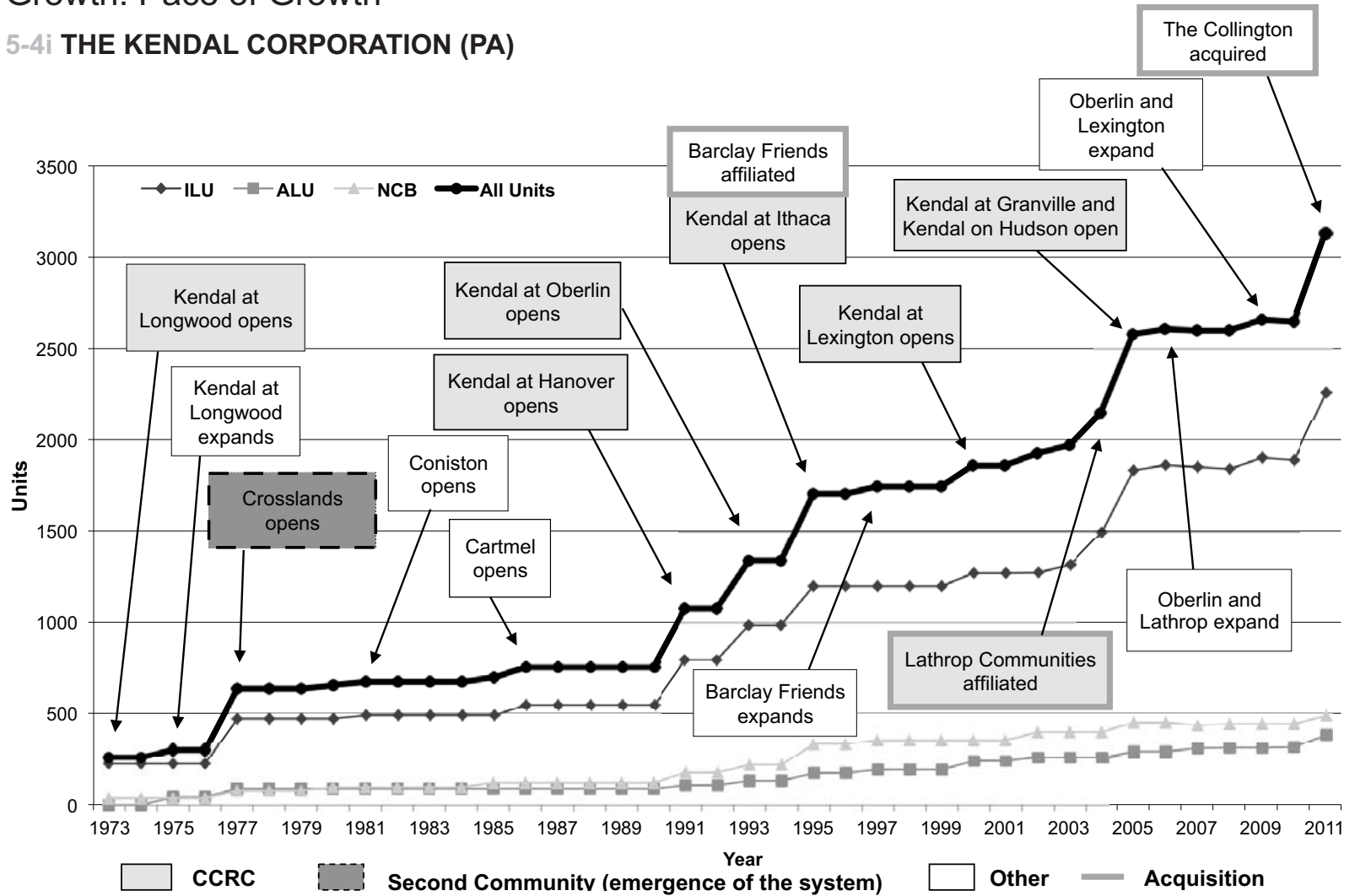
5-4h LUTHERAN SENIOR SERVICES (MO)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4i THE KENDAL CORPORATION (PA)

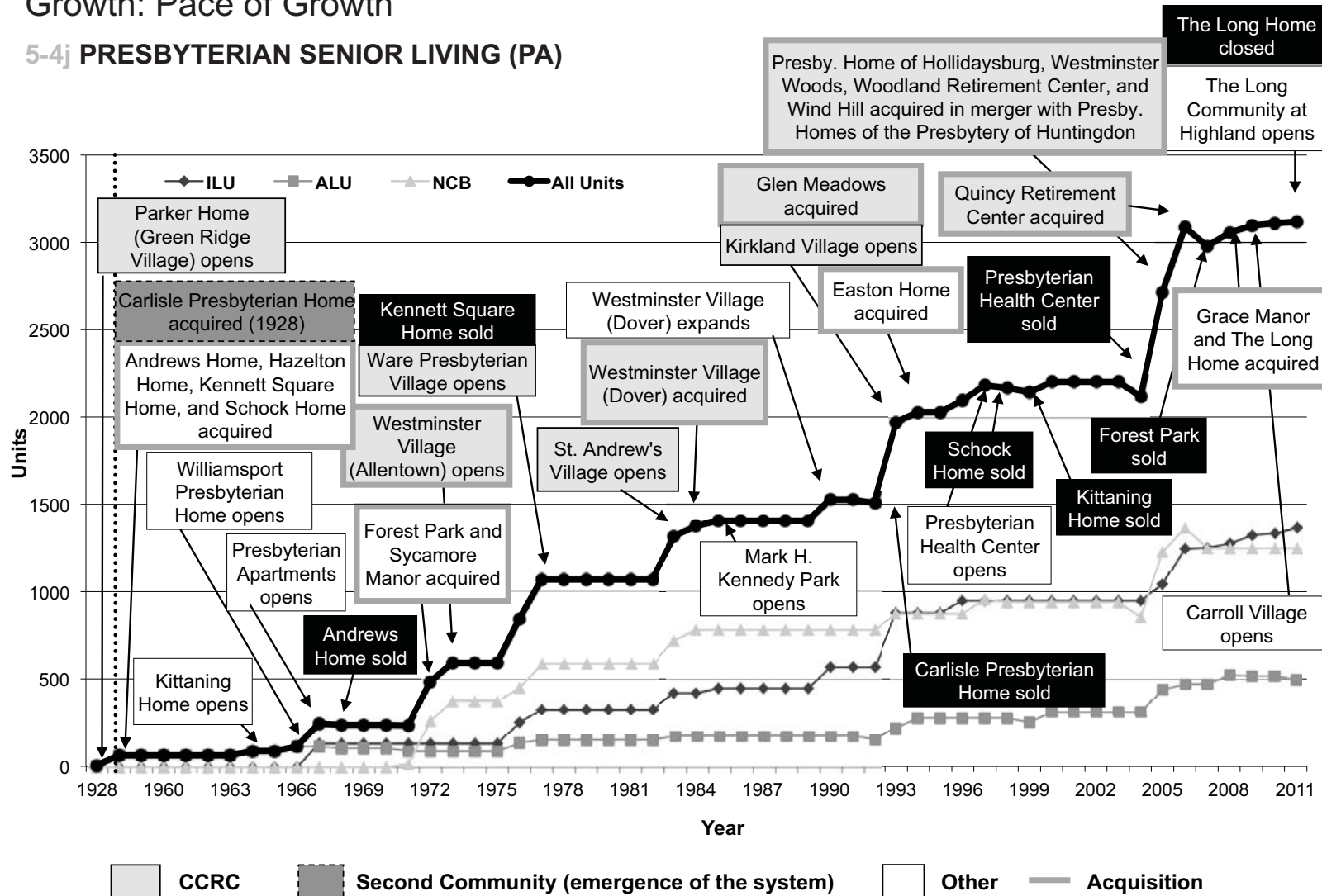




## 5-4 2012 LeadingAge Ziegler 100

### Growth: Pace of Growth

#### 5-4j PRESBYTERIAN SENIOR LIVING (PA)

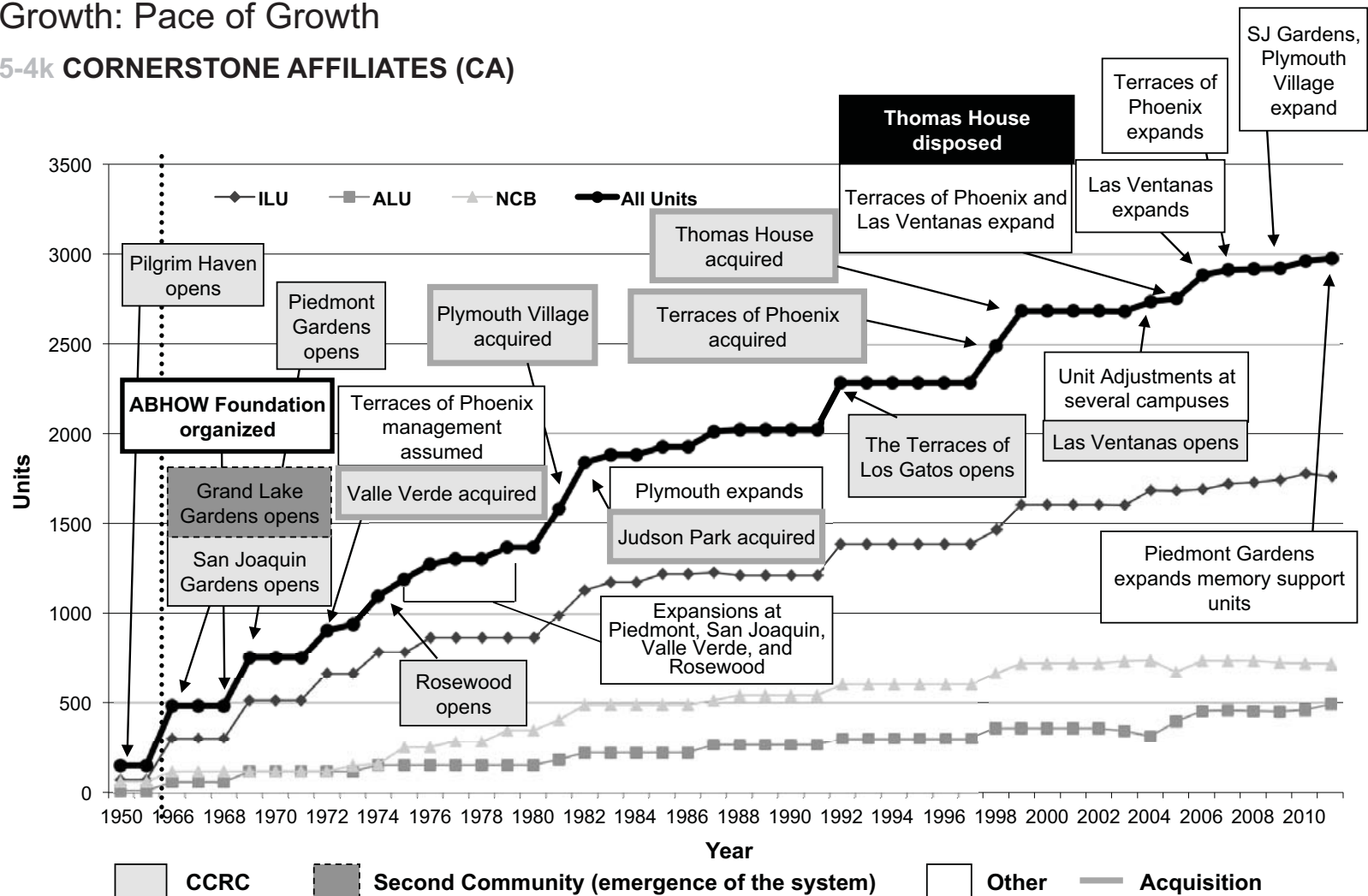




## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

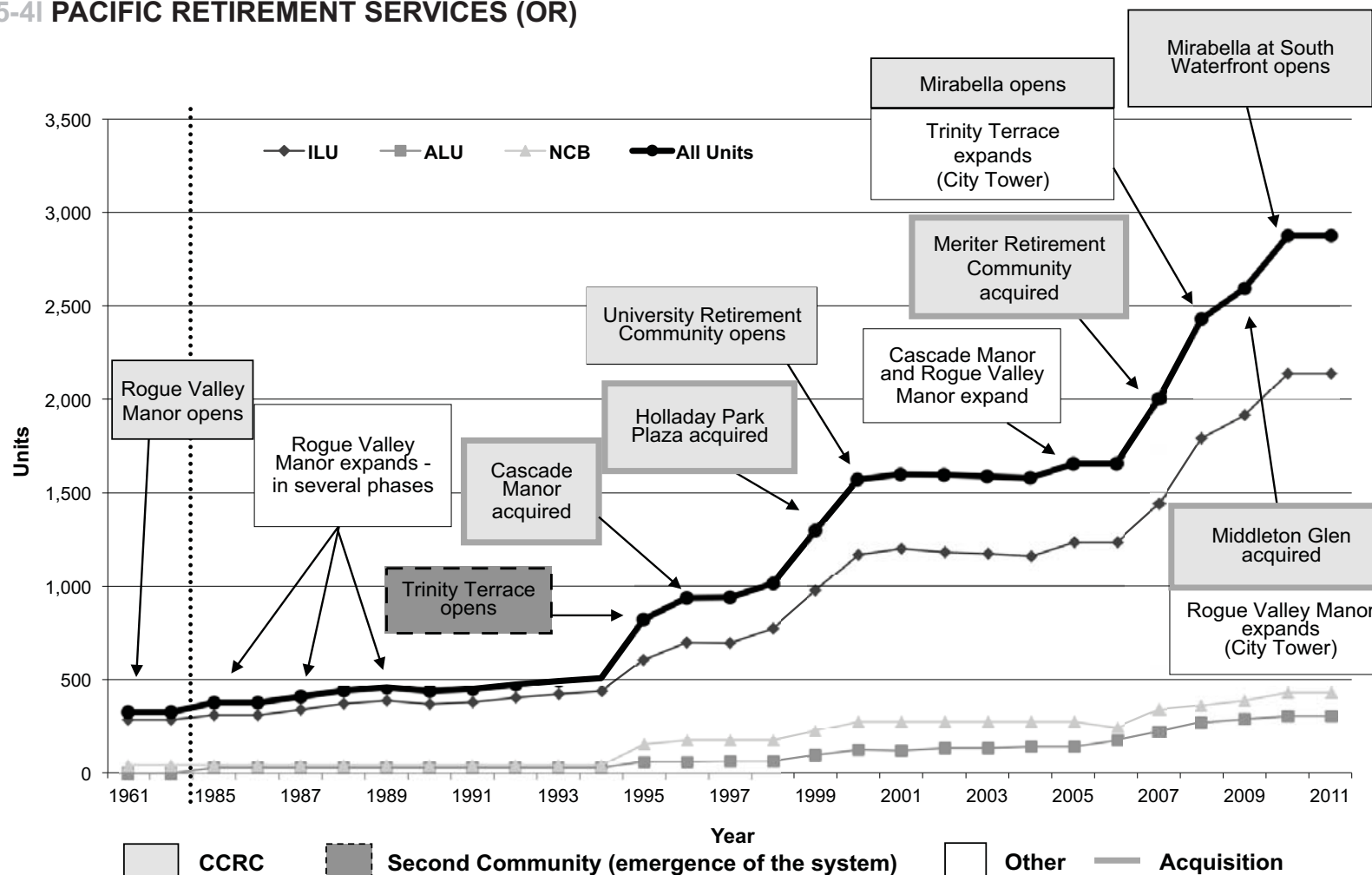
5-4k CORNERSTONE AFFILIATES (CA)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

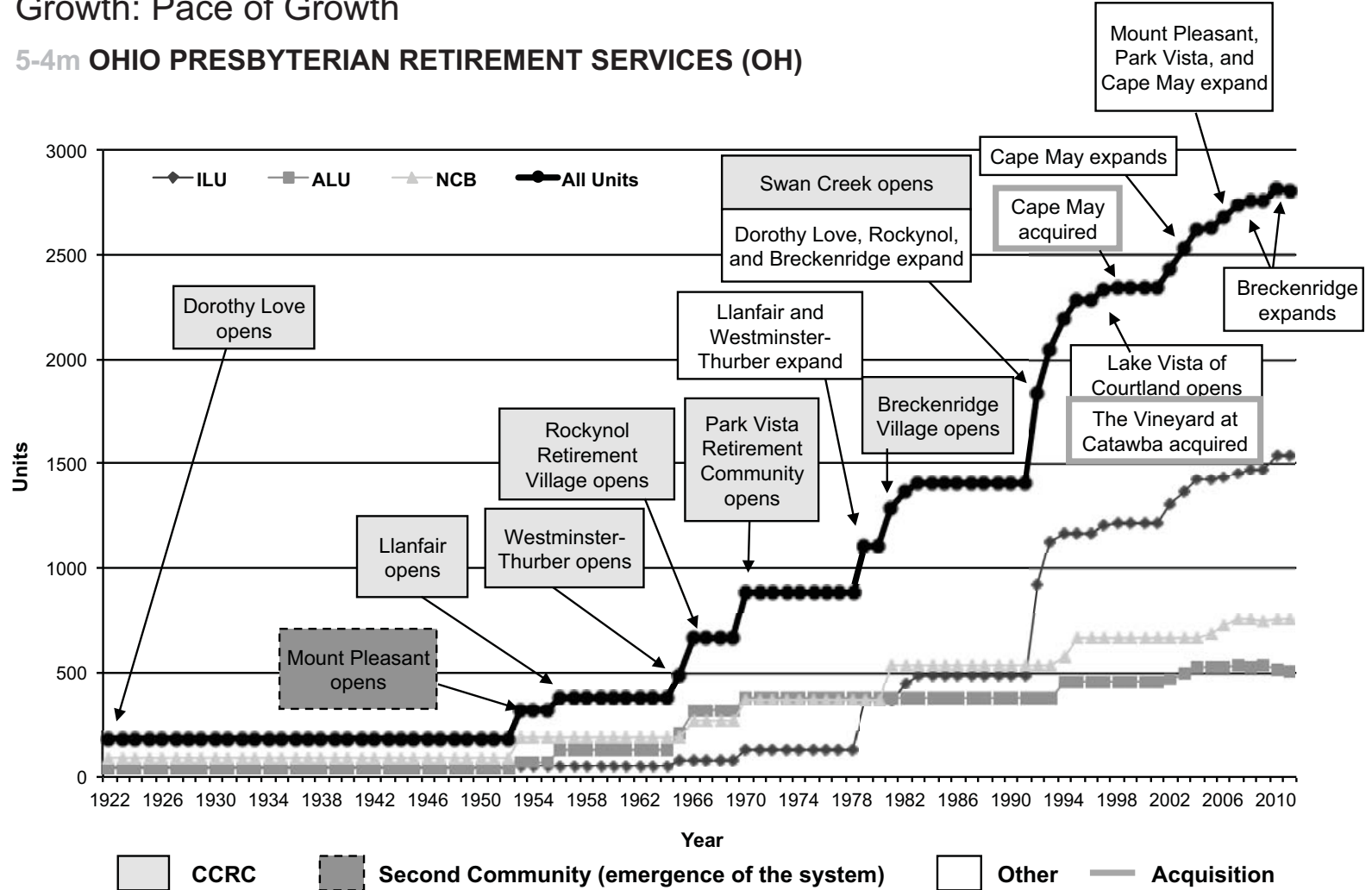
5-4I PACIFIC RETIREMENT SERVICES (OR)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

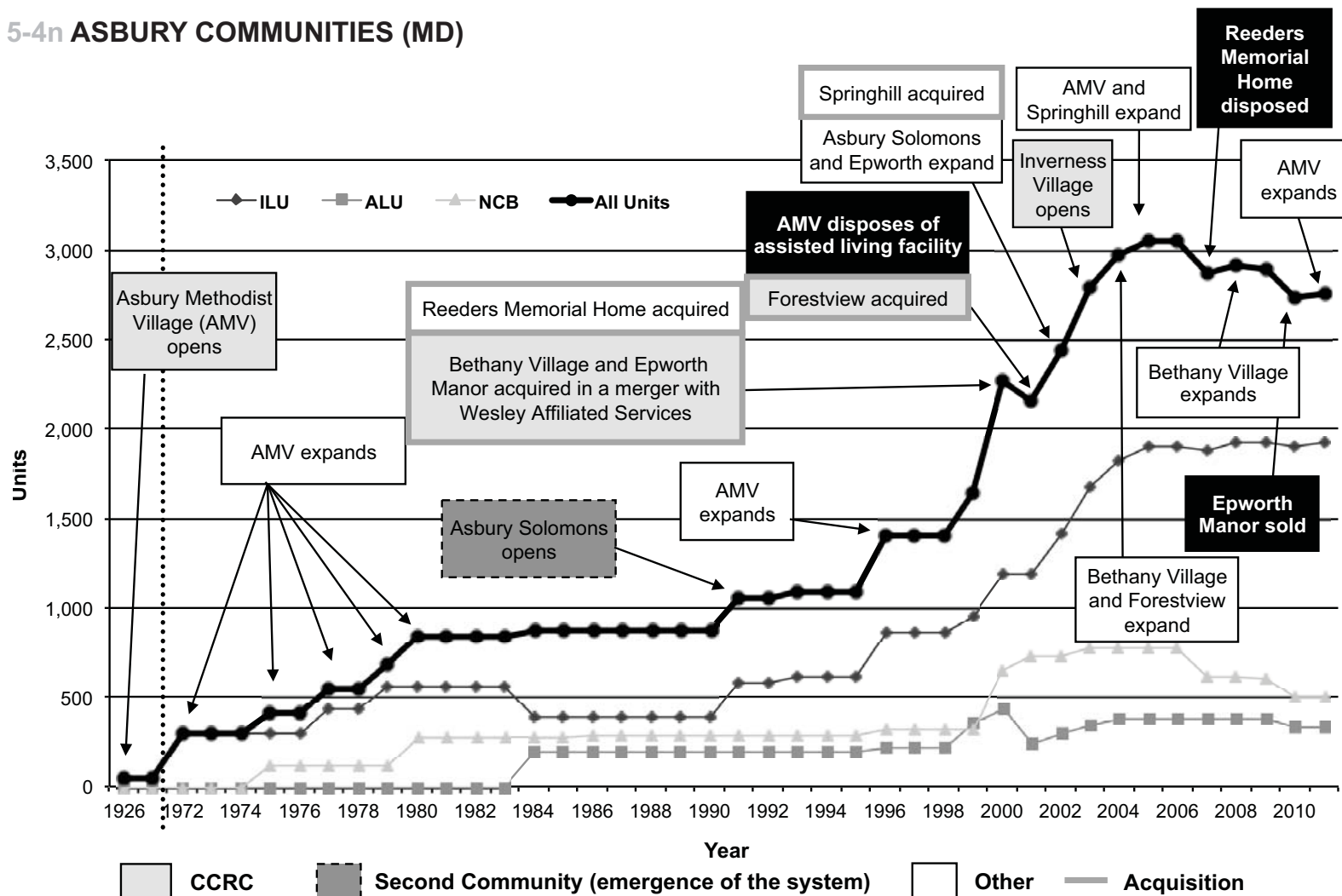
5-4m OHIO PRESBYTERIAN RETIREMENT SERVICES (OH)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

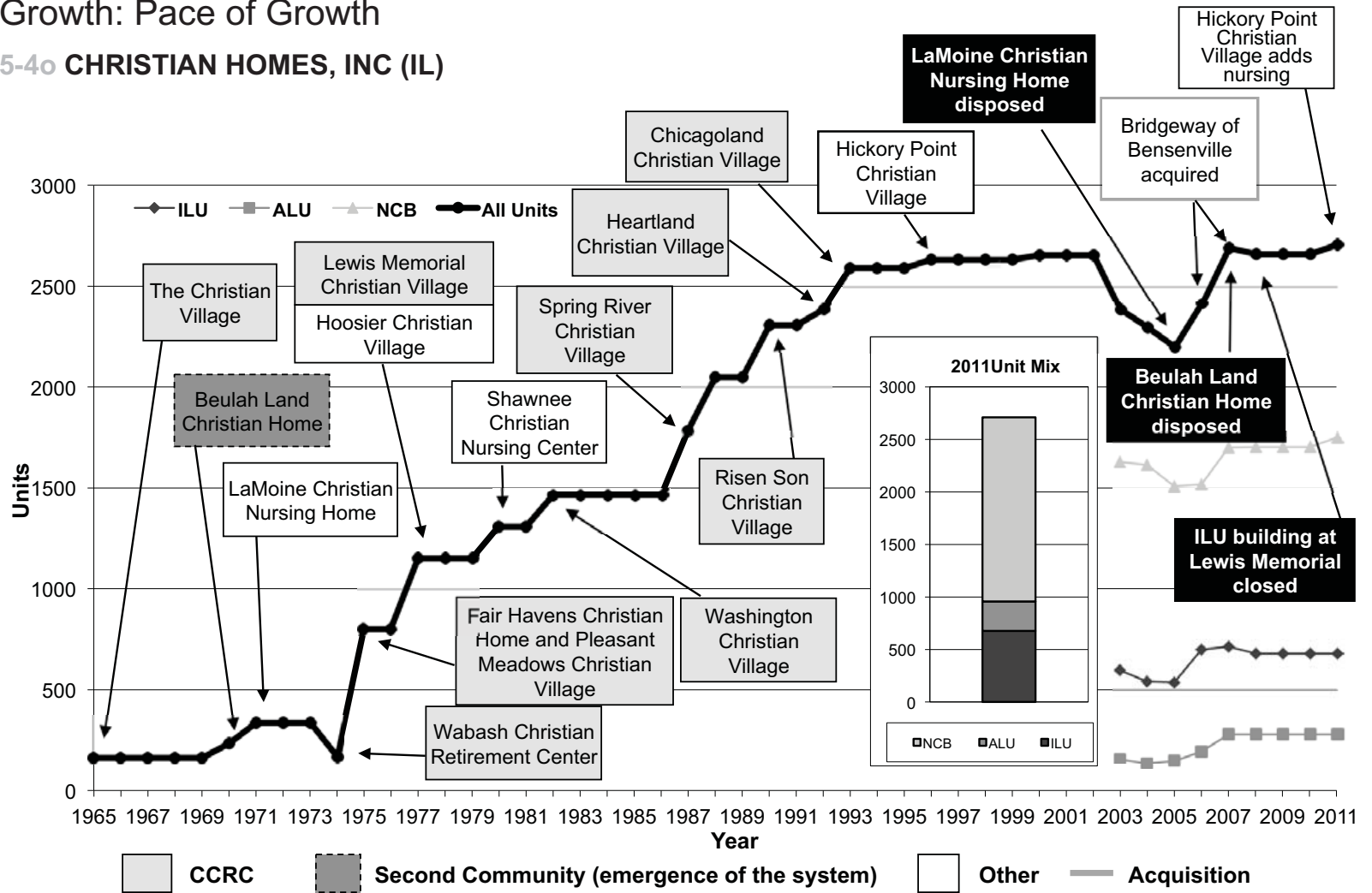
5-4n ASBURY COMMUNITIES (MD)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4o CHRISTIAN HOMES, INC (IL)

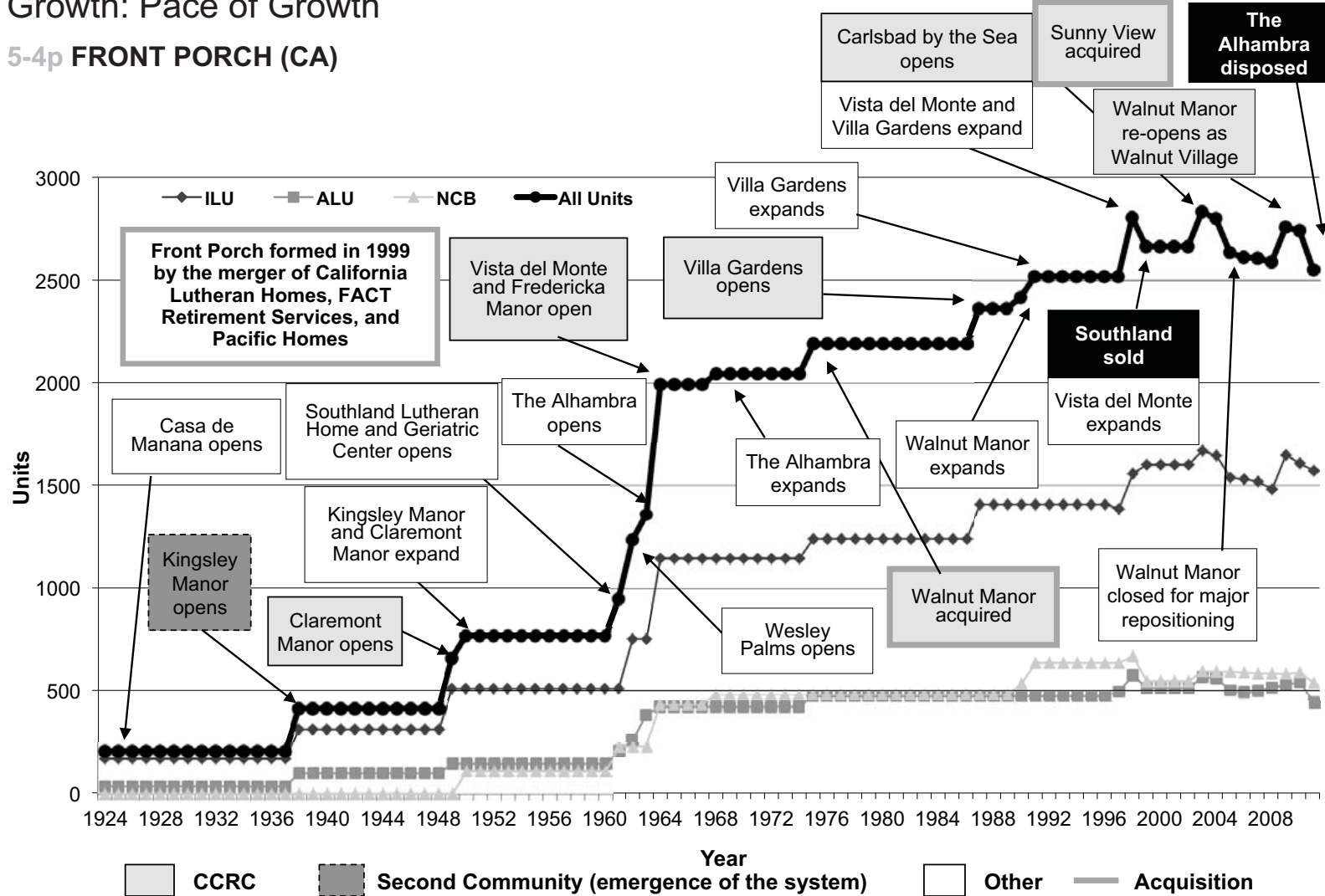


\* All text refers to opening dates. Unit mix shown as of 12/31/2003, due to lack of detail in early years.

## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

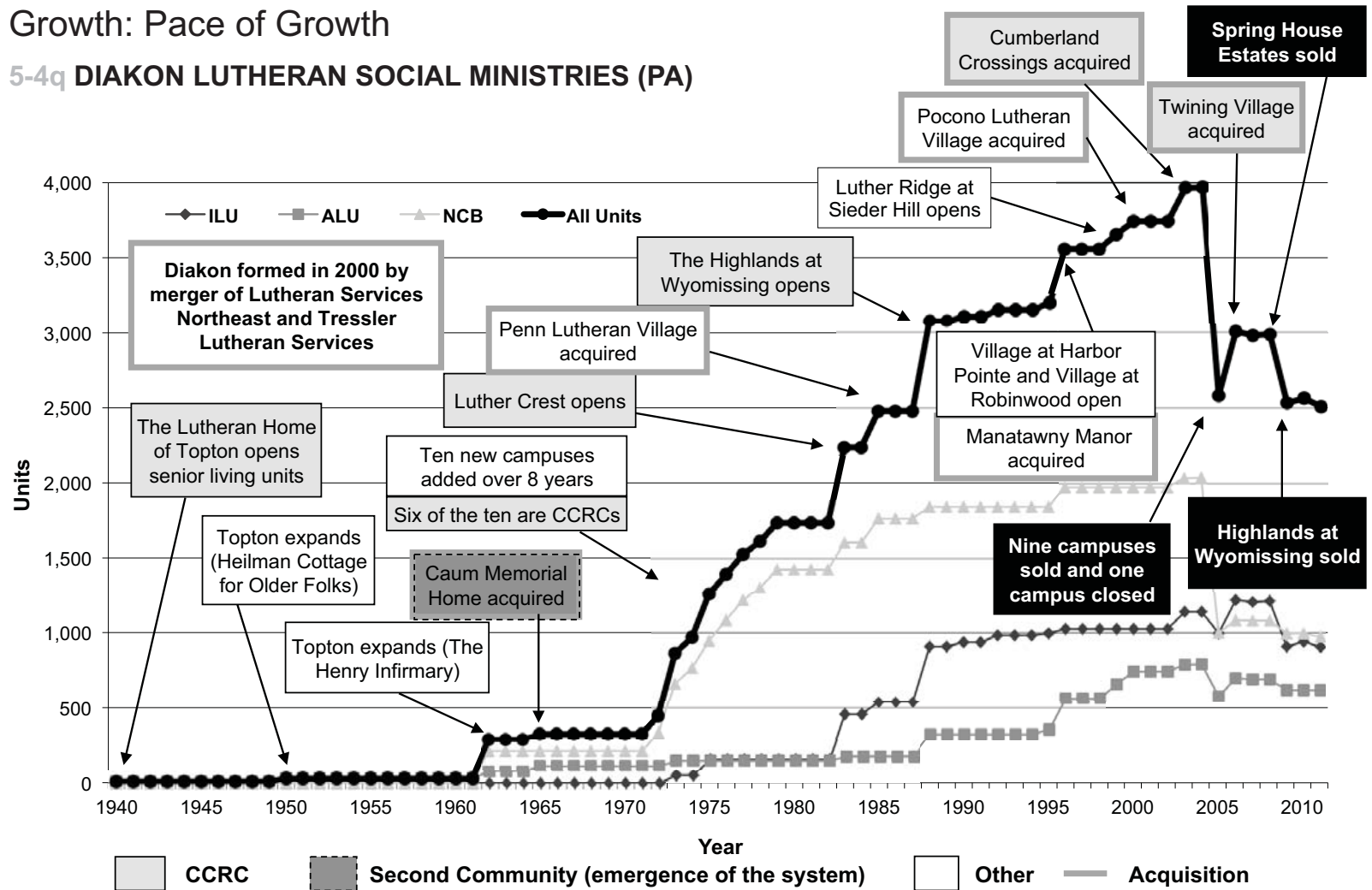
5-4p FRONT PORCH (CA)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4q DIAKON LUTHERAN SOCIAL MINISTRIES (PA)

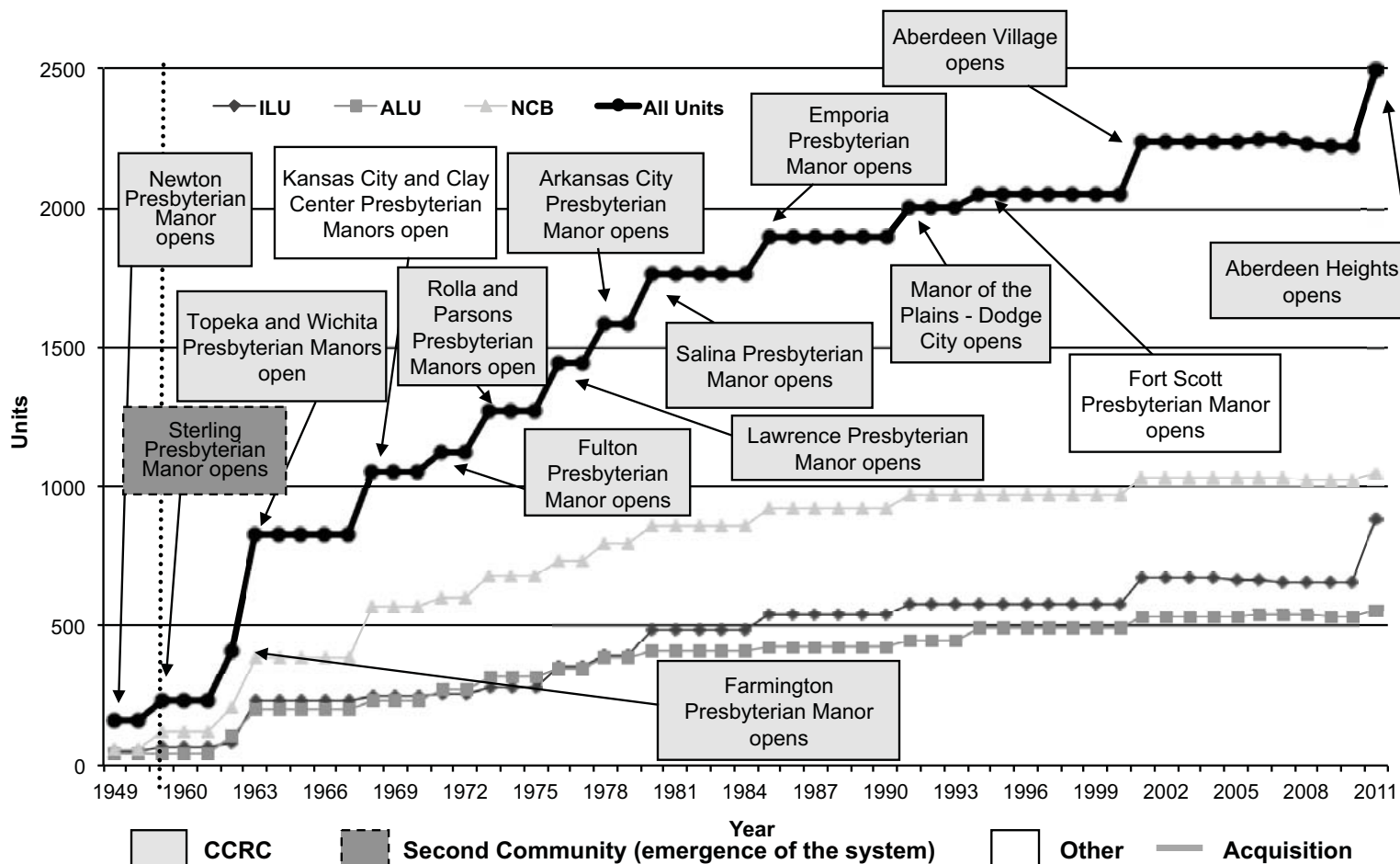




## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4r PRESBYTERIAN MANORS OF MID-AMERICA (KS)

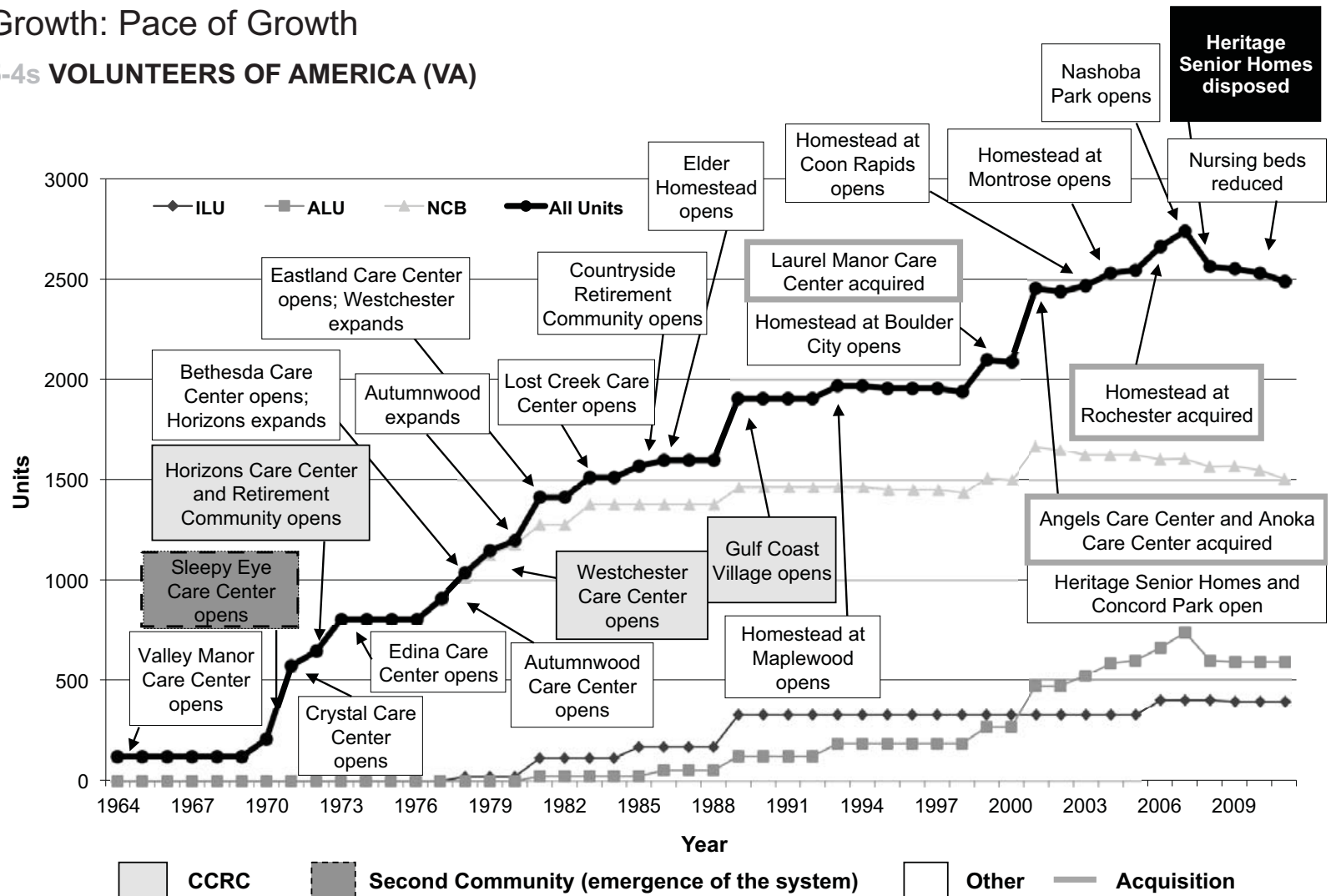




## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

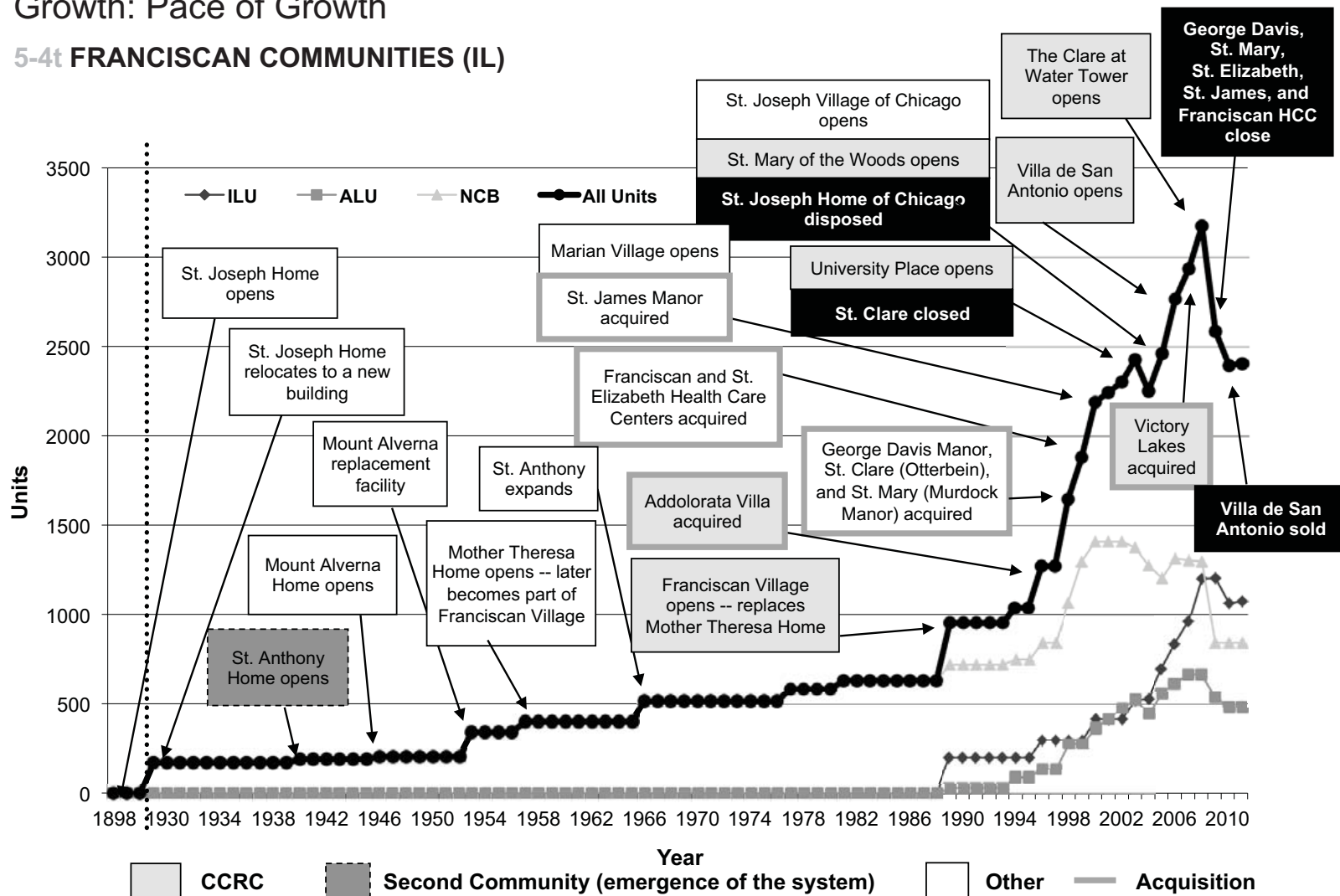
5-4s VOLUNTEERS OF AMERICA (VA)



## 5-4 2012 LeadingAge Ziegler 100

### Growth: Pace of Growth

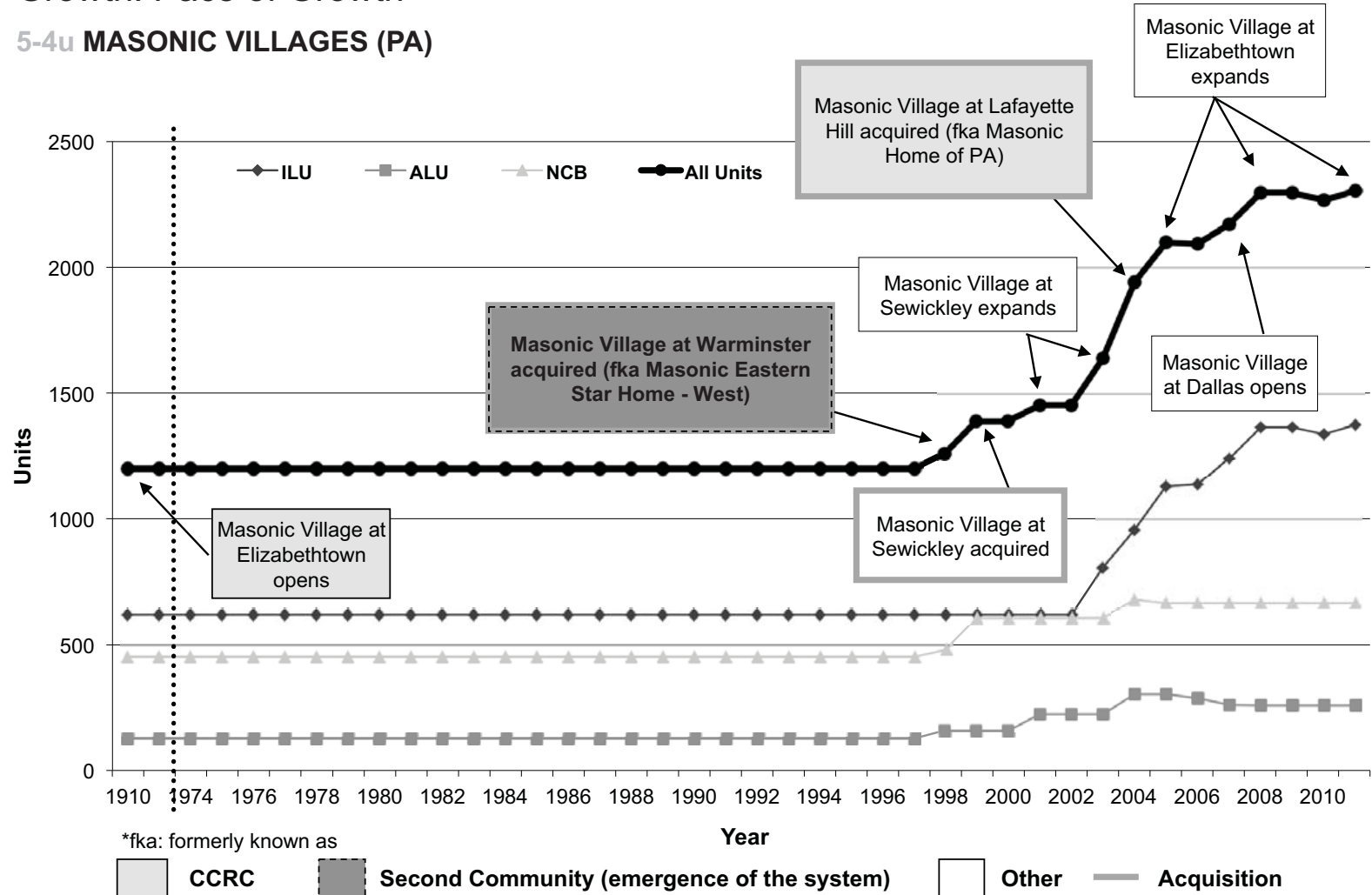
#### 5-4t FRANCISCAN COMMUNITIES (IL)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

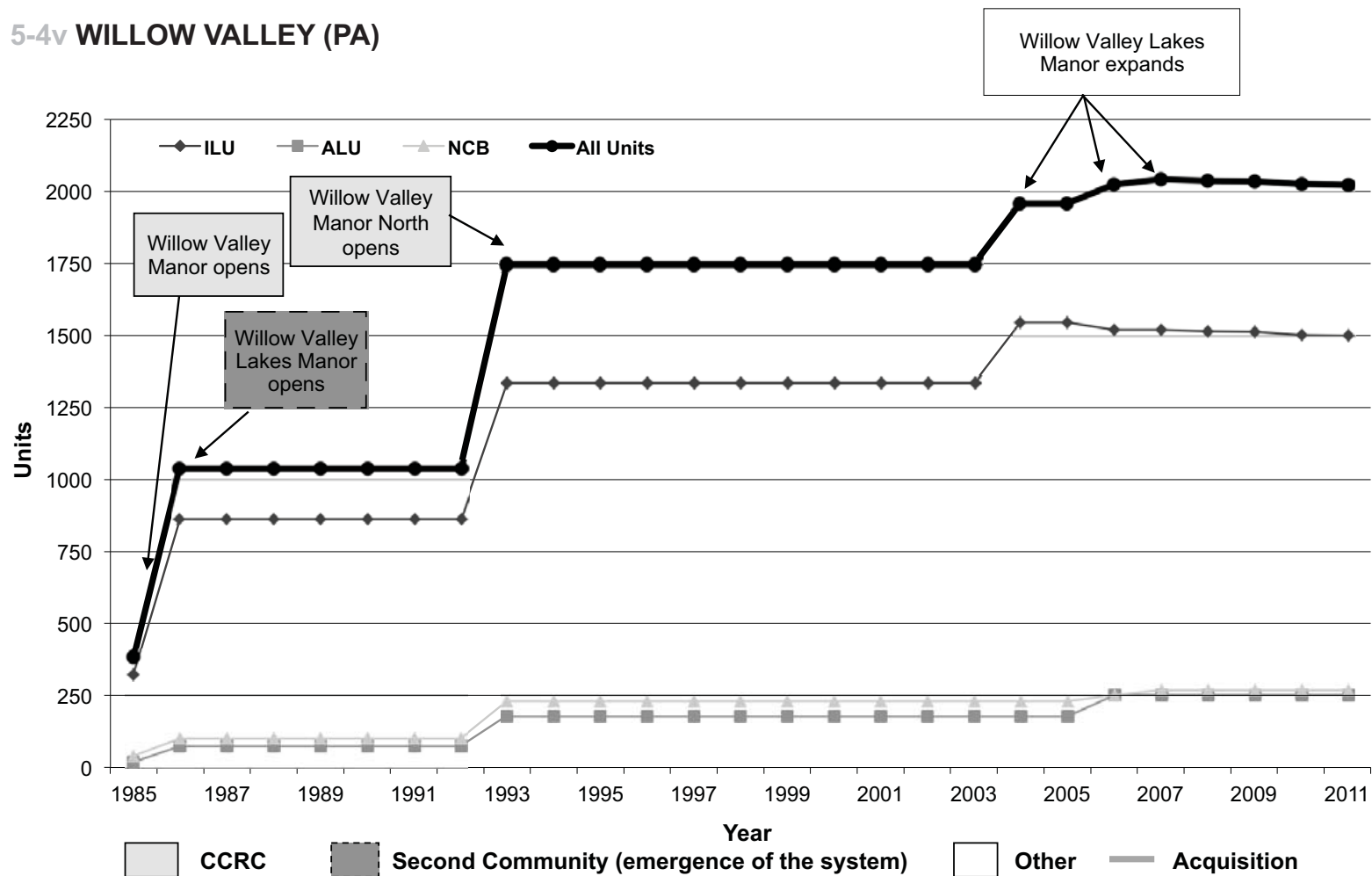
5-4u MASONIC VILLAGES (PA)



## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4v WILLOW VALLEY (PA)

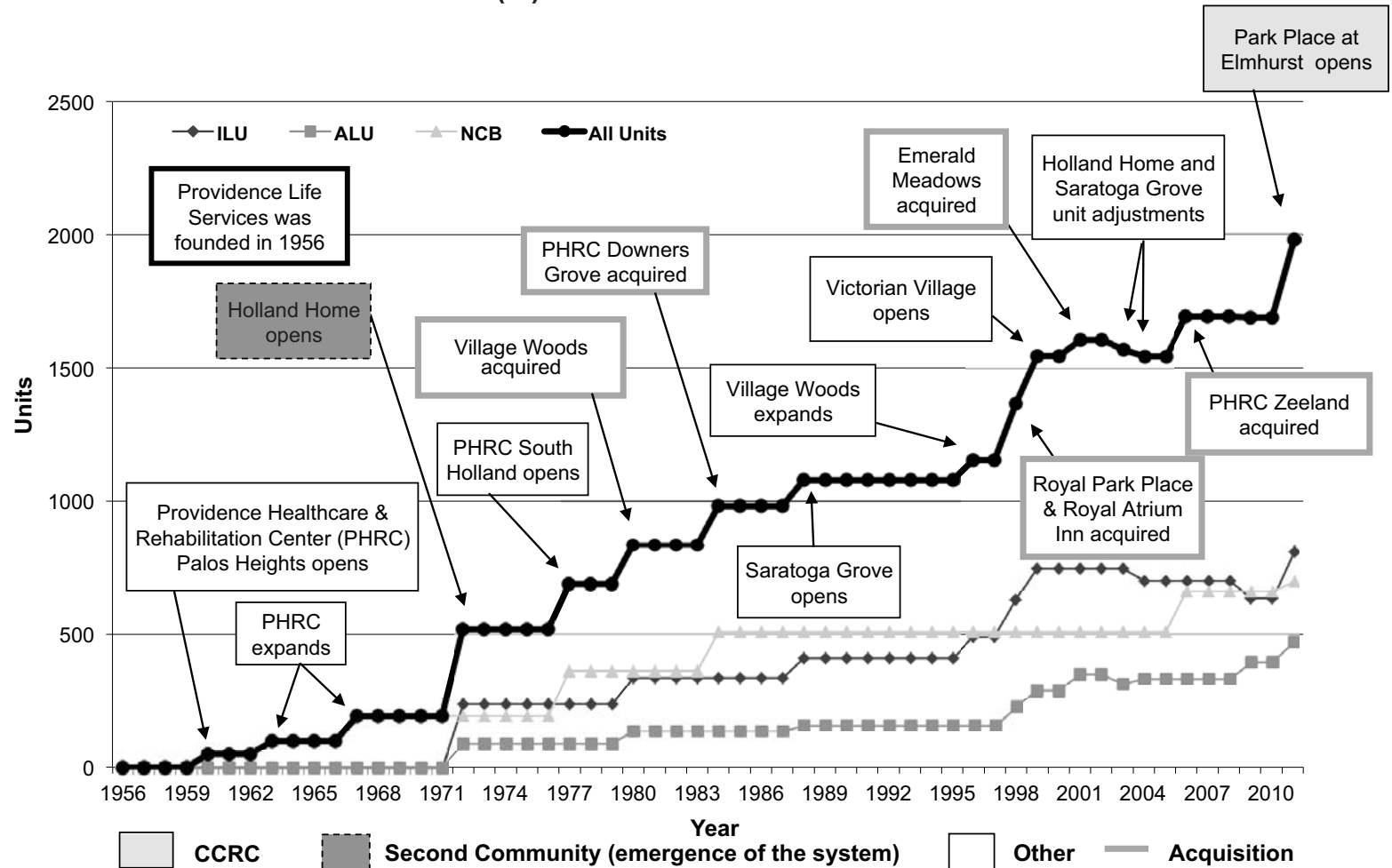


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100  
Ziegler

## 5-4 2012 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4w PROVIDENCE LIFE SERVICES (IL)



## 5-5 2012 LeadingAge Ziegler 100

### Growth: Emerging Systems

#### 5-5a OPENING OF FIRST COMMUNITY

System	State	1st Community Opened	2nd Community Opened	3rd Community Opened	Years to Multi-site status	Years from 2 to 3 sites
<b>Pre-1900, average years to multi-site status = 88</b>						
Simpson Senior Services	PA	1865	2000	2002	135	2
St. Ann's Community	NY	1873	2005	-	132	-
Concordia Lutheran Ministries	PA	1881	2003	2003	122	0
Covenant Retirement Communities	IL	1886	1962	1964	76	2
Holland Home	MI	1892	1975	1990	83	15
Lutheran Homes of South Carolina	SC	1892	1911	1997	19	86
Lutheran Life Communities	IL	1892	2000	2005	108	5
Lutheran Homes of Michigan	MI	1894	1969	1998	75	29
Masonicare	CT	1895	1972	1984	77	12
Augustana Care Corporation	MN	1896	1990	1998	94	8
Franciscan Communities	IL	1898	1940	1946	42	6
<b>1900s, average years to multi-site status = 45</b>						
Hebrew SeniorLife	MA	1903	1994	2002	91	8
Phoebe Ministries	PA	1903	1992	1992	89	0
Ecumen	MN	1904	1917	1930	13	13
Lutheran SeniorLife	PA	1904	1980	1986	76	6
Elder Care Alliance	CA	1906	1924	2001	18	77
Lutheran Senior Services	MO	1906	1929	1967	23	38
Front Porch	CA	1908	1912	1947	4	35
<b>1910s, average years to multi-site status = 67</b>						
Masonic Villages	PA	1910	1998	1999	88	1
United Methodist Memorial Home	IN	1910	2001	2009	91	8
Otterbein Senior Lifestyle Choices	OH	1912	1981	1987	69	6
Western Home Communities	IA	1912	u	u	-	-
Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1913	1965	1965	52	0
Presbyterian Homes	IL	1914	1985	1998	71	13
Living Branches	PA	1917	1945	1981	28	36

## 5-5 2012 LeadingAge Ziegler 100

### Growth: Emerging Systems

#### 5-5a OPENING OF FIRST COMMUNITY

System	State	1st Community Opened	2nd Community Opened	3rd Community Opened	Years to Multi-site status	Years from 2 to 3 sites
<b>1920s, average years to multi-site status = 32</b>						
United Church Homes	OH	1920	1964	1966	44	2
Sunnyside Communities	VA	1921	1929	1955	8	26
Ohio Presbyterian Retirement Services	OH	1922	1953	1956	31	3
Evangelical Lutheran Good Samaritan Society	SD	1923	1926	1935	3	9
Asbury Communities	MD	1926	1996	2000	70	4
Bethesda Health Group, Inc.	MO	1926	1989	1990	63	1
Elim Care	MN	1927	1968	1968	41	0
Springpoint Senior Living	NJ	1927	1952	1965	25	13
Presbyterian Senior Living	PA	1928	1934	1938	6	4
<b>1930s, average years to multi-site status = 34</b>						
Wesley Enhanced Living	PA	1930	1985	1995	55	10
American Baptist Homes of the Midwest	MN	1931	1958	1960	27	2
Homewood Retirement Centers	MD	1932	1953	1957	21	4
<b>1940s, average years to multi-site status = 17</b>						
Diakon Lutheran Social Ministries	PA	1940	1952	1961	12	9
Christian Care Centers	TX	1947	1973	1982	26	9
WesleyLife	IA	1947	1960	1962	13	2
Virginia United Methodist Homes, Inc.	VA	1948	1948	1960	0*	12
Oakwood Lutheran Senior Ministries	WI	1949	2000	-	51	-
Presbyterian Manors of Mid-America	KS	1949	1959	1962	10	3
Presbyterian SeniorCare	PA	1949	1960	1992	11	32
United Methodist Homes of New Jersey	NJ	1949	1961	1963	12	2

## 5-5 2012 LeadingAge Ziegler 100

### Growth: Emerging Systems

#### 5-5a OPENING OF FIRST COMMUNITY

System	State	1st Community Opened	2nd Community Opened	3rd Community Opened	Years to Multi-site status	Years from 2 to 3 sites
<b>1950s, average years to multi-site status = 18</b>						
Cornerstone Affiliates	CA	1950	1966	1966	16	0
Virginia Baptist Homes	VA	1951	1969	1978	18	9
Mather LifeWays	IL	1952	1989	1990	37	1
Presbyterian Villages of Michigan	MI	1952	1978	1989	26	11
The Presbyterian Homes, Inc. of North Carolina	NC	1952	1988	1993	36	5
Luthercare	PA	1953	1966	1991	13	25
Buckner Retirement Services, Inc.	TX	1954	1955	1970	1	15
Presby's Inspired Life	PA	1955	1964	1975	9	11
Presbyterian Homes and Services	MN	1955	1986	1986	31	0
be.group	CA	1956	1959	1961	3	2
VMP	WI	1956	2000	2004	44	4
Cedar Community	WI	1957	1986	2000	29	14
Baptist Village Retirement Communities of Oklahoma	OK	1958	1965	1977	7	12
Presbyterian Communities of South Carolina	SC	1958	1975	1976	17	1
Shell Point	FL	1958	1968	-	10	-
Lutheran Social Services of South Central Pennsylvania	PA	1959	1970	1979	11	9
United Methodist Homes	NY	1959	1961	1963	2	2
<b>1960s, average years to multi-site status = 14</b>						
Providence Life Services	IL	1960	1972	1977	12	5
Morningside Ministries	TX	1961	1977	2004	16	27
National Church Residences	OH	1961	u	u	-	-
Northern California Presbyterian Homes and Services	CA	1961	1969	1969	8	0
Pacific Retirement Services, Inc.	OR	1961	1995	1996	34	1
Westminster Communities of Florida	FL	1961	1965	1971	4	6
Lutheran Services for the Aging	NC	1962	1971	1976	9	5
Methodist Retirement Communities and Affiliates	TX	1962	1964	1966	2	2
Presbyterian Communities and Services	TX	1962	1980	-	18	-
Menno Haven	PA	1964	1991	2003	27	12
Volunteers of America	VA	1964	1970	1971	6	1
Christian Homes, Inc.	IL	1965	1970	1971	5	1
Episcopal Senior Communities	CA	1965	1966	1971	1	5
Retirement Housing Foundation	CA	1965	1970	1970	5	0
Mississippi Methodist Senior Services	MS	1966	1966	1978	0*	12
Sears Methodist Retirement System, Inc.	TX	1966	1992	1993	26	1
Goodwin House Incorporated	VA	1967	1987	-	20	-
Greencroft	IN	1967	2004	2006	37	2



## 5-5 2012 LeadingAge Ziegler 100

### Growth: Emerging Systems

#### 5-5a OPENING OF FIRST COMMUNITY

System	State	1st Community Opened	2nd Community Opened	3rd Community Opened	Years to Multi- site status	Years from 2 to 3 sites
<b>1970s, average years to multi-site status = 9</b>						
Air Force Villages	TX	1970	1987	1998	17	11
Loretto (Catholic Charities, Diocese of Syracuse)	NY	1971	1993	1999	22	6
United Church Homes & Services	NC	1971	1986	2000	15	14
ACTS Retirement-Life Communities, Inc.	PA	1972	1976	1977	4	1
Christian Care Communities	KY	1972	1979	1980	7	1
Eskaton	CA	1973	1974	1977	1	3
The Kendal Corporation	PA	1973	1977	1981	4	4
United Methodist Retirement Homes, Inc.	NC	1977	1987	1999	10	12
Lifespace Communities, Inc.	IA	1978	1979	1982	1	3
<b>1980s, average years to multi-site status = 10</b>						
EMA, Inc.	MD	1980	1994	1999	14	5
Christian Care Companies	AZ	1981	1996	1998	15	2
Walker Methodist	MN	1982	1988	1990	6	2
Elant	NY	1985	1996	1998	11	2
The Eddy	NY	1985	1985	1989	0*	4
Willow Valley Retirement Communities	PA	1985	1986	1993	1	7
SantaFe Senior Living	FL	1986	2006	2008	20	2
<b>1990s, average years to multi-site status = 6</b>						
Bethesda Senior Living Communities	CO	1990	1993	1995	3	2
National Senior Campuses	MD	1995	1998	1998	3	0
Garden Spot Village	PA	1996	2009	-	13	-
<b>2000s, average years to multi-site status = 4</b>						
Senior Quality Lifestyles Corporation	TX	2001	2005	2007	4	2

u = unknown

\* When an organization begins by opening two communities in the same year the "Years to Multi-site status" is zero.

## 5-5 2012 LeadingAge Ziegler 100

### Growth: Emerging Systems

#### 5-5b OPENING OF SECOND COMMUNITY

System	State	1st Community Open	2nd Community Open	3rd Community Open	Years to Multi-site status	Years from 2 to 3 sites
<b>1910s</b>						
Lutheran Homes of South Carolina	SC	1892	1911	1997	19	86
Front Porch	CA	1908	1912	1947	4	35
Ecumen	MN	1904	1917	1930	13	13
<b>1920s</b>						
Elder Care Alliance	CA	1906	1924	2001	18	77
Evangelical Lutheran Good Samaritan Society	SD	1923	1926	1935	3	9
Lutheran Senior Services	MO	1906	1929	1967	23	38
Sunnyside Communities	VA	1921	1929	1955	8	26
<b>1930s</b>						
Presbyterian Senior Living	PA	1928	1934	1938	6	4
<b>1940s</b>						
Franciscan Communities	IL	1898	1940	1946	42	6
Living Branches	PA	1917	1945	1981	28	36
Virginia United Methodist Homes, Inc.	VA	1948	1948	1960	0*	12
<b>1950s</b>						
Diakon Lutheran Social Ministries	PA	1940	1952	1961	12	9
Springpoint Senior Living	NJ	1927	1952	1965	25	13
Homewood Retirement Centers	MD	1932	1953	1957	21	4
Ohio Presbyterian Retirement Services	OH	1922	1953	1956	31	3
Buckner Retirement Services, Inc.	TX	1954	1955	1970	1	15
American Baptist Homes of the Midwest	MN	1931	1958	1960	27	2
be.group	CA	1956	1959	1961	3	2
Presbyterian Manors of Mid-America	KS	1949	1959	1962	10	3

## 5-5 2012 LeadingAge Ziegler 100

### Growth: Emerging Systems

#### 5-5b OPENING OF SECOND COMMUNITY

System	State	1st Community Open	2nd Community Open	3rd Community Open	Years to Multi-site status	Years from 2 to 3 sites
<b>1960s</b>						
Presbyterian SeniorCare	PA	1949	1960	1992	11	32
WesleyLife	IA	1947	1960	1962	13	2
United Methodist Homes	NY	1959	1961	1963	2	2
United Methodist Homes of New Jersey	NJ	1949	1961	1963	12	2
Covenant Retirement Communities	IL	1886	1962	1964	76	2
Methodist Retirement Communities and Affiliates	TX	1962	1964	1966	2	2
Presby's Inspired Life	PA	1955	1964	1975	9	11
United Church Homes	OH	1920	1964	1966	44	2
Baptist Village Retirement Communities of Oklahoma	OK	1958	1965	1977	7	12
Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1913	1965	1965	52	0
Westminster Communities of Florida	FL	1961	1965	1971	4	6
Cornerstone Affiliates	CA	1950	1966	1966	16	0
Episcopal Senior Communities	CA	1965	1966	1971	1	5
Luthercare	PA	1953	1966	1991	13	25
Mississippi Methodist Senior Services	MS	1966	1966	1978	0*	12
Elim Care	MN	1927	1968	1968	41	0
Shell Point	FL	1958	1968	-	10	-
Lutheran Homes of Michigan	MI	1894	1969	1998	75	29
Northern California Presbyterian Homes and Services	CA	1961	1969	1969	8	0
Virginia Baptist Homes	VA	1951	1969	1978	18	9
<b>1970s</b>						
Christian Homes, Inc.	IL	1965	1970	1971	5	1
Lutheran Social Services of South Central Pennsylvania	PA	1959	1970	1979	11	9
Retirement Housing Foundation	CA	1965	1970	1970	5	0
Volunteers of America	VA	1964	1970	1971	6	1
Lutheran Services for the Aging	NC	1962	1971	1976	9	5
Masonicare	CT	1895	1972	1984	77	12
Providence Life Services	IL	1960	1972	1977	12	5
Christian Care Centers	TX	1947	1973	1982	26	9
Eskaton	CA	1973	1974	1977	1	3
Holland Home	MI	1892	1975	1990	83	15
Presbyterian Communities of South Carolina	SC	1958	1975	1976	17	1
ACTS Retirement-Life Communities, Inc.	PA	1972	1976	1977	4	1
Morningside Ministries	TX	1961	1977	2004	16	27
The Kendal Corporation	PA	1973	1977	1981	4	4
Presbyterian Villages of Michigan	MI	1952	1978	1989	26	11
Christian Care Communities	KY	1972	1979	1980	7	1
Lifespace Communities, Inc.	IA	1978	1979	1982	1	3

## 5-5 2012 LeadingAge Ziegler 100

### Growth: Emerging Systems

#### 5-5b OPENING OF SECOND COMMUNITY

System	State	1st Community Open	2nd Community Open	3rd Community Open	Years to Multi- site status	Years from 2 to 3 sites
<b>1980s</b>						
Lutheran SeniorLife	PA	1904	1980	1986	76	6
Presbyterian Communities and Services	TX	1962	1980	-	18	-
Otterbein Senior Lifestyle Choices	OH	1912	1981	1987	69	6
Presbyterian Homes	IL	1914	1985	1998	71	13
The Eddy	NY	1985	1985	1989	0*	4
Wesley Enhanced Living	PA	1930	1985	1995	55	10
Cedar Community	WI	1957	1986	2000	29	14
Presbyterian Homes and Services	MN	1955	1986	1986	31	0
United Church Homes & Services	NC	1971	1986	2000	15	14
Willow Valley Retirement Communities	PA	1985	1986	1993	1	7
Air Force Villages	TX	1970	1987	1998	17	11
Goodwin House Incorporated	VA	1967	1987	-	20	-
United Methodist Retirement Homes, Inc.	NC	1977	1987	1999	10	12
The Presbyterian Homes, Inc. of North Carolina	NC	1952	1988	1993	36	5
Walker Methodist	MN	1982	1988	1990	6	2
Bethesda Health Group, Inc.	MO	1926	1989	1990	63	1
Mather LifeWays	IL	1952	1989	1990	37	1
<b>1990s</b>						
Augustana Care Corporation	MN	1896	1990	1998	94	8
Menno Haven	PA	1964	1991	2003	27	12
Phoebe Ministries	PA	1903	1992	1992	89	0
Sears Methodist Retirement System, Inc.	TX	1966	1992	1993	26	1
Bethesda Senior Living Communities	CO	1990	1993	1995	3	2
Loretto (Catholic Charities, Diocese of Syracuse)	NY	1971	1993	1999	22	6
EMA, Inc.	MD	1980	1994	1999	14	5
Hebrew SeniorLife	MA	1903	1994	2002	91	8
Pacific Retirement Services, Inc.	OR	1961	1995	1996	34	1
Asbury Communities	MD	1926	1996	2000	70	4
Christian Care Companies	AZ	1981	1996	1998	15	2
Elant	NY	1985	1996	1998	11	2
Masonic Villages	PA	1910	1998	1999	88	1
National Senior Campuses	MD	1995	1998	1998	3	0

## 5-5 2012 LeadingAge Ziegler 100

### Growth: Emerging Systems

#### 5-5b OPENING OF SECOND COMMUNITY

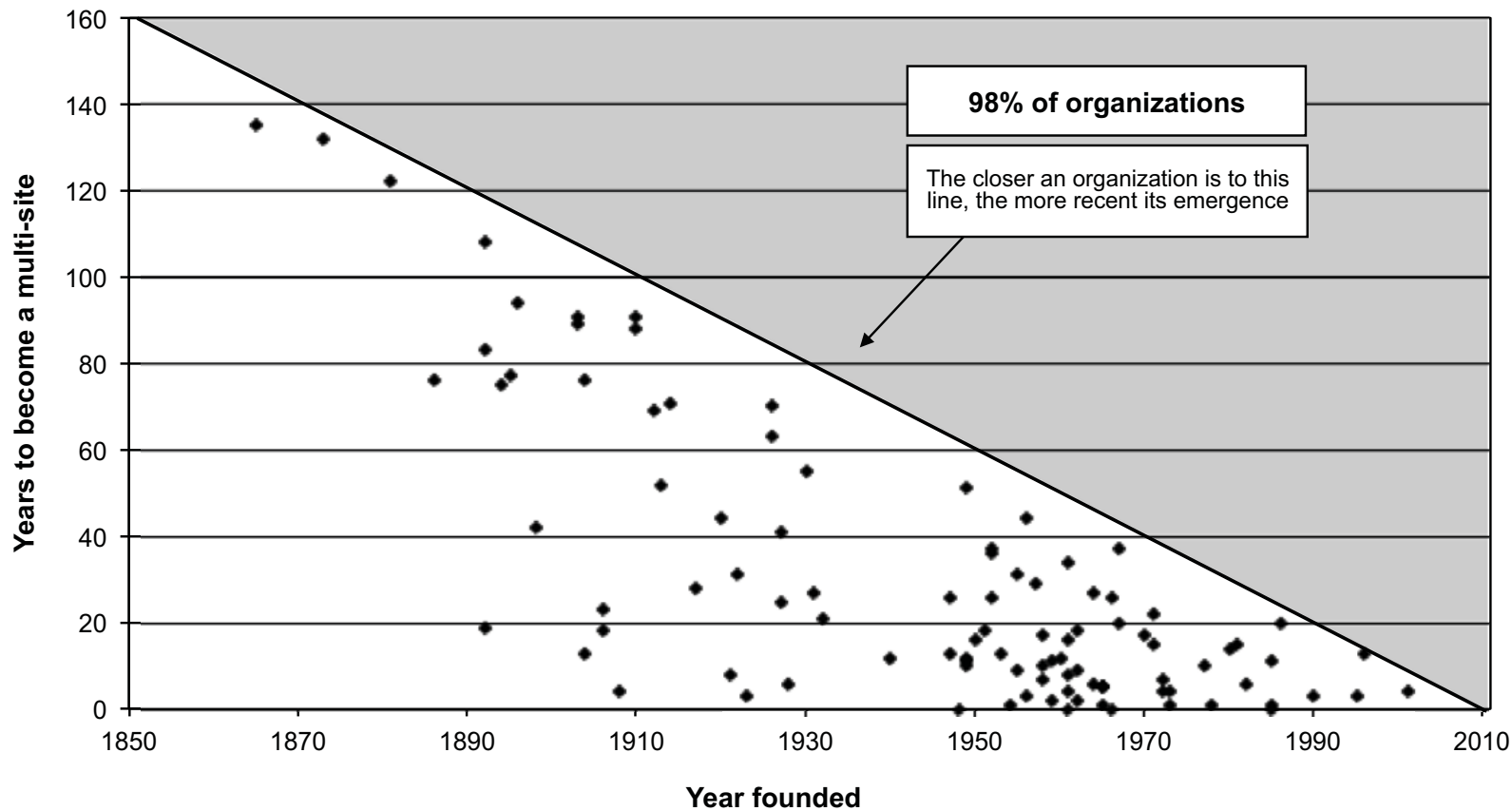
System	State	1st Community Open	2nd Community Open	3rd Community Open	Years to Multi-site status	Years from 2 to 3 sites
<b>2000s</b>						
Lutheran Life Communities	IL	1892	2000	2005	108	5
Oakwood Lutheran Senior Ministries	WI	1949	2000	-	51	-
Simpson Senior Services	PA	1865	2000	2002	135	2
VMP	WI	1956	2000	2004	44	4
United Methodist Memorial Home	IN	1910	2001	2009	91	8
Concordia Lutheran Ministries	PA	1881	2003	2003	122	0
Greencroft	IN	1967	2004	2006	37	2
Senior Quality Lifestyles Corporation	TX	2001	2005	2007	4	2
St. Ann's Community	NY	1873	2005	-	132	-
SantaFe Senior Living	FL	1986	2006	2008	20	2
Garden Spot Village	PA	1996	2009	-	13	-

\* When an organization begins by opening two communities in the same year the "Years to Multi-site status" is zero.

## 5-5 2012 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5c EMERGENCE OF ALL LZ 100s

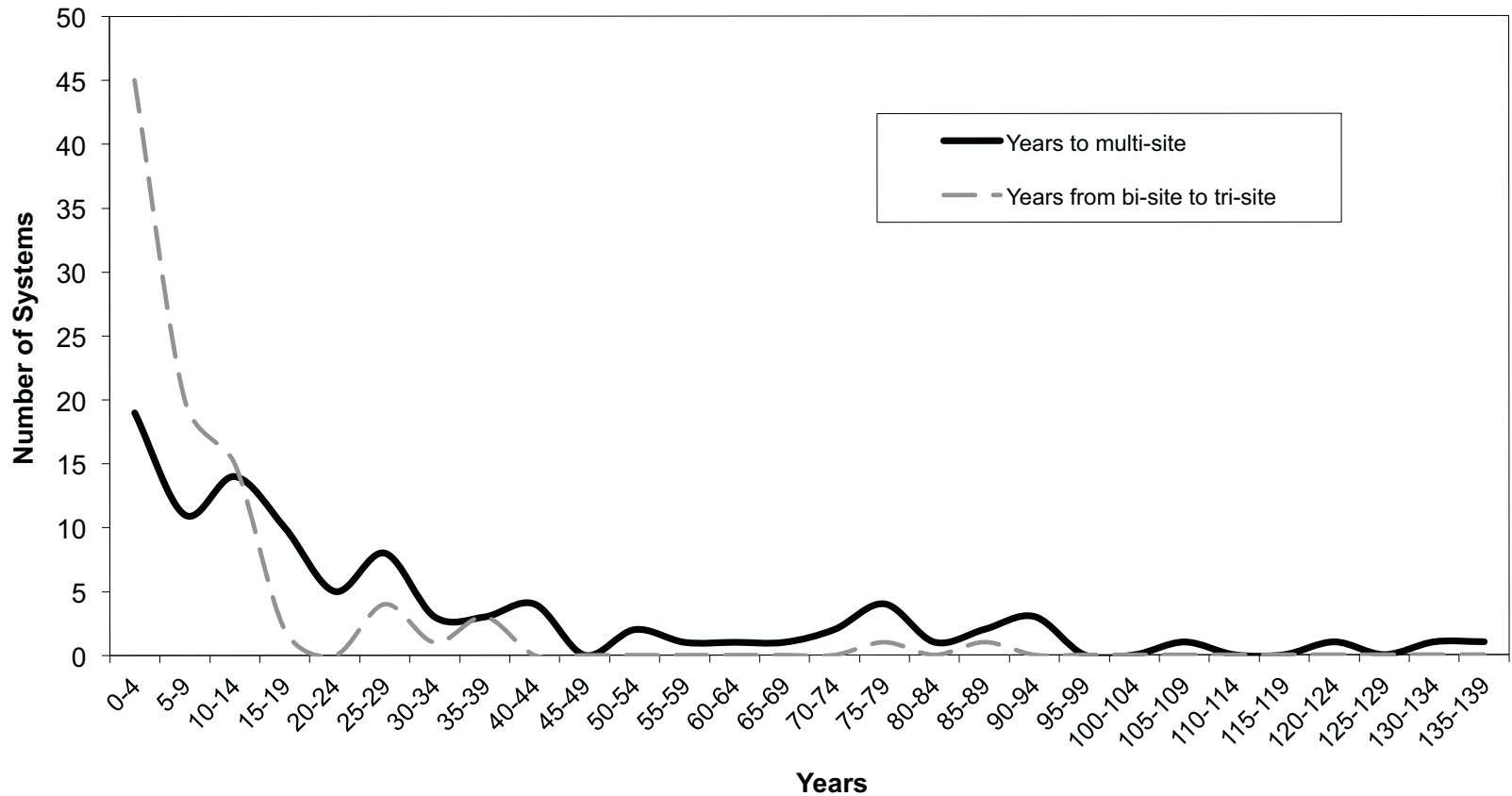


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## 5-5 2012 LeadingAge Ziegler 100

Growth: Emerging Systems

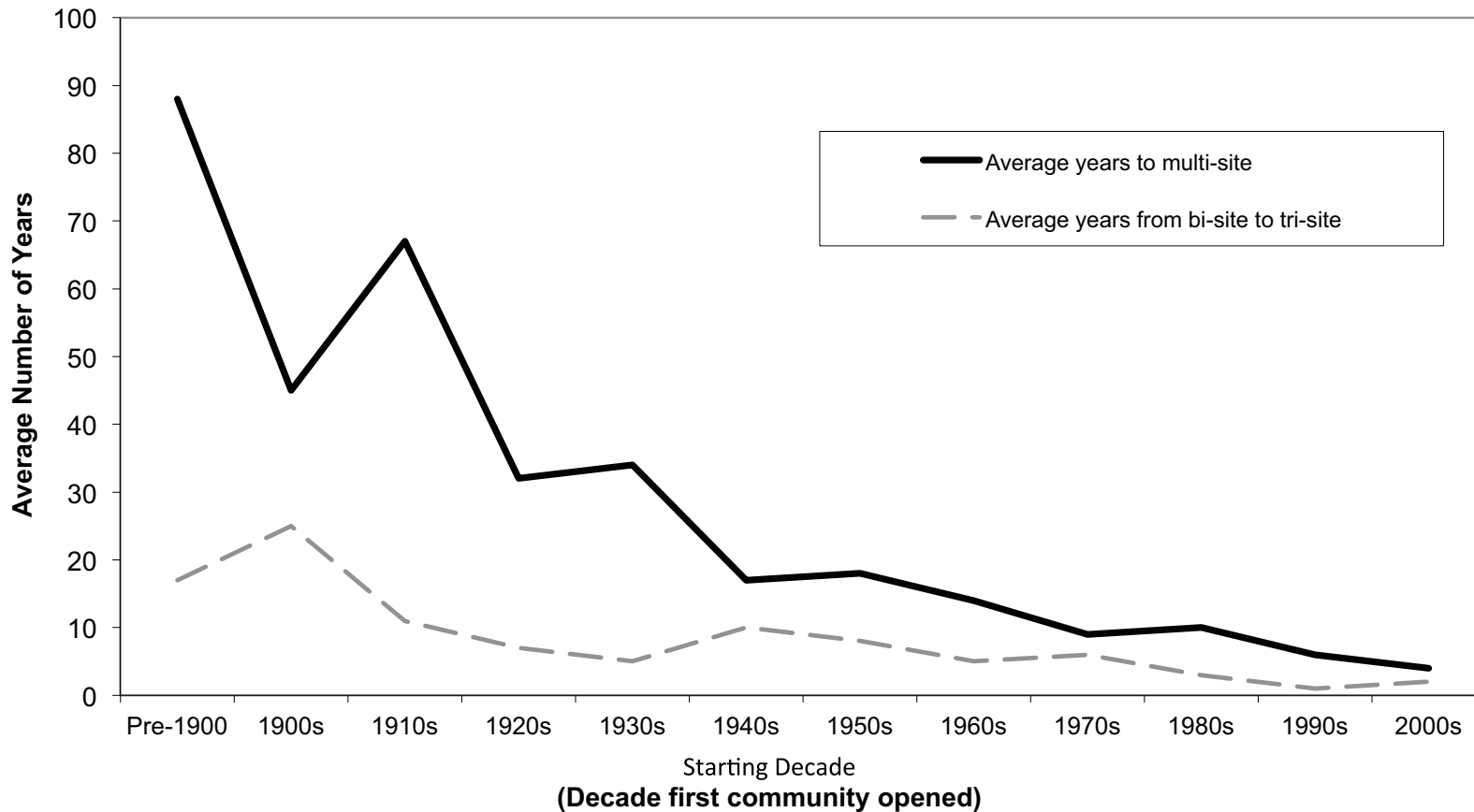
5-5d YEARS BETWEEN NEW COMMUNITIES, BY NUMBER OF SYSTEMS



## 5-5 2012 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5e AVERAGE YEARS BETWEEN NEW COMMUNITIES, BY DECADE





## 5-6 2012 LeadingAge Ziegler 100

### Growth: Rapid Changers

#### 5-6a ORGANIZATIONS BY AGGREGATE GROWTH, BY PERIOD

2012 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/11)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2011 (n=100)						
36	Senior Quality Lifestyles Corporation	TX	49.29%	49.29%	524	1,587
10	The Kendal Corporation	PA	18.23%	18.23%	483	3,132
97	Christian Care Communities	KY	17.97%	17.97%	122	801
25	Providence Life Services	IL	16.89%	16.89%	286	1,979
7	Lifespace Communities, Inc.	IA	12.72%	12.72%	463	4,102
20	Presbyterian Manors of Mid-America	KS	12.25%	12.25%	272	2,493
86	Mather LifeWays	IL	12.23%	12.23%	98	899
46	Concordia Lutheran Ministries	PA	11.55%	11.55%	145	1,400
17	Ecumen	MN	9.85%	9.85%	234	2,609
51	Lutheran Services for the Aging	NC	8.55%	8.55%	100	1,270
Growth from 2000 to 2011 (n=100)						
36	Senior Quality Lifestyles Corporation**	TX	n/a**	n/a**	1,587	1,587
2	National Senior Campuses	MD	555.37%	16.96%	14,573	17,197
49	SantaFe Senior Living	FL	332.54%	12.98%	981	1,276
33	Loretto (Catholic Charities, Diocese of Syracuse)	NY	323.54%	12.78%	1,223	1,601
17	Ecumen	MN	294.11%	12.11%	1,947	2,609
94	Garden Spot Village <sup>s</sup>	PA	259.65%	11.26%	592	820
38	National Church Residences	OH	249.66%	11.00%	1,101	1,542
9	Lutheran Senior Services	MO	202.17%	9.65%	2,143	3,203
28	Christian Care Companies	AZ	197.34%	9.51%	1,186	1,787
79	United Church Homes & Services	NC	163.03%	8.39%	582	939
Growth from 1990 to 2011 (n=100)						
2	National Senior Campuses**	MD	n/a**	n/a**	17,197	17,197
36	Senior Quality Lifestyles Corporation**	TX	n/a**	n/a**	1,587	1,587
55	Bethesda Senior Living Communities**	CO	n/a**	n/a**	1,221	1,221
94	Garden Spot Village**	PA	n/a**	n/a**	820	820
33	Loretto (Catholic Charities, Diocese of Syracuse)	NY	830.81%	10.67%	1,429	1,601
74	Elant <sup>s</sup>	NY	732.50%	10.11%	879	999
4	Presbyterian Homes and Services	MN	678.16%	9.77%	5,527	6,342
69	Lutheran Homes of South Carolina	SC	674.63%	9.75%	904	1,038
86	Mather LifeWays	IL	533.10%	8.75%	757	899
13	Pacific Retirement Services, Inc. <sup>s</sup>	OR	529.76%	8.72%	2,421	2,878

\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2011 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,573/(17,197-14,573). Average Annual Growth was calculated by finding the geometric mean over the period (1, 12, or 22 years).

\*\* The system was founded after the beginning of the time period so they had zero units at the start of the period. Aggregate and Annual Growth rates can not be calculated in this case.

<sup>s</sup> At the beginning of the base year of the period, these organizations were single-site organizations.

## 5-6 2012 LeadingAge Ziegler 100

### Growth: Rapid Changers

#### 5-6b ORGANIZATIONS BY GROWTH IN UNITS, BY PERIOD

2012 Rank	System Name	State	Growth*		Total Units (as of 12/31/11)
			Units Added	Aggregate Growth (%)	
Growth in 2011 (n=100)					
36	Senior Quality Lifestyles Corporation	TX	524	49.29%	1,587
10	The Kendal Corporation	PA	483	18.23%	3,132
7	Lifespace Communities, Inc.	IA	463	12.72%	4,102
25	Providence Life Services	IL	286	16.89%	1,979
20	Presbyterian Manors of Mid-America	KS	272	12.25%	2,493
4	Presbyterian Homes and Services	MN	246	4.04%	6,342
17	Ecumen	MN	234	9.85%	2,609
6	Retirement Housing Foundation	CA	166	4.03%	4,289
46	Concordia Lutheran Ministries	PA	145	11.55%	1,400
97	Christian Care Communities	KY	122	17.97%	801
Growth from 2000 to 2011 (n=100)					
2	National Senior Campuses	MD	14,573	555.37%	17,197
1	Evangelical Lutheran Good Samaritan Society	SD	8,127	75.20%	18,934
4	Presbyterian Homes and Services	MN	3,661	136.55%	6,342
3	ACTS Retirement-Life Communities, Inc.	PA	2,381	41.42%	8,130
9	Lutheran Senior Services	MO	2,143	202.17%	3,203
17	Ecumen	MN	1,947	294.11%	2,609
36	Senior Quality Lifestyles Corporation**	TX	1,587	n/a**	1,587
13	Pacific Retirement Services, Inc.	OR	1,581	121.90%	2,878
10	The Kendal Corporation	PA	1,389	79.69%	3,132
33	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,223	323.54%	1,601
Growth from 1990 to 2011 (n=100)					
2	National Senior Campuses**	MD	17,197	n/a**	17,197
1	Evangelical Lutheran Good Samaritan Society	SD	9,149	93.50%	18,934
4	Presbyterian Homes and Services	MN	5,527	678.16%	6,342
3	ACTS Retirement-Life Communities, Inc.	PA	3,199	64.88%	8,130
9	Lutheran Senior Services	MO	2,512	363.53%	3,203
13	Pacific Retirement Services, Inc. <sup>s</sup>	OR	2,421	529.76%	2,878
10	The Kendal Corporation	PA	2,379	315.94%	3,132
8	Westminster Communities of Florida	FL	2,025	171.03%	3,209
17	Ecumen	MN	1,947	294.11%	2,609
15	Asbury Communities <sup>s</sup>	MD	1,881	214.97%	2,756

\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2011 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,573/(17,197-14,573). Average Annual Growth was calculated by finding the geometric mean over the period (1, 12, or 22 years).

\*\* The system was founded after the beginning of the time period so they had zero units at the start of the period. Aggregate and Annual Growth rates can not be calculated in this case.

<sup>s</sup> At the beginning of the base year of the period, these organizations were single-site organizations.

## 5-6 2012 LeadingAge Ziegler 100

### Growth: Rapid Changers

#### 5-6c ORGANIZATIONS BY AGGREGATE GROWTH FOR THE LARGEST SYSTEMS (OVER 2000 UNITS)

2012 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/11)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2011 (n=100)						
10	The Kendal Corporation	PA	18.23%	18.23%	483	3,132
7	Lifespace Communities, Inc.	IA	12.72%	12.72%	463	4,102
20	Presbyterian Manors of Mid-America	KS	12.25%	12.25%	272	2,493
17	Ecumen	MN	9.85%	9.85%	234	2,609
4	Presbyterian Homes and Services	MN	4.04%	4.04%	246	6,342
6	Retirement Housing Foundation	CA	4.03%	4.03%	166	4,289
9	Lutheran Senior Services	MO	3.32%	3.32%	103	3,203
16	Christian Homes, Inc.	IL	1.77%	1.77%	47	2,707
23	Masonic Villages	PA	1.68%	1.68%	38	2,306
15	Asbury Communities	MD	0.84%	0.84%	23	2,756
Growth from 2000 to 2011 (n=100)						
2	National Senior Campuses	MD	555.37%	16.96%	14,573	17,197
17	Ecumen	MN	294.11%	12.11%	1,947	2,609
9	Lutheran Senior Services	MO	202.17%	9.65%	2,143	3,203
4	Presbyterian Homes and Services	MN	136.55%	7.44%	3,661	6,342
13	Pacific Retirement Services, Inc.	OR	121.90%	6.87%	1,581	2,878
10	The Kendal Corporation	PA	79.69%	5.01%	1,389	3,132
1	Evangelical Lutheran Good Samaritan Society	SD	75.20%	4.78%	8,127	18,934
15	Asbury Communities	MD	68.25%	4.43%	1,118	2,756
23	Masonic Villages	PA	65.78%	4.30%	915	2,306
8	Westminster Communities of Florida	FL	50.87%	3.49%	1,082	3,209
Growth from 1990 to 2011 (n=100)						
2	National Senior Campuses**	MD	n/a**	n/a**	17,197	17,197
4	Presbyterian Homes and Services	MN	678.16%	9.77%	5,527	6,342
13	Pacific Retirement Services, Inc. <sup>s</sup>	OR	529.76%	8.72%	2,421	2,878
9	Lutheran Senior Services	MO	363.53%	7.22%	2,512	3,203
10	The Kendal Corporation	PA	315.94%	6.69%	2,379	3,132
17	Ecumen	MN	294.11%	6.43%	1,947	2,609
15	Asbury Communities <sup>s</sup>	MD	214.97%	5.35%	1,881	2,756
8	Westminster Communities of Florida	FL	171.03%	4.64%	2,025	3,209
22	Franciscan Communities	IL	152.84%	4.31%	1,455	2,407
11	Presbyterian Senior Living	PA	121.52%	3.68%	1,711	3,119

\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2010 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,621/(17,245-14,621). Average Annual Growth was calculated by finding the geometric mean over the period (1, 11, or 21 years).

\*\* The system was founded after the beginning of the time period so they had zero units at the start of the period. Aggregate and Annual Growth rates can not be calculated in this case.

<sup>s</sup> At the beginning of the base year of the period, these organizations were single-site organizations.

## 5-6 2012 LeadingAge Ziegler 100

Growth: Rapid Changers

### 5-6d ORGANIZATIONS BY AGGREGATE GROWTH FOR THE GREATEST DECREASE

2012 Rank	System Name	State	Growth*		Units Removed	Total Units (as of 12/31/11)
			Aggregate Growth (%)	Average Annual Growth (%)		
Change in 2011 (n=100)						
31	Springpoint Senior Living	NJ	-15.91%	-15.91%	-320	1,691
67	United Methodist Homes	NY	-8.07%	-8.07%	-93	1,059
77	Presby's Inspired Life	PA	-7.07%	-7.07%	-73	959
18	Front Porch	CA	-6.90%	-6.90%	-189	2,551
93	Living Branches	PA	-5.07%	-5.07%	-45	843
42	Buckner Retirement Services, Inc.	TX	-3.83%	-3.83%	-59	1,481
84	Christian Care Centers	TX	-2.99%	-2.99%	-28	909
19	Diakon Lutheran Social Ministries	PA	-2.38%	-2.38%	-61	2,506
63	Sears Methodist Retirement System, Inc.	TX	-2.32%	-2.32%	-27	1,135
73	VMP	WI	-2.21%	-2.21%	-23	1,016
Change from 2000 to 2011 (n=100)						
59	American Baptist Homes of the Midwest	MN	-40.18%	-4.19%	-806	1,200
19	Diakon Lutheran Social Ministries	PA	-31.57%	-3.11%	-1,156	2,506
70	Walker Methodist	MN	-26.51%	-2.53%	-373	1,034
97	Christian Care Communities	KY	-11.98%	-1.06%	-109	801
91	Presbyterian Communities of South Carolina	SC	-8.86%	-0.77%	-83	854
75	United Church Homes	OH	-7.46%	-0.64%	-80	992
47	Mississippi Methodist Senior Services	MS	-7.40%	-0.64%	-111	1390
18	Front Porch	CA	-4.17%	-0.35%	-111	2551
89	Presbyterian Communities and Services	TX	-1.93%	-0.16%	-17	864
77	Presby's Inspired Life	PA	-0.52%	-0.04%	-5	959
Change from 1990 to 2011 (n=100)						
19	Diakon Lutheran Social Ministries	PA	-18.69%	-0.94%	-576	2,506
89	Presbyterian Communities and Services	TX	-1.93%	-0.09%	-17	864

\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2010 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,621/(17,245-14,621). Average Annual Growth was calculated by finding the geometric mean over the period (1, 11, or 21 years).

## 5-7 2012 LeadingAge Ziegler 100

### Growth: Profiles of Rapid Changers

#### **Greatest Percentage Increase in Units #36 Senior Quality Lifestyles Corporation (SQLC)**

Year Founded: 1999      Classification: Single State  
Senior VP: Charles Brewer      CFO: n/a

After searching for the right retirement setting for his mother, Charlie Brewer came to a conclusion: The best way to assure the finest lifestyle for seniors was to create it himself. He thus became founder, President and CEO of SQLC. This independent Texan spirit is at the heart of all SQLC communities. SQLC established its first community at [Edgemere](#) in Dallas (2001), followed by The Buckingham in Houston (2005) and [Querencia](#) at Barton Creek in Austin (2007).

During 2011, SLQC opened the doors of two new facilities. In October 2011, residents moved into The Stayton at Museum Way. The Stayton at Museum Way is located in Fort Worth, Texas and consists of 181 independent living units, 42 assisted living units, 20 memory support units and 46 nursing care beds. Construction of the Mirador a continuing retirement community in Corpus Christi, Texas was substantially completed in June 2011. The Mirador consists of 125 independent living units, 44 assisted living units, 18 memory support units and 41 private health center beds.

According to President and CEO Charlie Brewer, “Our goal is to bring you a five start lifestyle that appeals to your five senses. Our business structure—as a not-for-profit and as a lean, locally focused organization---gives us powerful competitive advantages. The energy behind that strength comes from a select group of strategic partners who have helped build our track record of success.”

#### **System size as of 12/31/11**

ILU	989
ALU	337
NCB	261
<b>1,587</b>	<b>Total</b>

## 5-7 2012 LeadingAge Ziegler 100

### Growth: Profiles of Rapid Changers

#### **Greatest Percentage Decrease in Units #31 Springpoint Senior Living**

Year Founded: 1916      Classification: Single State  
CEO: Gary Puma      CFO: Garrett Midgett III

Since 1916, Springpoint Senior Living has been helping seniors live rich lives. During 2010, the New Jersey organization changed its name from PHS Senior Living with the goal of refreshing the 90-year old company's heritage.

During 2011, Springpoint Senior Living sold its four free-standing assisted living communities, Haddonfield Home Assisted Living, Stony Brook Assisted Living, Watchung Ridge Assisted Living and Waterford Glen Assisted Living. This strategy of exiting the free-standing assisted living business allowed them to focus on their existing full-service retirement and affordable housing communities by creating additional resources and reducing their debt by eighteen percent. The organization has also completed financing and broken ground on its newest addition to the Springpoint family, The Atrium at Navesink Harbor, a 60-unit addition, which will be available for occupancy the first quarter of 2013.

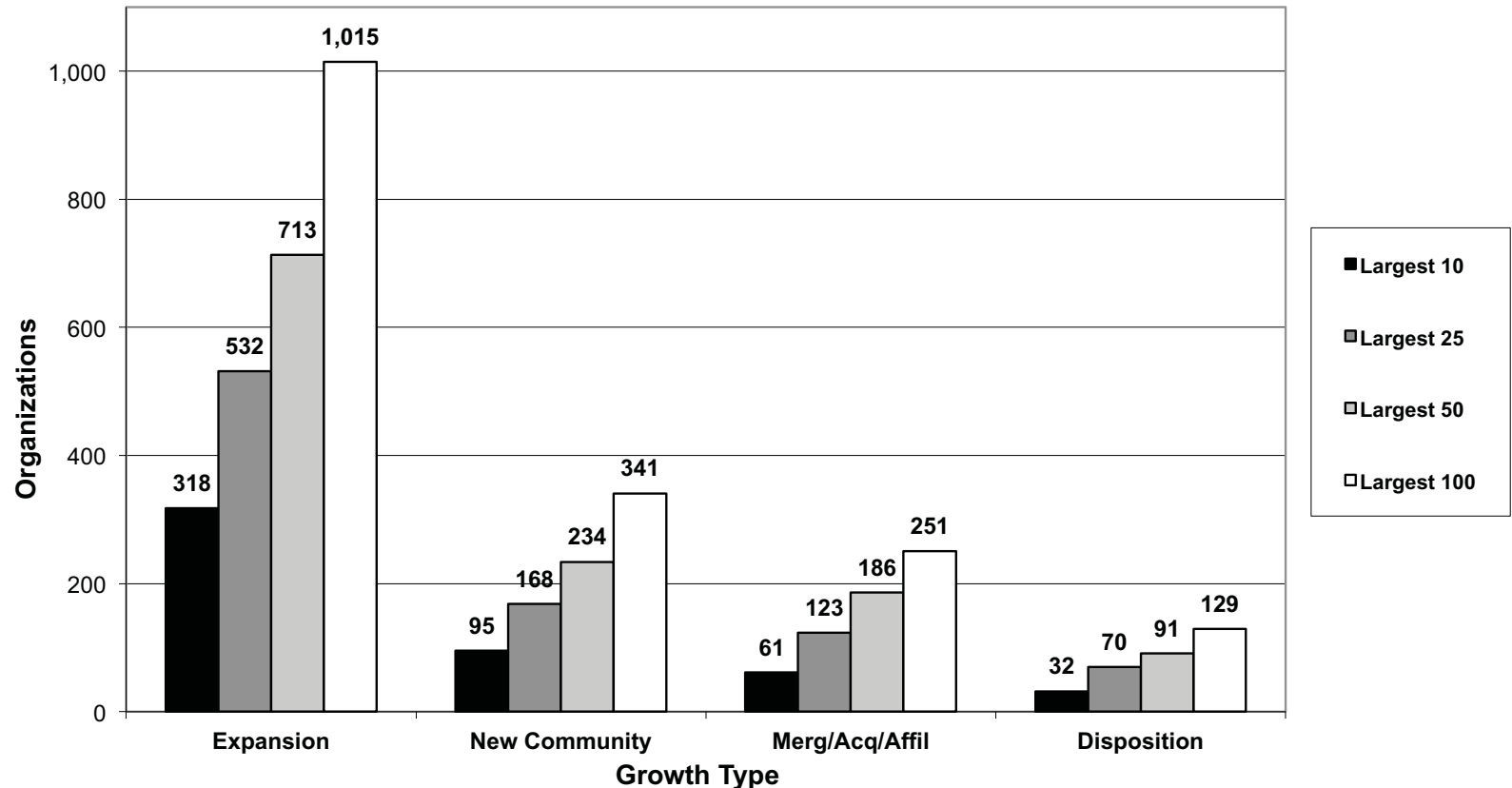
#### **System size as of 12/31/11**

ILU	1,254
ALU	179
NCB	267
<b>1,615</b>	<b>Total</b>

## 5-8 2012 LeadingAge Ziegler 100

### Growth: Type of Growth by Organizations

5-8a NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1980 THROUGH 2011



**Expansion:** The addition of new units to an existing community.

Note: If a new community is added to an existing campus this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

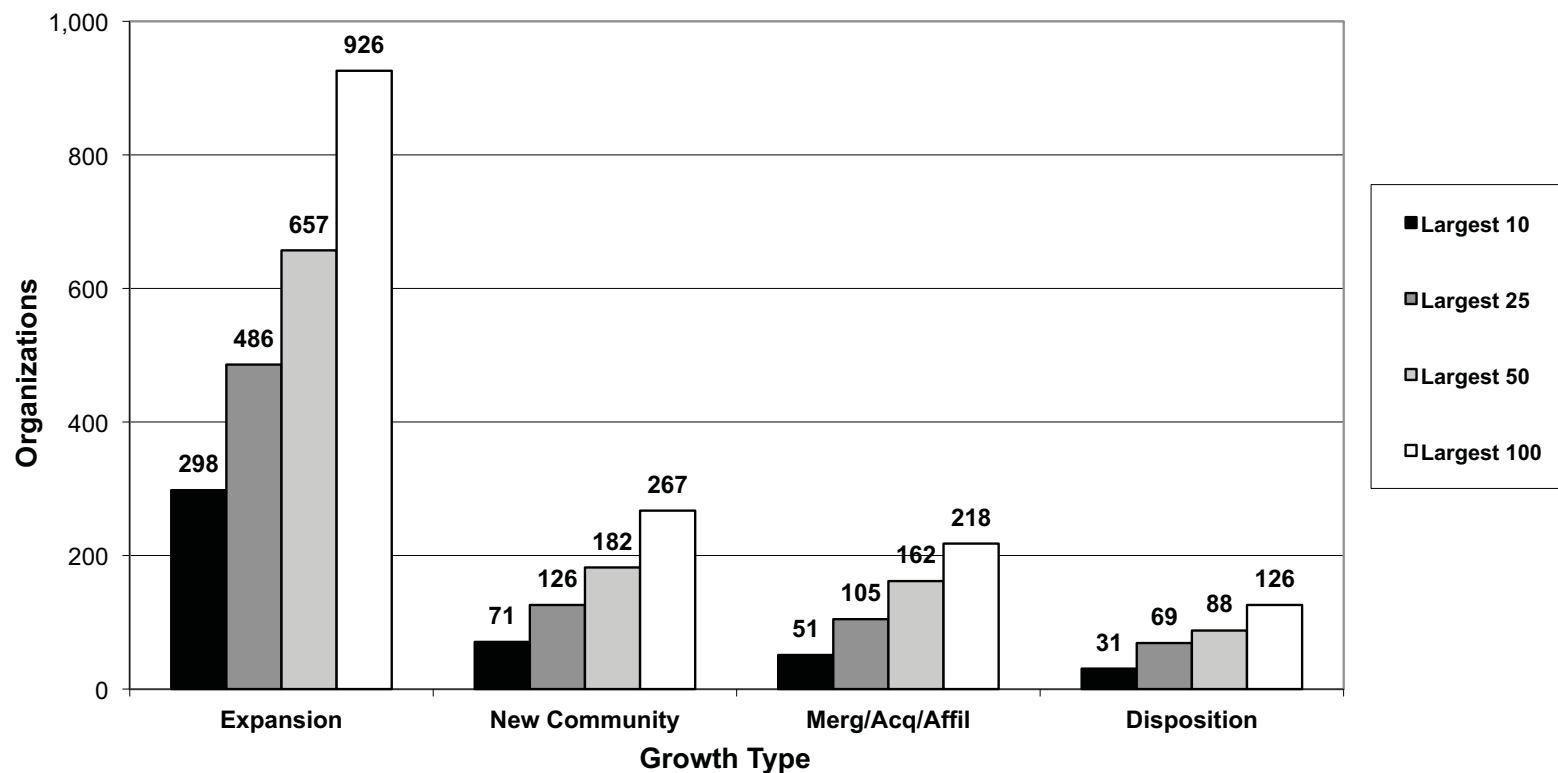
**Disposition:** The sale or closure of a community.



## 5-8 2012 LeadingAge Ziegler 100

### Growth: Type of Growth by Organizations

5-8b NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1990 THROUGH 2011



**Expansion:** The addition of new units to an existing community.

Note: If a new community is added to an existing campus this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

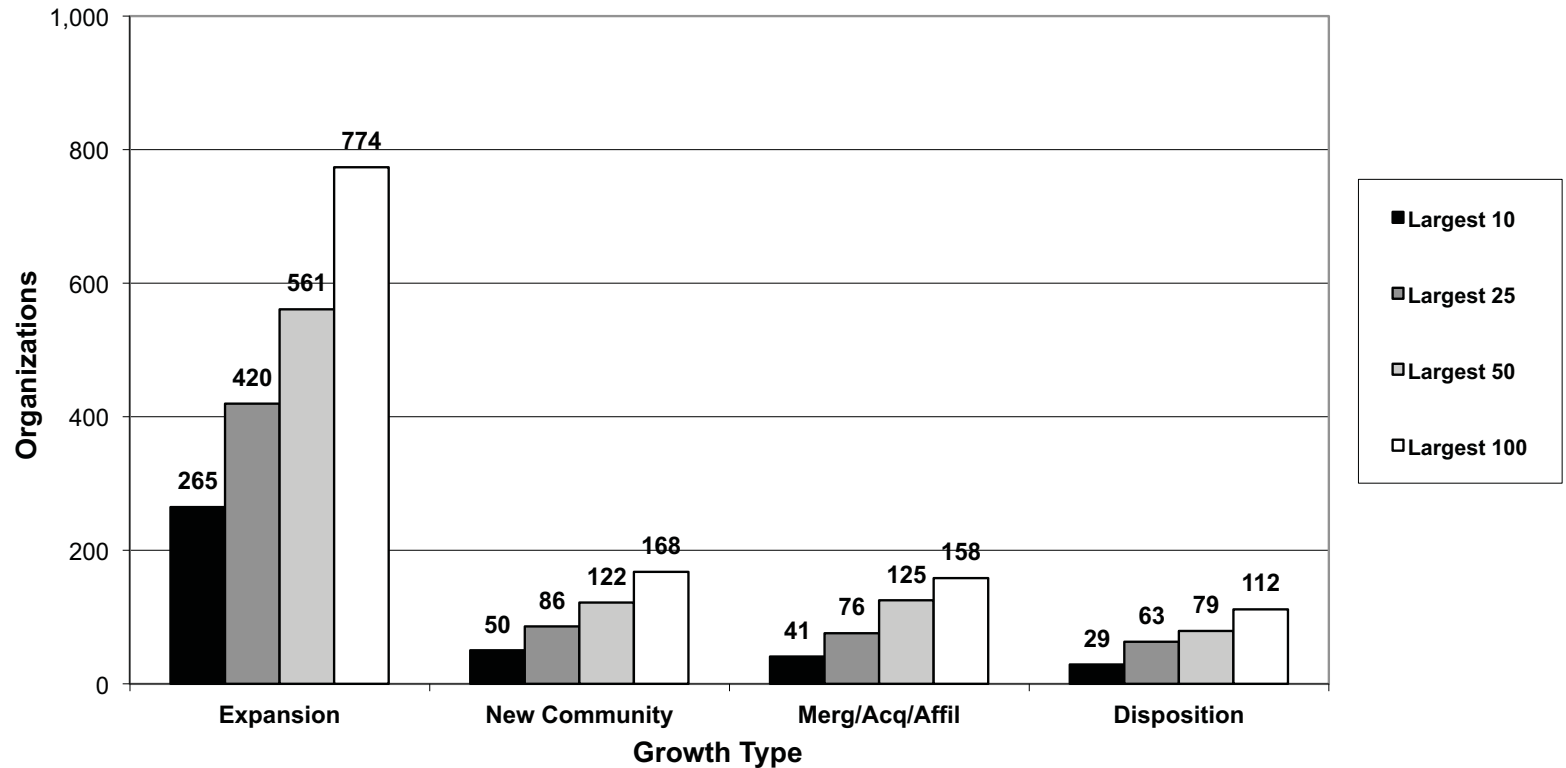
**Disposition:** The sale or closure of a community.



## 5-8 2012 LeadingAge Ziegler 100

### Growth: Type of Growth by Organizations

#### 5-8c NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 2000 THROUGH 2011



**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus this is also considered an expansion.  
**New Community:** Growth by the addition of units through construction of a new location.

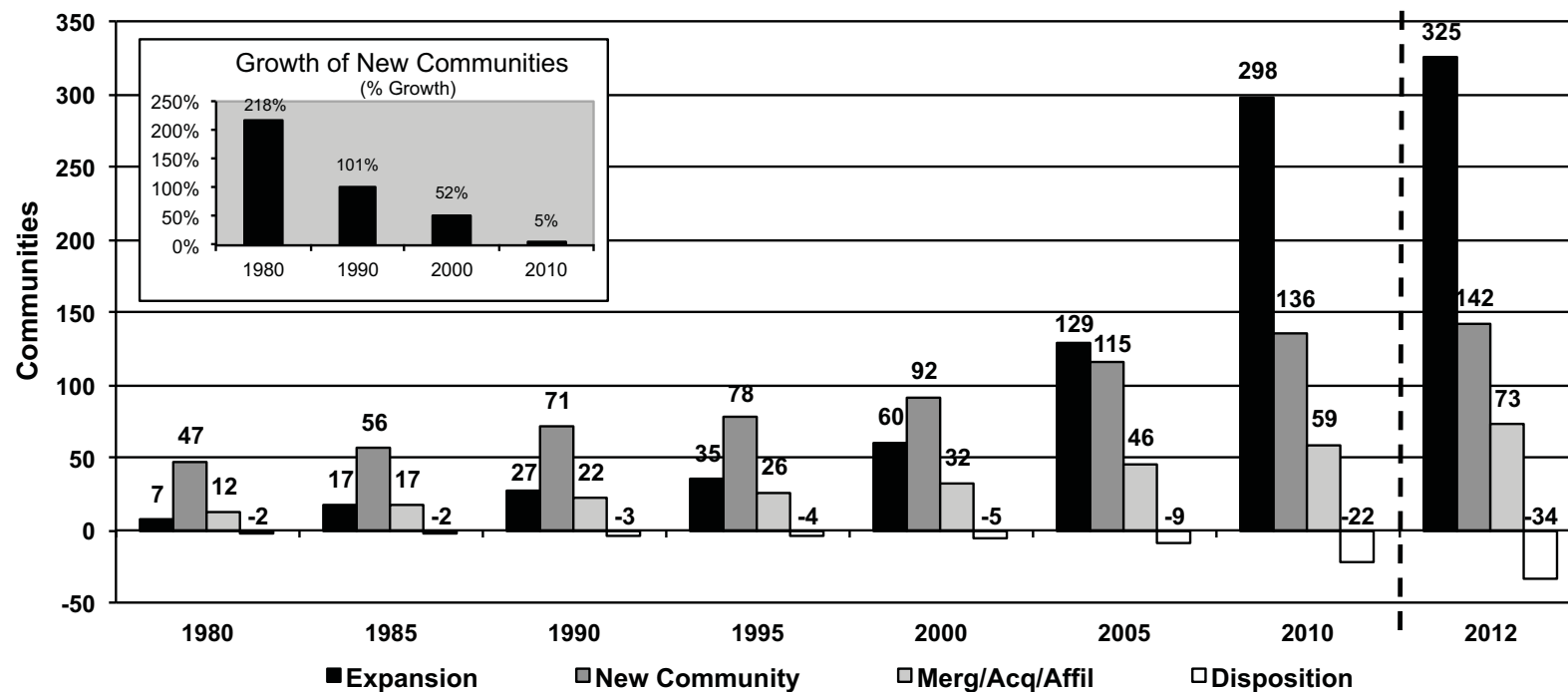
**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.  
**Disposition:** The sale or closure of a community.

## 5-9 2012 LeadingAge Ziegler 100

### Growth: Type of Growth by Communities

#### 5-9a CUMULATIVE GROWTH OF LARGEST 10 SYSTEMS

\*Cumulative totals are as of 1/1 of that year



**Expansion:** The addition of new units to an existing community.

Note: If a new community is added to an existing campus this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

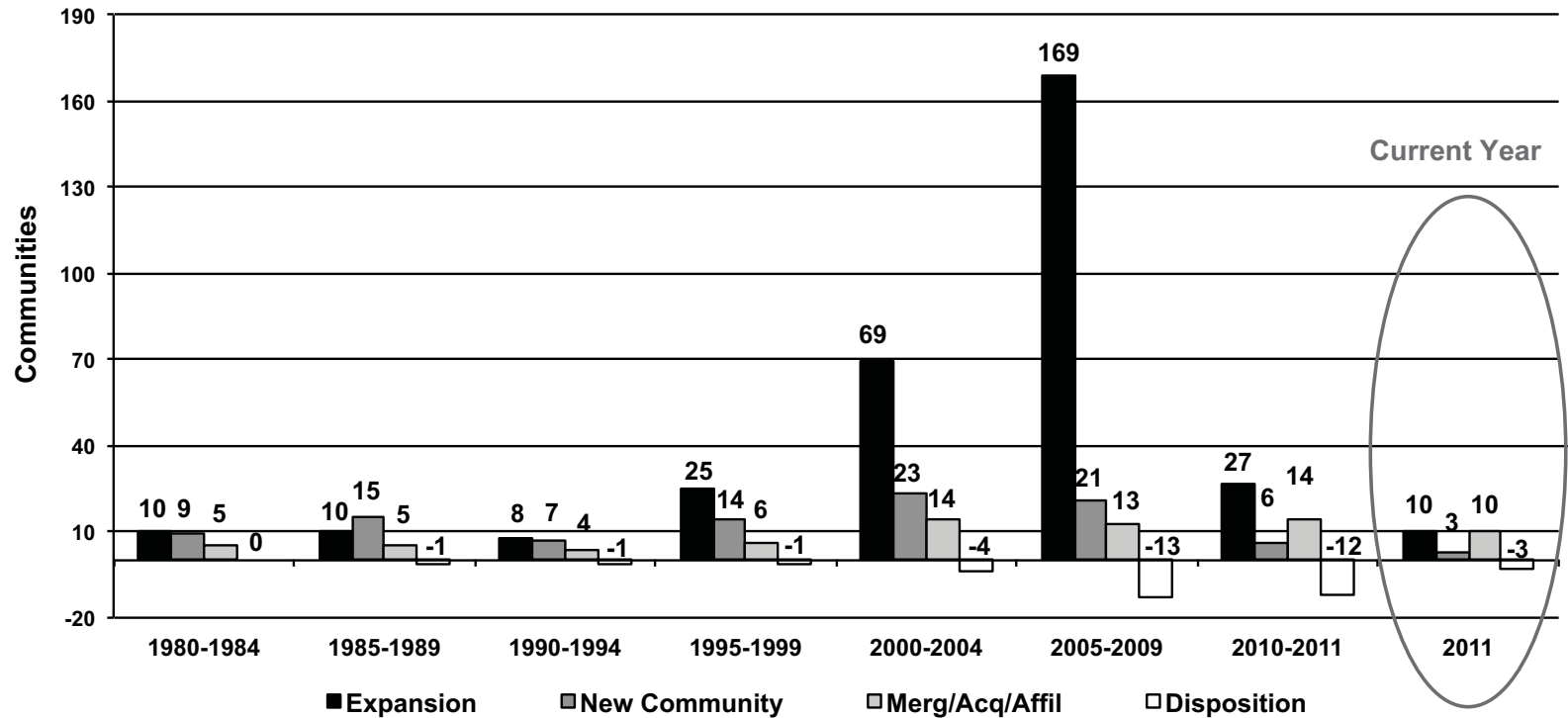
**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

**Disposition:** The sale or closure of a community.

## 5-9 2012 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

### 5-9b INCREMENTAL GROWTH OF LARGEST 10 SYSTEMS



**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

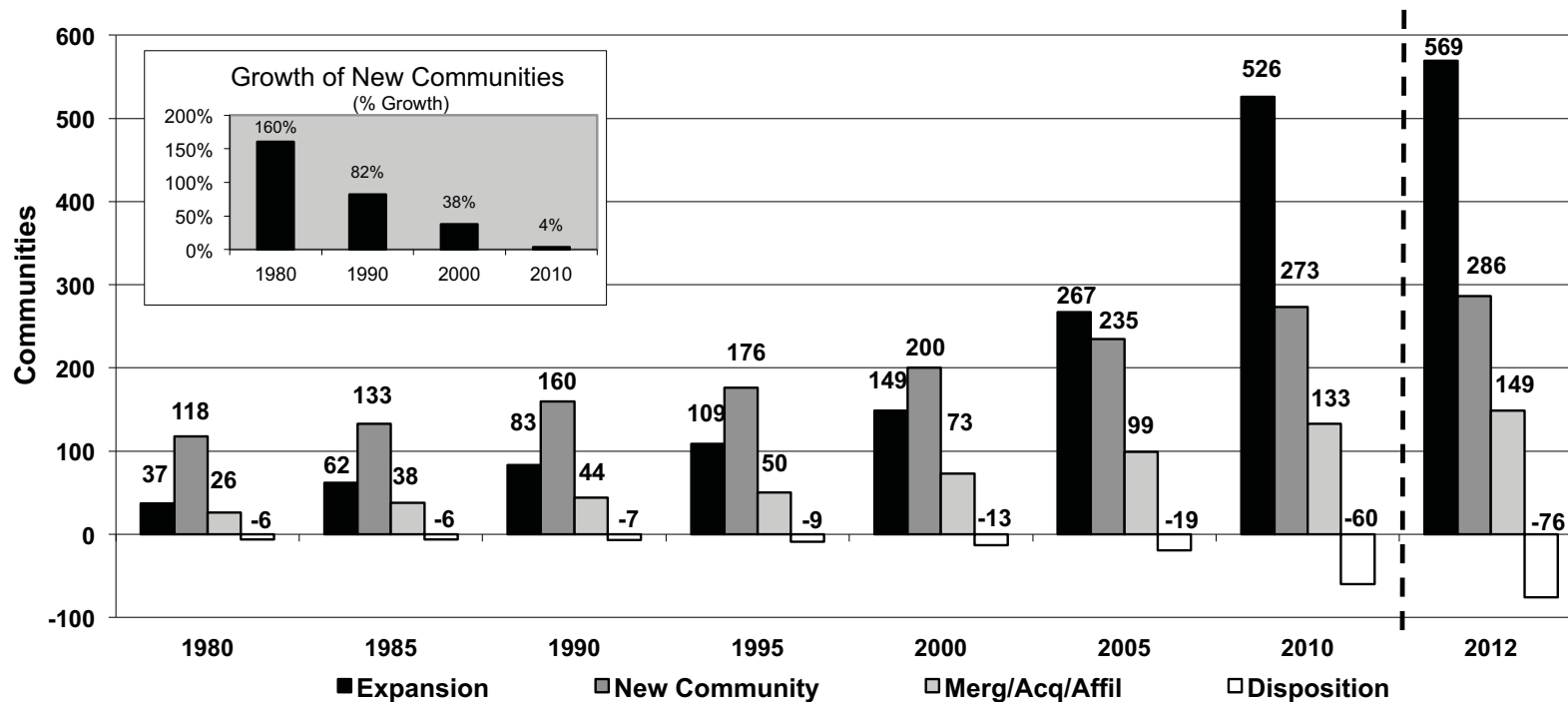
**Disposition:** The sale or closure of a community.

## 5-9 2012 LeadingAge Ziegler 100

### Growth: Type of Growth by Communities

#### 5-9c CUMULATIVE GROWTH OF LARGEST 25 SYSTEMS

\*Cumulative totals are as of 1/1 of that year



**Expansion:** The addition of new units to an existing community.

Note: If a new community is added to an existing campus this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

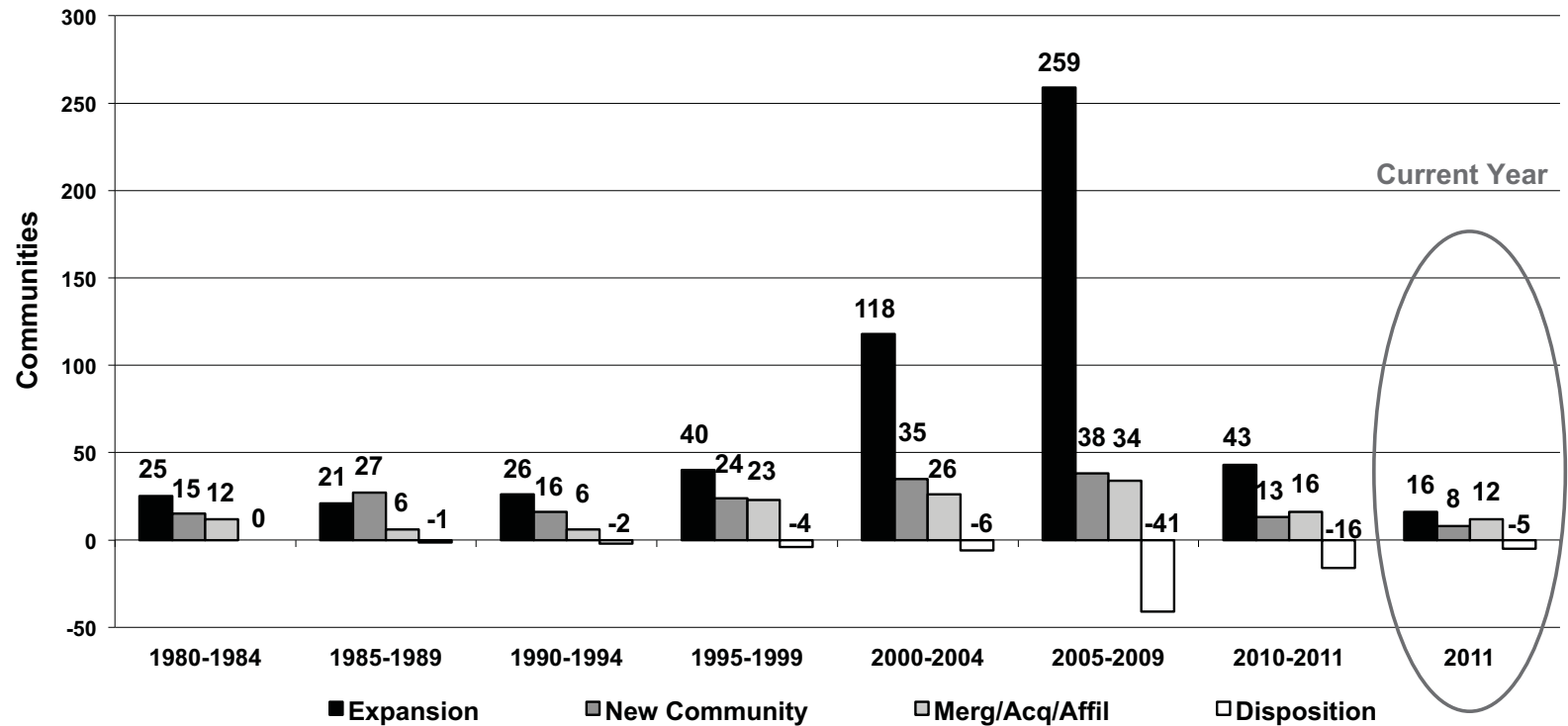
**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

**Disposition:** The sale or closure of a community.

## 5-9 2012 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

### 5-9d INCREMENTAL GROWTH OF LARGEST 25 SYSTEMS



**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

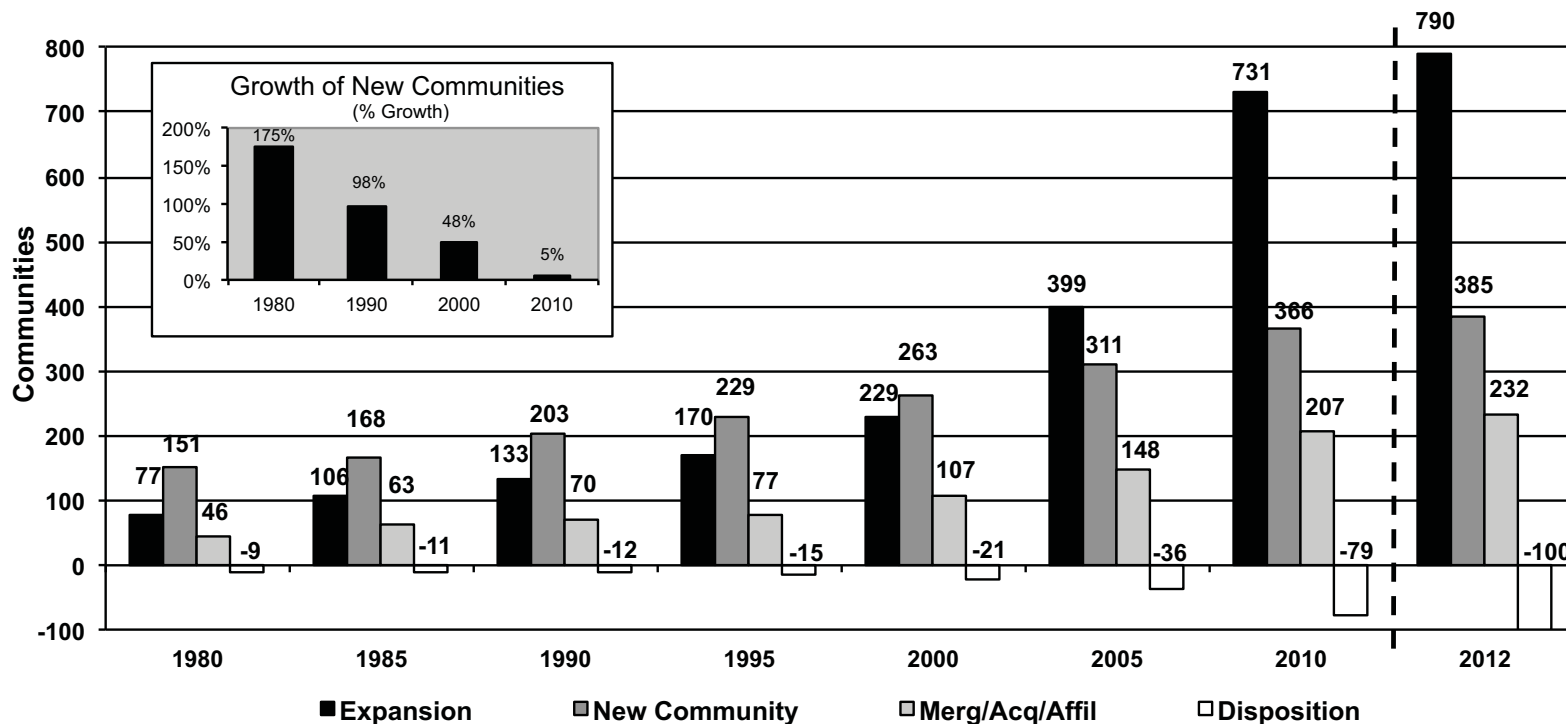
**Disposition:** The sale or closure of a community.

## 5-9 2012 LeadingAge Ziegler 100

### Growth: Type of Growth by Communities

#### 5-9e CUMULATIVE GROWTH OF LARGEST 50 SYSTEMS

\*Cumulative totals are as of 1/1 of that year



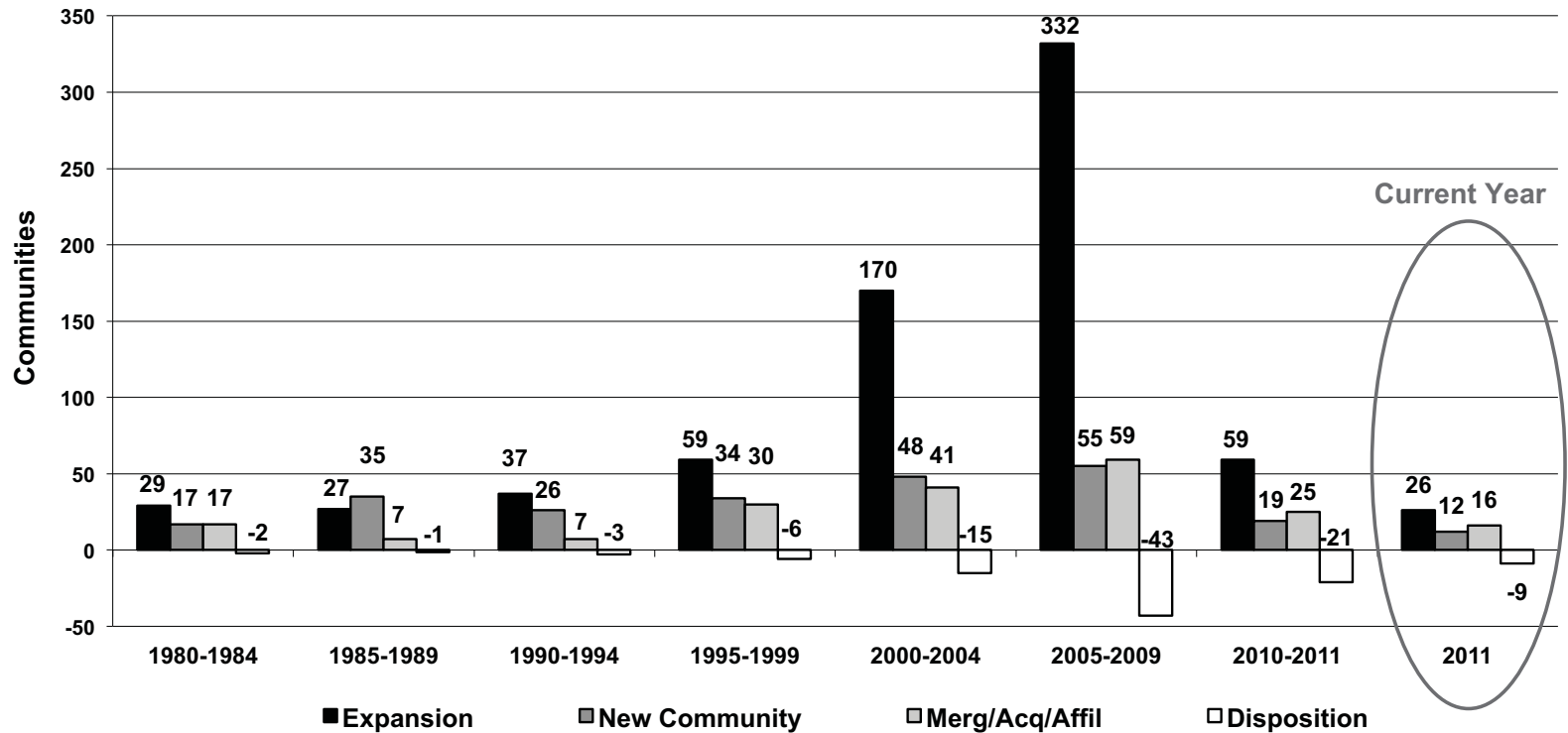
**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus this is also considered an expansion.  
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.  
**Disposition:** The sale or closure of a community.

## 5-9 2012 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

### 5-9f INCREMENTAL GROWTH OF LARGEST 50 SYSTEMS



**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus this is also considered an expansion.  
**New Community:** Growth by the addition of units through construction of a new location.

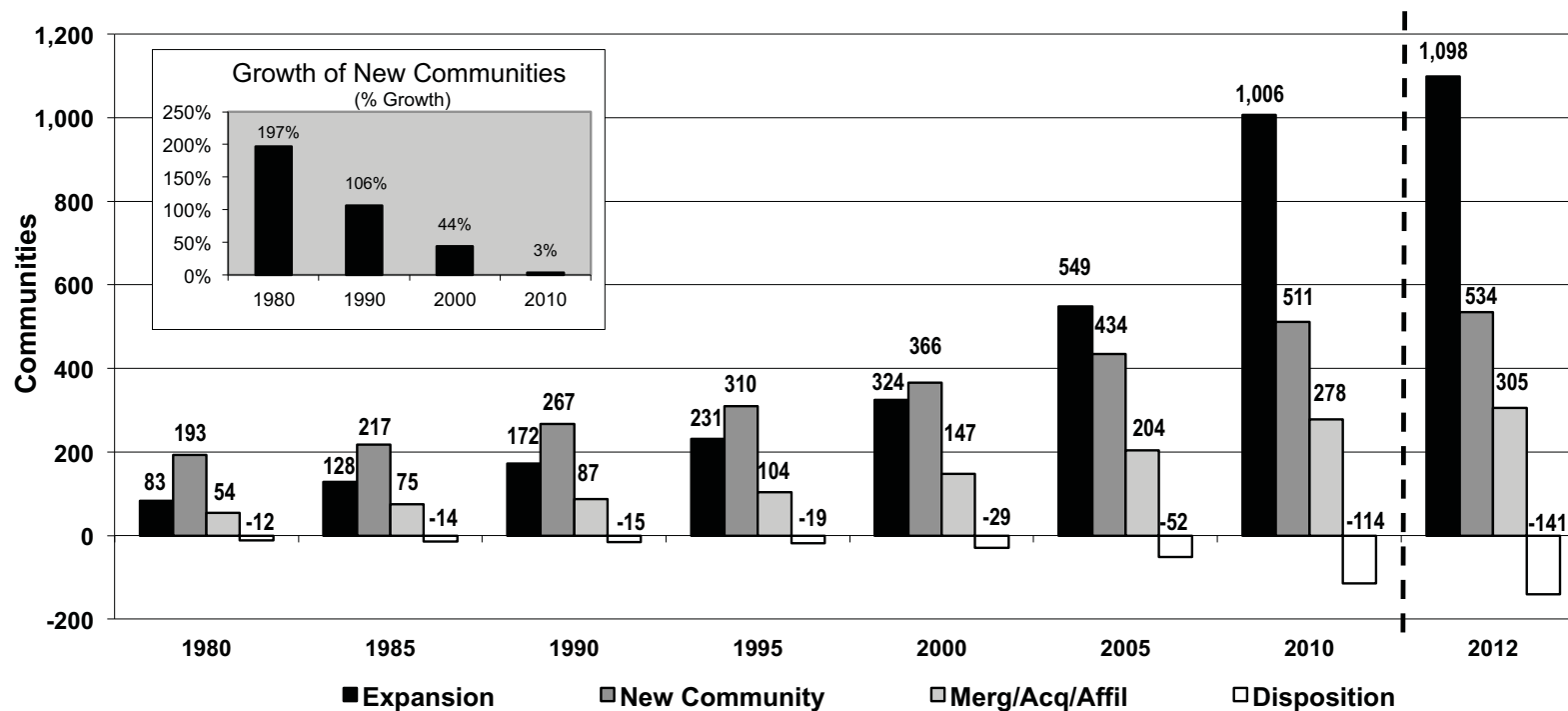
**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.  
**Disposition:** The sale or closure of a community.

## 5-9 2012 LeadingAge Ziegler 100

### Growth: Type of Growth by Communities

#### 5-9g CUMULATIVE GROWTH OF LZ 100

\*Cumulative totals are as of 1/1 of that year



**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus this is also considered an expansion.  
**New Community:** Growth by the addition of units through construction of a new location.

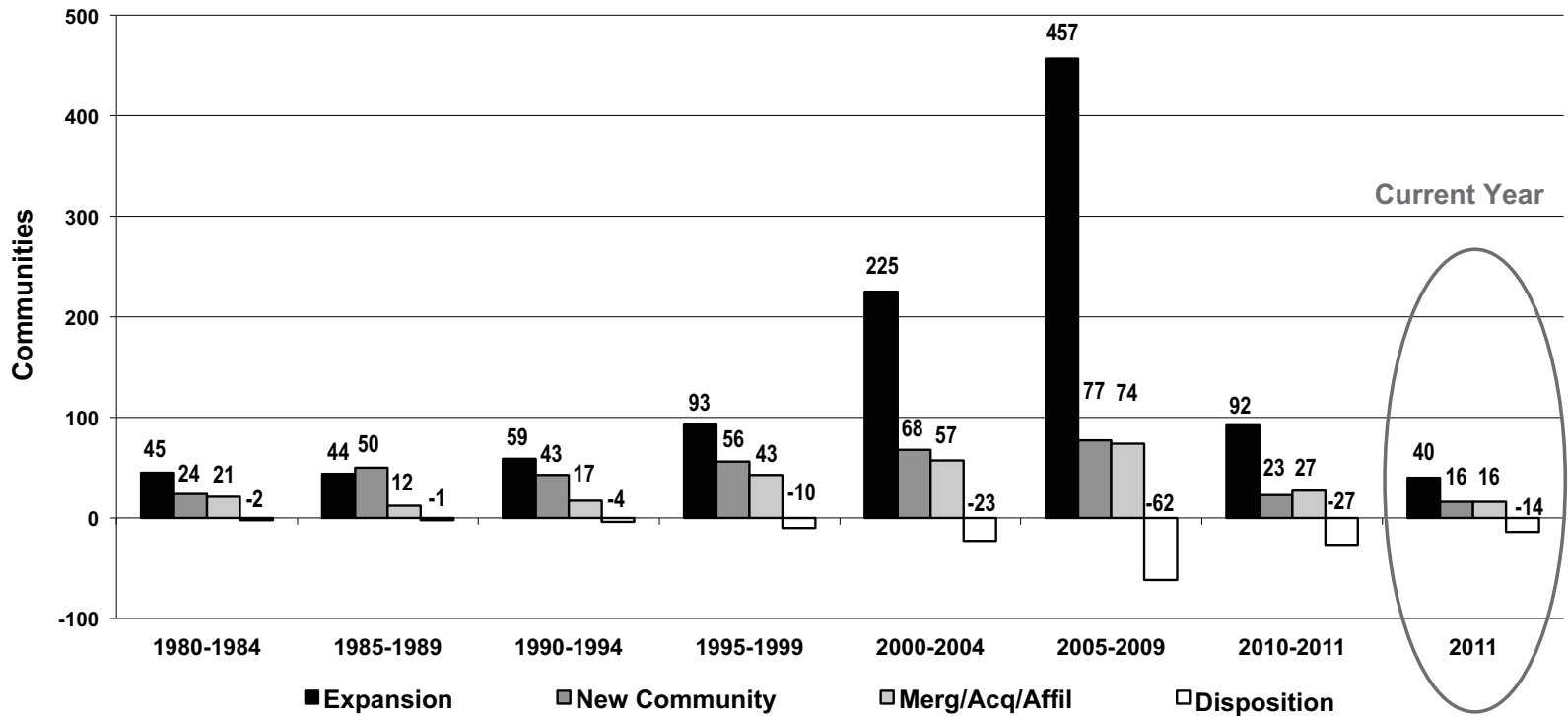
**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.  
**Disposition:** The sale or closure of a community.



## 5-9 2012 LeadingAge Ziegler 100

Growth: Type of Growth by Communities

### 5-9h INCREMENTAL GROWTH OF LZ 100



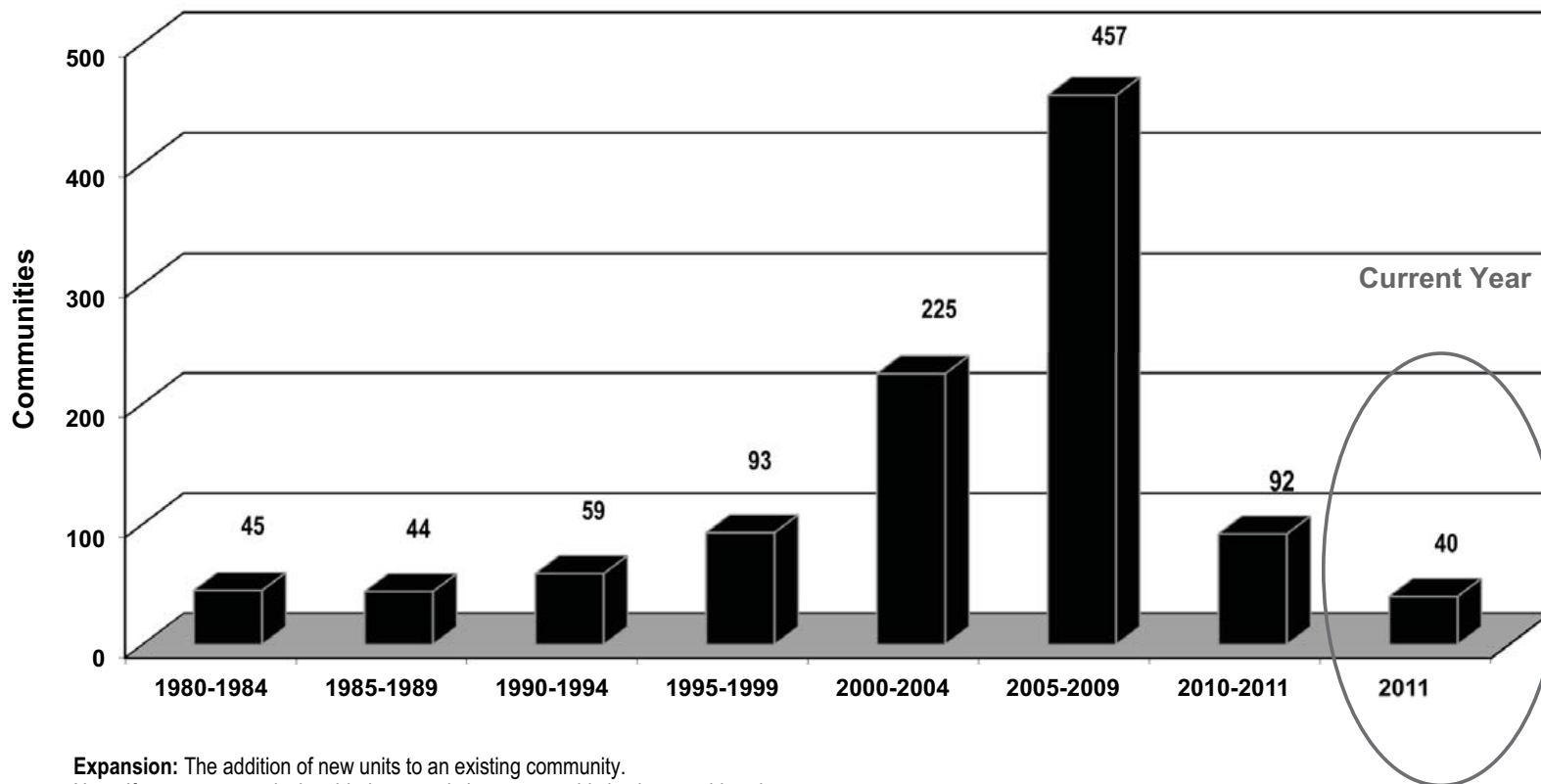
**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus this is also considered an expansion.  
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.  
**Disposition:** The sale or closure of a community.

## 5-10 2012 LeadingAge Ziegler 100

Growth: Expansions

5-10 HISTORICAL GROWTH



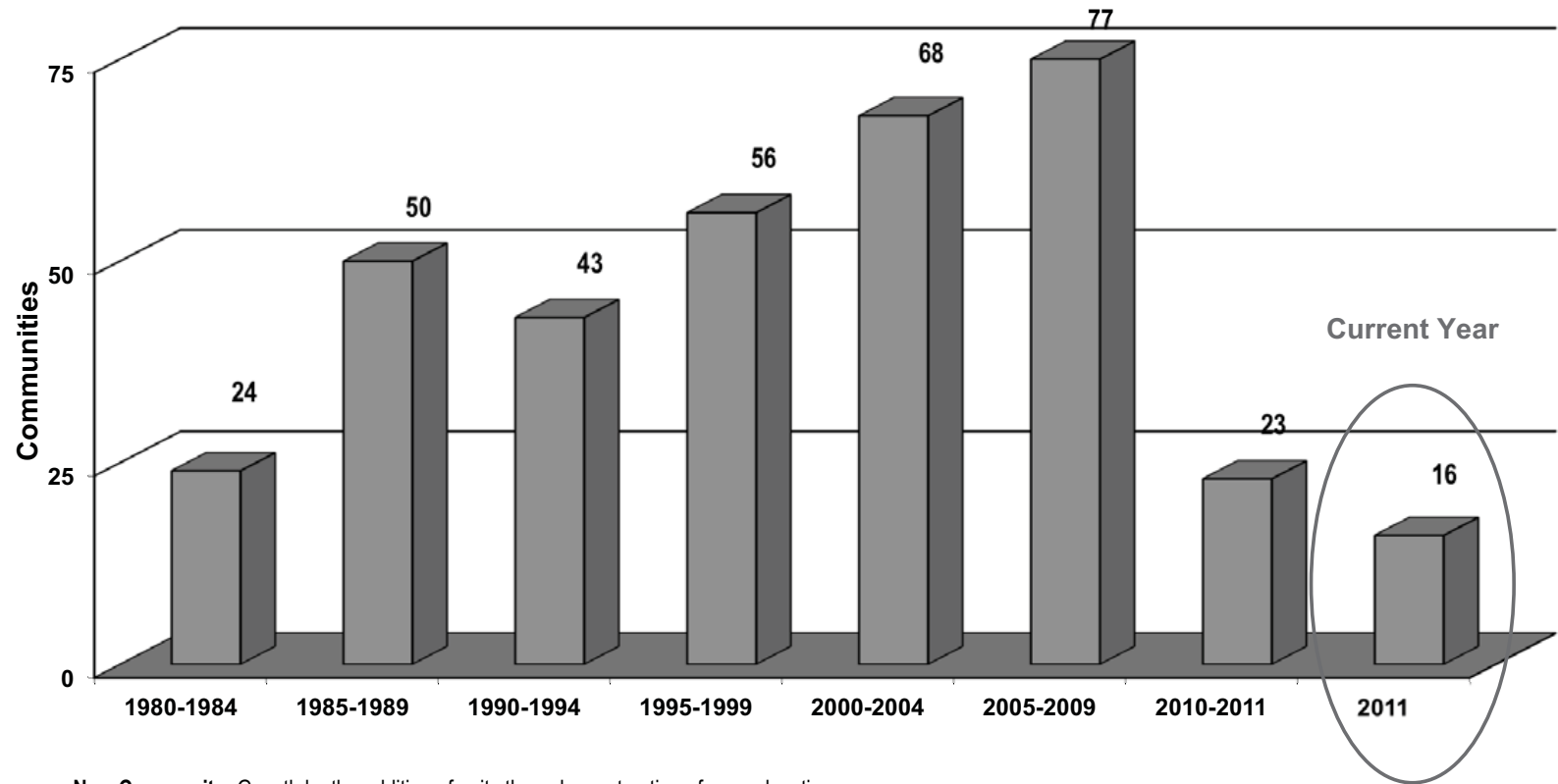
**Expansion:** The addition of new units to an existing community.

Note: If a new community is added to an existing campus this is also considered an expansion.

## 5-11 2012 LeadingAge Ziegler 100

Growth: New Communities

5-11a HISTORICAL GROWTH



**New Community:** Growth by the addition of units through construction of a new location.

## 5-11 2012 LeadingAge Ziegler 100

Growth: New Communities

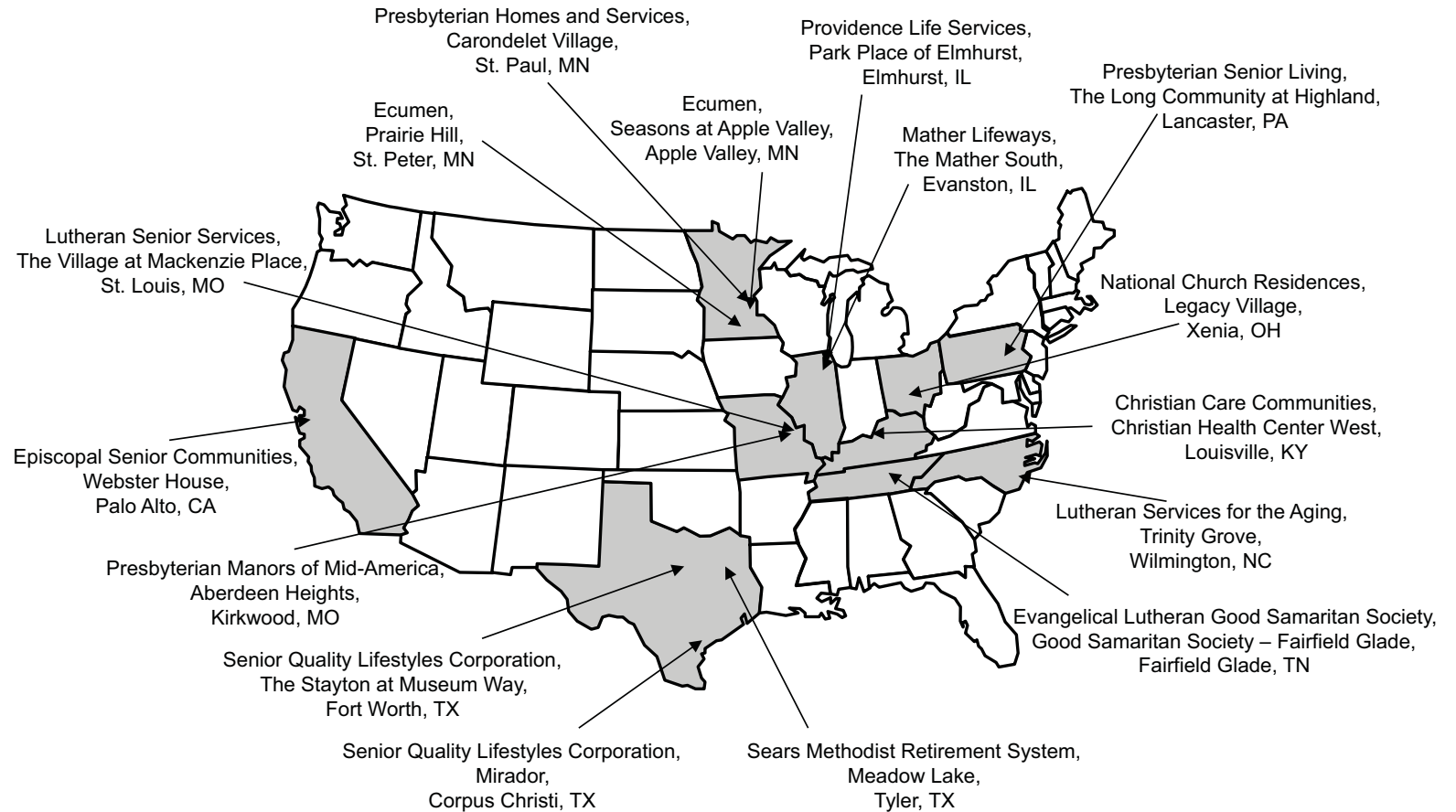
### 5-11b 2011 COMMUNITY OPENINGS

2012 Rank	System Name	Community	City	State	Community Type
1	Evangelical Lutheran Good Samaritan Society	The Good Samaritan Society - Fairfield Glade	Crossville	TN	CCRC
4	Presbyterian Homes and Services	Carondelet Village	Saint Paul	MN	CCRC
9	Lutheran Senior Services	The Village at Mackenzie Place	St. Louis	MO	ILF
11	Presbyterian Senior Living	The Long Community at Highland	Lancaster	PA	ILF
17	Ecumen	Seasons at Apple Valley	Apple Valley	MN	ALF
17	Ecumen	Prairie Hill	St. Peter	MN	ALF
20	Presbyterian Manors of Mid-America	Aberdeen Heights	Kirkwood	MO	CCRC
25	Providence Life Services	Park Place of Elmhurst	Elmhurst	IL	CCRC
36	Senior Quality Lifestyles Corporation	The Stayton at Museum Way	Fort Worth	TX	CCRC
36	Senior Quality Lifestyles Corporation	Mirador	Corpus Christi	TX	CCRC
38	National Church Residences	Legacy Village	Xenia	OH	CCRC
40	Episcopal Senior Communities	Webster House	Palo Alto	CA	CCRC
51	Lutheran Services for the Aging	Trinity Grove	Wilmington	NC	SNF
63	Sears Methodist Retirement System	Meadow Lake	Tyler	TX	CCRC
86	Mather Lifeways	The Mather South	Evanston	IL	ILF
97	Christian Care Communities	Christian Health Center West	Louisville	KY	SNF

## 5-11 Growth: New Communities

### Growth: New Communities

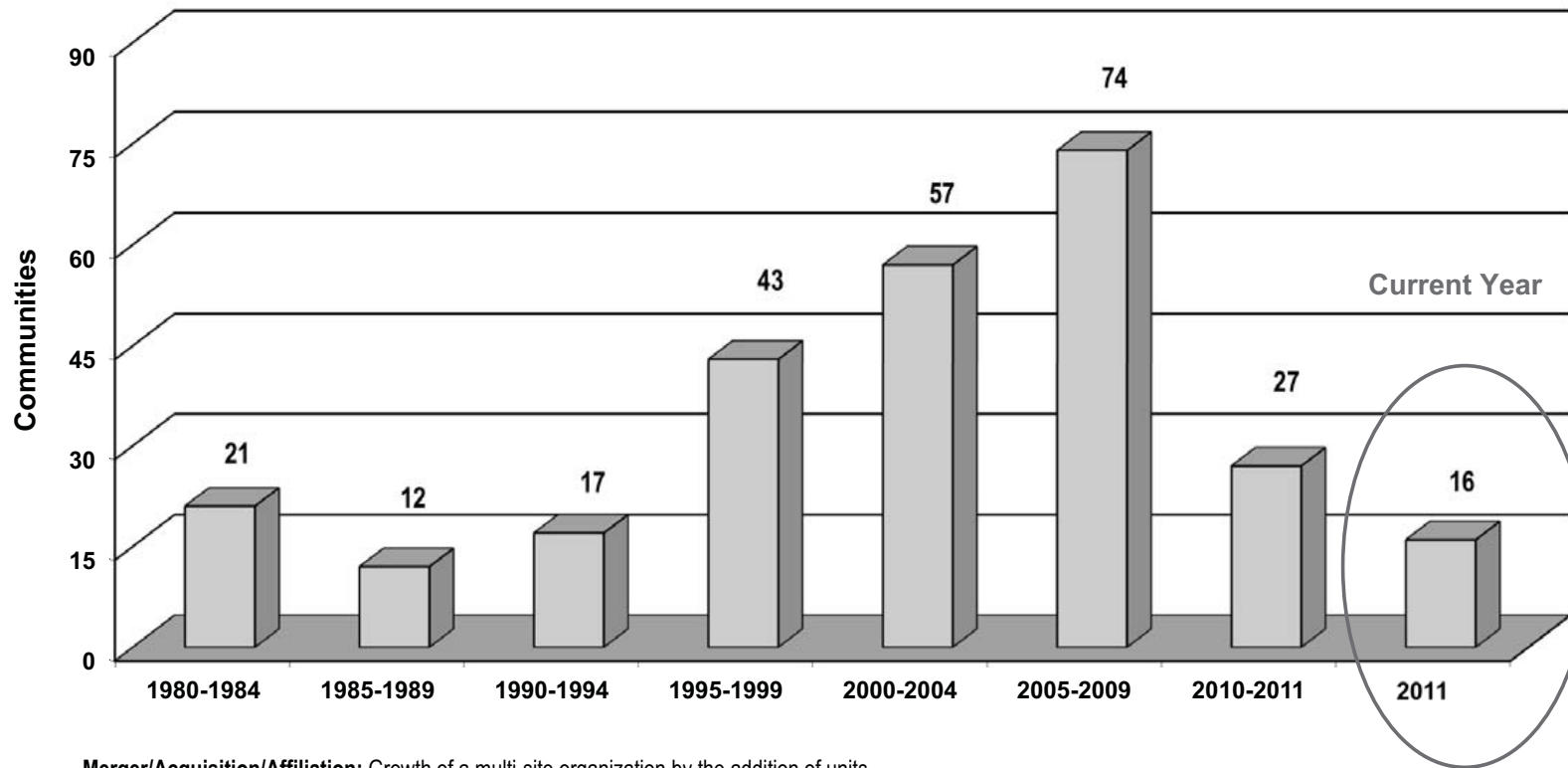
#### 5-11c 2011 LOCATIONS



## 5-12 2012 LeadingAge Ziegler 100

Growth: Mergers/Acquisitions/Affiliations

### 5-12a HISTORICAL GROWTH



**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

## 5-12 2012 LeadingAge Ziegler 100

### Growth: Mergers/Acquisitions/Affiliations

#### 5-12b 2011 MERGERS/ACQUISITIONS/AFFILIATIONS

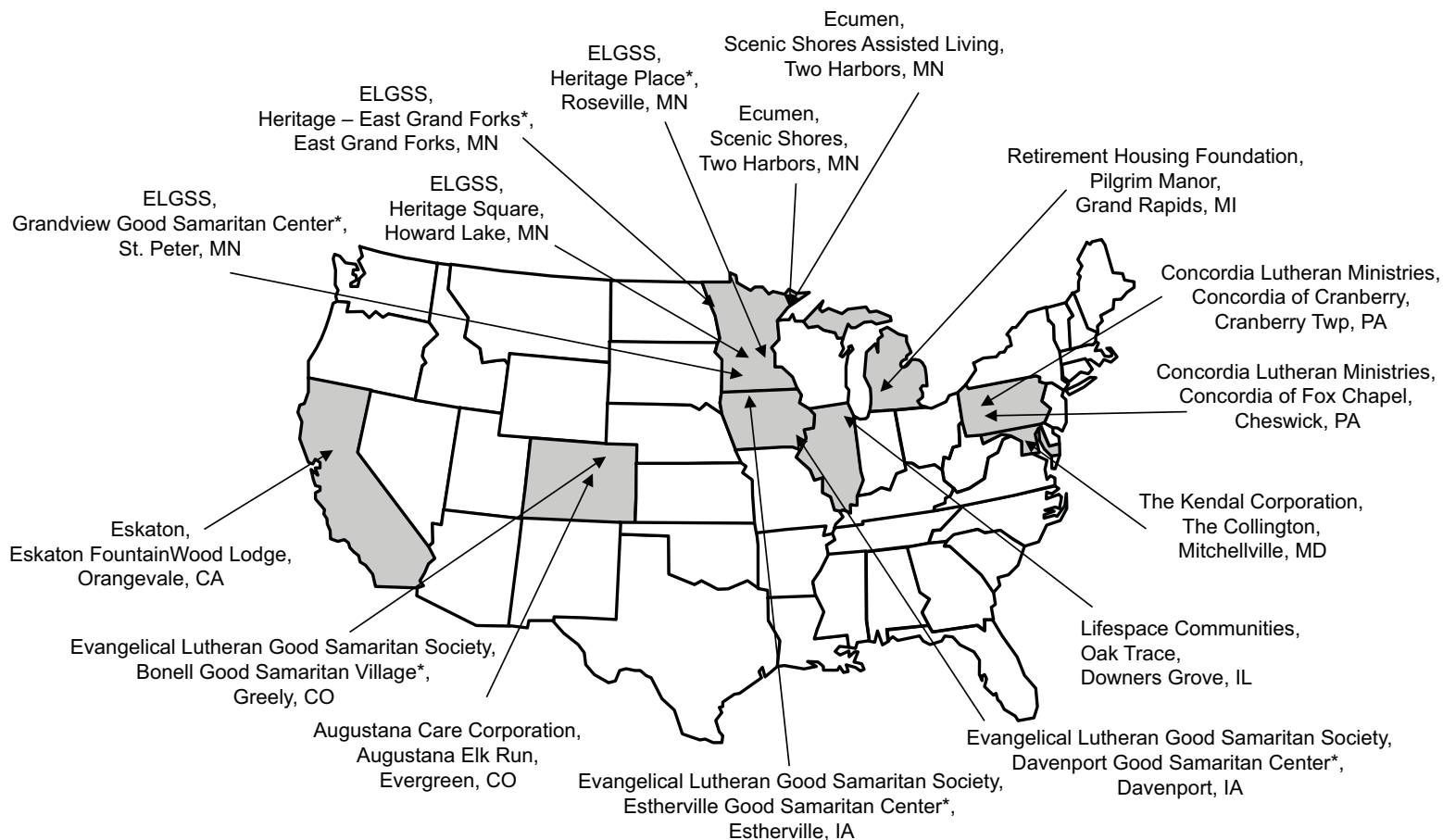
2012 Rank	System Name	Community	City	State	Community Type
1	Evangelical Lutheran Good Samaritan Society	Bonell Good Samaritan Village*	Greeley	CO	CCRC
1	Evangelical Lutheran Good Samaritan Society	Davenport Good Samaritan Center*	Davenport	IA	CCRC
1	Evangelical Lutheran Good Samaritan Society	Estherville Good Samaritan Center*	Estherville	IA	CCRC
1	Evangelical Lutheran Good Samaritan Society	Heritage - East Grand Forks*	East Grand Forks	MN	ALF
1	Evangelical Lutheran Good Samaritan Society	Heritage Square	Howard Lake	MN	ILF
1	Evangelical Lutheran Good Samaritan Society	Heritage Place*	Roseville	MN	ILF
1	Evangelical Lutheran Good Samaritan Society	Grandview Good Samaritan Center*	St. Peter	MN	CCRC
6	Retirement Housing Foundation	Pilgrim Manor	Grand Rapids	MI	ALF
7	Lifespace Communities	Oak Trace	Downers Grove	IL	CCRC
10	The Kendal Corporation	The Collington	Mitchellville	MD	CCRC
17	Ecumen	Scenic Shores	Two Harbors	MN	SNF
17	Ecumen	Scenic Shores Assisted Living	Two Harbors	MN	ALF
26	Augustana Care Corporation	Augustana Elk Run	Evergreen	CO	ALF
37	Eskaton	Eskaton FountainWood Lodge	Orangevale	CA	ALF
46	Concordia Lutheran Ministries	Concordia of Cranberry	Cranberry Township	PA	ALF
46	Concordia Lutheran Ministries	Concordia of Fox Chapel	Cheswick	PA	ALF

\* Acquisition of a previous Joint Venture

## 5-12 Growth: Mergers/Acquisitions/Affiliations

### Growth: Mergers/Acquisitions/Affiliations

#### 5-12c 2011 LOCATIONS



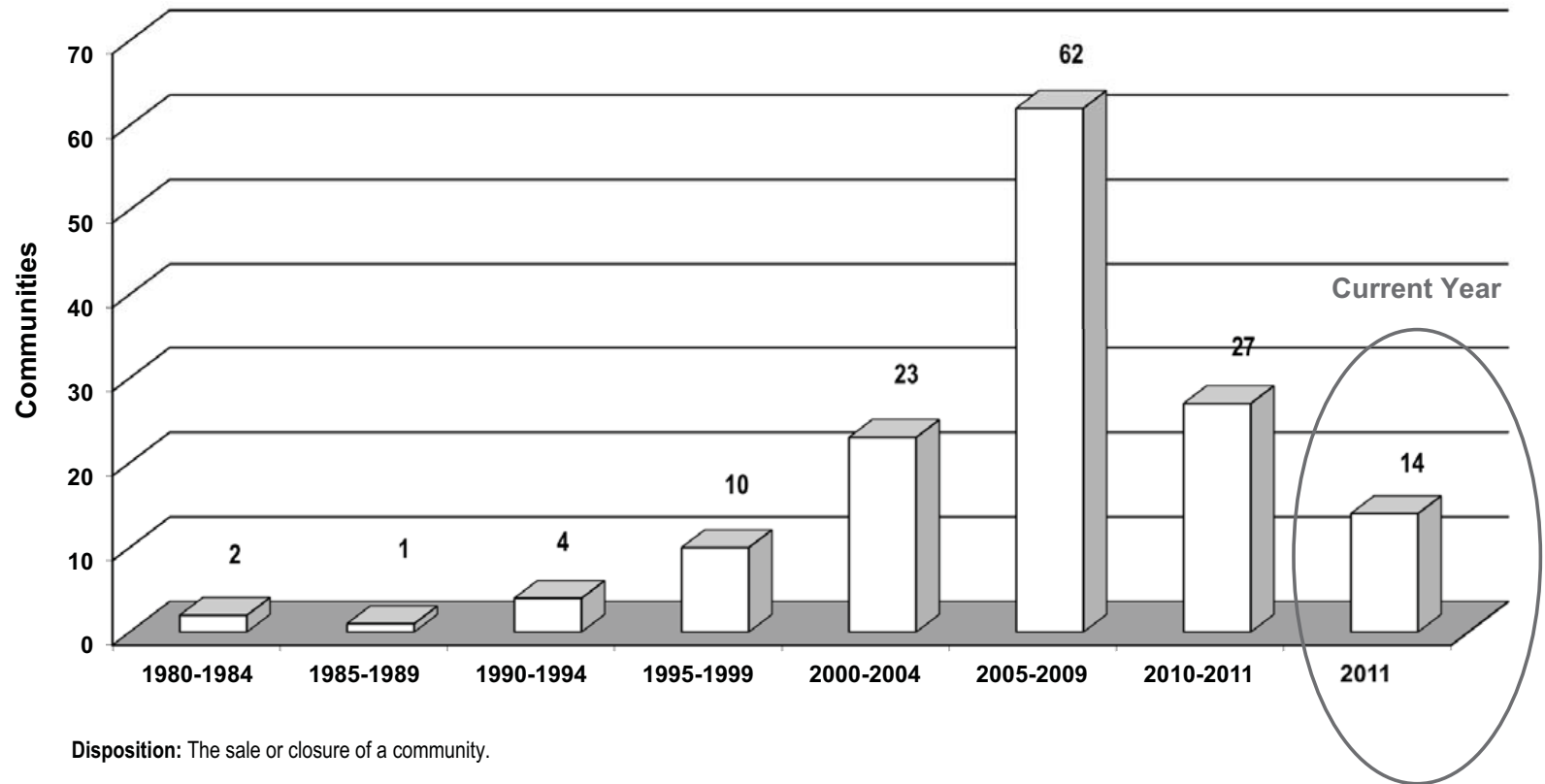
\* Acquisitions of communities that were previously joint ventures.



## 5-13 2012 LeadingAge Ziegler 100

Growth: Dispositions

5-13a HISTORICAL GROWTH



## 5-13 2012 LeadingAge Ziegler 100

### Growth: Dispositions

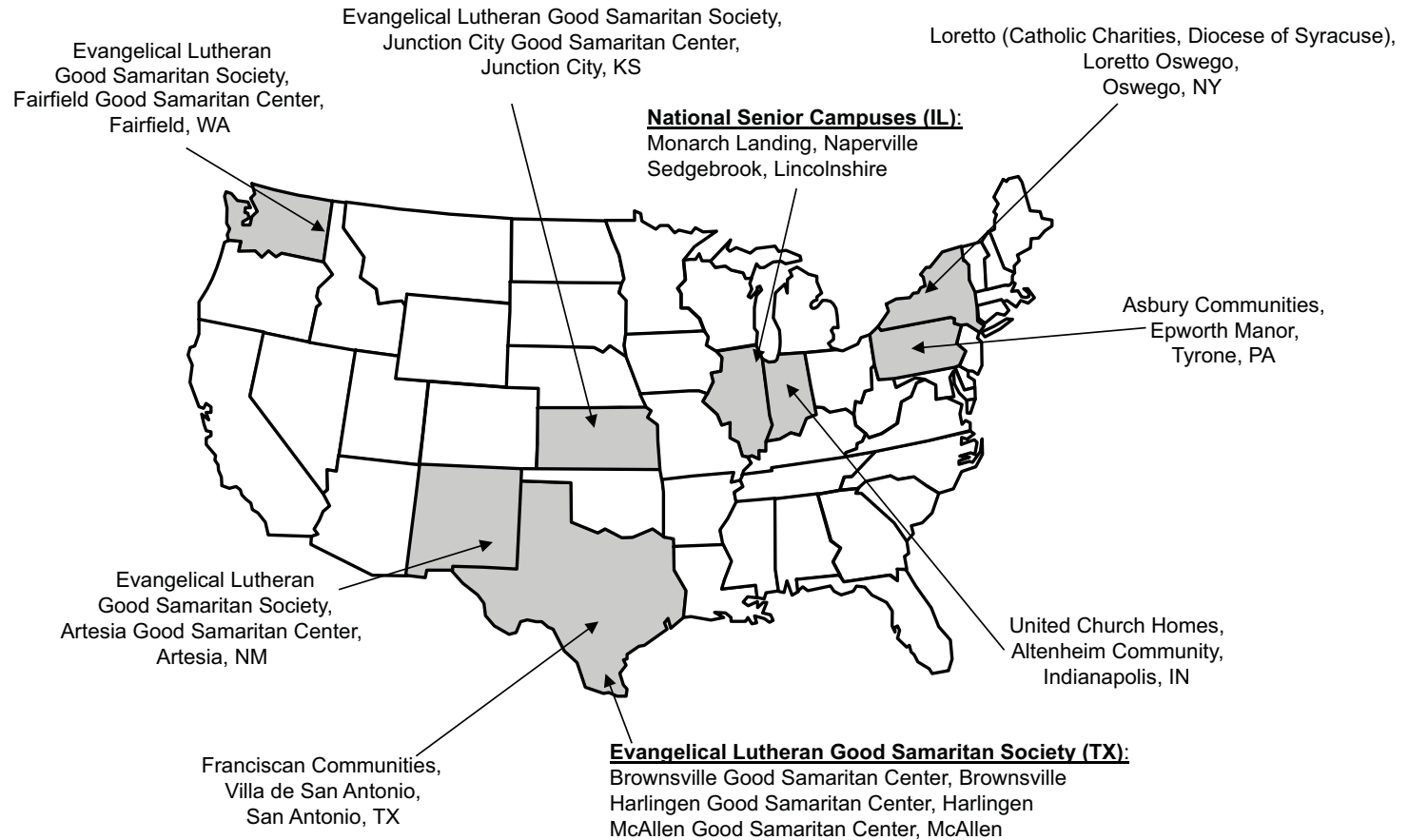
#### 5-13b 2011 COMMUNITY CLOSURES OR DISPOSITIONS

2012 Rank	System Name	Community	City	State	Community Type
1	Evangelical Lutheran Good Samaritan Society	Barnesville GSC	Barnesville	MN	SNF
1	Evangelical Lutheran Good Samaritan Society	New Town GSC	New Town	ND	ALF
1	Evangelical Lutheran Good Samaritan Society	Rock View GSC	Parshall	ND	SNF
11	Presbyterian Senior Living	The Long Home	Lancaster	PA	ALF
18	Front Porch	The Alhambra	Alhambra	CA	ALF
31	Springpoint Senior Living	Haddonfield Home	Haddonfield	NJ	ALF
31	Springpoint Senior Living	Watchung Ridge	Watchung	NJ	ALF
31	Springpoint Senior Living	Stony Brook	Pennington	NJ	ALF
31	Springpoint Senior Living	Waterford Glen	Wall	NJ	ALF
63	Sears Methodist Retirement System	Windcrest Alzheimers Care Center	Abilene	TX	SNF
63	Sears Methodist Retirement System	Wesley Woods Alzheimer's Care Center	Waco	TX	SNF
67	United Methodist Homes	Doris L. Patrick Retirement Center	Norwich	NY	SNF
73	VMP	Greenville Manor	Greenville	WI	ALF
77	Presby's Inspired Life	The 58th Street Presbyterian Home	Philadelphia	PA	SNF

## 5-13 Growth: Dispositions

### Growth: Dispositions

#### 5-13c 2011 LOCATIONS



## Chapter 6

### Additional Listings

Three additional listings have been added to LZ 100 since its inaugural publication: single-campus senior living, affordable housing providers, and multi-site senior living that includes affordable housing units. While some of the organizations on these lists may also appear in LZ 100, these lists are composed of LeadingAge members that fit within these specific categories. Like the rest of the LZ 100, these are quantitative, not qualitative, listings. All organizations marked with an asterisk throughout Chapter 6 did not submit an LZ 100 response.

#### Single-Campus Senior Living Communities

A single-campus senior living community offers care at one location, or campus (Chart 6-1a). The single-campus communities are ranked by number of units. Single-campus communities may be part of a multi-site organization or may stand alone (that is, they are not part of a multi-site senior living organization [those that stand alone are listed in Chart 6-1b]). A number of these stand-alone single-campus communities are poised for growth from a single- to multi-site organization and may ultimately appear in the LZ 100 multi-site senior living organization listing.

#### Affordable (non market-rate) Housing Providers

Using the LeadingAge Directory of Members and LeadingAge contact information, systems providing affordable (non market-rate) and government-subsidized housing were researched and ranked according to the number of affordable housing units offered. This listing includes a number of organizations that are not on the LZ 100 multi-site senior living organization listing (Chart 6-2).

## Systems by Total Market-Rate and Affordable Units

Chart 6-3 presents an aggregate ranking of unit types, market rate and affordable. This type of ranking better reflects the size and scope of each organization that provides residential options for seniors of varying income levels. For example, National Church Residences is ranked as LZ 100 #38 (**Primary Ranking**) with 1,542 total market-rate units; the organization is ranked #1 among this year's listing of affordable housing providers with 16,143 total affordable units (Chart 4-15a, Chart 6-2); by aggregating these two categories of seniors housing, the organization is the second largest among the LZ 100 with 17,685 total units. Additionally, eleven other systems that do not appear in the LZ 100 **Primary Ranking** are among the largest 100 systems when total units are aggregated.

## 6-1 2012 LeadingAge Ziegler 100

### Additional Listings: Single-Campus Senior Living Communities

#### 6-1a THE NATION'S LARGEST NOT-FOR-PROFIT SENIOR LIVING COMMUNITIES

2012 Rank	2011 Rank	Campus	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/11)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Campuses	Silver Spring	MD	2,268	1,947	207	114	85.8%	9.1%	5.0%
2	3	John Knox Village		Lee's Summit	MO	1,873	1,302	141	430	69.5%	7.5%	23.0%
3	2	Oak Crest Village	National Senior Campuses	Parkville	MD	1,858	1,525	133	200	82.1%	7.2%	10.8%
4	4	Charlestown		Catonsville	MD	1,783	1,450	127	206	81.3%	7.1%	11.6%
5	5	Cedar Crest Village	National Senior Campuses	Pequannock	NJ	1,696	1,501	82	113	88.5%	4.8%	6.7%
6	6	Greenspring Village	National Senior Campuses	Springfield	VA	1,685	1,405	144	136	83.4%	8.5%	8.1%
7	7	Shell Point Village	CMA	Fort Myers	FL	1,671	1,221	252	198	73.1%	15.1%	11.8%
8	8	Ann's Choice	National Senior Campuses	Philadelphia	PA	1,619	1,487	66	66	91.8%	4.1%	4.1%
9	9	Brooksby Village	National Senior Campuses	Peabody	MA	1,542	1,344	94	104	87.2%	6.1%	6.7%
10	10	Masonic Village at Elizabethtown	Masonic Villages	Elizabethtown	PA	1,503	925	125	453	61.5%	8.3%	30.1%
11	11	Seabrook Village	National Senior Campuses	Tinton Falls	NJ	1,266	1,088	92	86	85.9%	7.3%	6.8%
12	12	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,199	809	133	257	67.5%	11.1%	21.4%
13	13	Linden Ponds	National Senior Campuses	Hingham	MA	1,120	988	0	132	88.2%	0.0%	11.8%
14	14	Maris Grove	National Senior Campuses	Glen Mills	PA	1,089	957	66	66	87.9%	6.1%	6.1%
15	15	Henry Ford Village		Dearborn	MI	1,040	855	96	89	82.2%	9.2%	8.6%
16	17	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	1,006	659	99	248	65.5%	9.8%	24.7%
17	18	Hebrew Home at Riverdale*		Bronx	NY	1,004	134	0	870	13.3%	0.0%	86.7%
18	16	Panorama City		Lacey	WA	1,001	806	40	155	80.5%	4.0%	15.5%
19	19	John Knox Village of Florida		Pompano Beach	FL	972	733	62	177	75.4%	6.4%	18.2%
20	20	Willow Valley Lakes Manor	Willow Valley Retirement Communities	Lancaster	PA	955	732	146	77	76.6%	15.3%	8.1%
21	21	Fox Run Village	National Senior Campuses	Novi	MI	883	751	44	88	85.1%	5.0%	10.0%
22	22	Franklin United Methodist Community		Franklin	IN	863	196	459	208	22.7%	53.2%	24.1%
23	23	Westminster-Canterbury Richmond		Richmond	VA	851	526	167	158	61.8%	19.6%	18.6%
24	24	Cross Keys Village - The Brethren Home Community		New Oxford	PA	814	449	95	270	55.2%	11.7%	33.2%
25	25	St. John's Home & Meadows*		Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%

## 6-1 2012 LeadingAge Ziegler 100

### Additional Listings: Single-Campus Senior Living Communities

#### 6-1a THE NATION'S LARGEST NOT-FOR-PROFIT SENIOR LIVING COMMUNITIES

2012 Rank	2011 Rank	Campus	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/11)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	26	Friendship Village of Tempe		Tempe	AZ	808	575	91	142	71.2%	11.3%	17.6%
27	27	Menorah Park Center for Senior Living		Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
28	28	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	789	605	80	104	76.7%	10.1%	13.2%
29	29	Greencroft Goshen	Greencroft, Inc.	Goshen	IN	780	411	129	240	52.7%	16.5%	30.8%
30	30	Lakeview Village		Lenexa	KS	775	580	23	172	74.8%	3.0%	22.2%
31	31	Brethren Village Retirement Community		Lancaster	PA	774	513	141	120	66.3%	18.2%	15.5%
32	32	Charles E. Smith Life Communities		Rockville	MD	767	151	60	556	19.7%	7.8%	72.5%
33	35	Mennonite Home Communities		Lancaster	PA	766	421	155	190	55.0%	20.2%	24.8%
34	33	Luther Manor - Wauwatosa Campus	Luther Manor	Wauwatosa	WI	762	381	158	223	50.0%	20.7%	29.3%
35	34	Heritage Pointe	United Methodist Memorial Home	Warren	IN	760	152	409	199	20.0%	53.8%	26.2%
36	36	Otterbein Lebanon Retirement Community	Otterbein Retirement Communities	Lebanon	OH	718	414	48	256	57.7%	6.7%	35.7%
37	37	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	715	330	249	136	46.2%	34.8%	19.0%
38	38	Willow Valley Manor North	Willow Valley Retirement Communities	Lancaster	PA	711	472	107	132	66.4%	15.0%	18.6%
39	39	St. Ann's Community	St. Ann's Community	Rochester	NY	711	120	0	591	16.9%	0.0%	83.1%
40	40	Garden Spot Village	Garden Spot Village	New Holland	PA	701	542	86	73	77.3%	12.3%	10.4%
41	41	Bethany Lutheran Village*	Graceworks Lutheran Services	Dayton	OH	700	386	62	252	55.1%	8.9%	36.0%
42	43	Western Home Communities - Main Campus	Western Home Communities	Cedar Falls	IA	693	363	230	100	52.4%	33.2%	14.4%
43	44	Glencroft Retirement Community		Glendale	AZ	680	380	75	225	55.9%	11.0%	33.1%
44	42	Atlantic Shores*		Virginia Beach	VA	672	555	67	50	82.6%	10.0%	7.4%
45	45	Raybrook Manor	Holland Home	Grand Rapids	MI	665	299	265	101	45.0%	39.8%	15.2%
46	46	Miami Jewish Health Systems*		Miami	FL	656	102	92	462	15.5%	14.0%	70.4%
47	50	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	655	304	131	220	46.4%	20.0%	33.6%
48	47	The Beatitudes Campus		Phoenix	AZ	648	458	121	69	70.7%	18.7%	10.6%
49	48	Copeland Oaks		Sebring	OH	645	375	72	198	58.1%	11.2%	30.7%
50	51	The Village in Gainesville <sup>D</sup>	SantaFe Senior Living	Gainesville	FL	641	510	131	0	79.6%	20.4%	0.0%

## 6-1 2012 LeadingAge Ziegler 100

### Additional Listings: Single-Campus Senior Living Communities

#### 6-1a THE NATION'S LARGEST NOT-FOR-PROFIT SENIOR LIVING COMMUNITIES

2012 Rank	2011 Rank	Campus	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/11)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	52	Indiana Masonic Home*		Franklin	IN	639	122	317	200	19.1%	49.6%	31.3%
52	57	La Posada at Park Centre		Green Valley	AZ	635	466	111	58	73.4%	17.5%	9.1%
53	53	Westminster-Canterbury on Chesapeake Bay		Virginia Beach	VA	629	439	95	95	69.8%	15.1%	15.1%
54	54	Kissimmee Good Samaritan Retirement Village	Evangelical Lutheran Good Samaritan Society	Kissimmee	FL	626	423	33	170	67.6%	5.3%	27.2%
55	49	John Knox Village of Tampa Bay	St. Joseph's Health System	Tampa	FL	622	304	155	163	48.9%	24.9%	26.2%
56	60	Landis Homes		Lancaster	PA	620	420	97	103	67.7%	15.6%	16.6%
57	56	Messiah Village	Messiah Village	Mechanicsburg	PA	620	278	158	184	44.8%	25.5%	29.7%
58	58	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
59	61	Air Force Village West*		Riverside	CA	591	440	92	59	74.5%	15.6%	10.0%
60	62	Springmoor Life Care Retirement Community		Raleigh	NC	589	398	18	173	67.6%	3.1%	29.4%
61	63	The Army Residence Community		San Antonio	TX	587	418	78	91	71.2%	13.3%	15.5%
62	64	Oakwood Village West Campus	Oakwood Village	Madison	WI	582	387	100	95	66.5%	17.2%	16.3%
63	67	St. Camillus*		Wauwatosa	WI	578	289	90	199	50.0%	15.6%	34.4%
64	70	The Philadelphia Protestant Home*		Philadelphia	PA	576	275	175	126	47.7%	30.4%	21.9%
65	66	Windcrest Village <sup>D</sup>	National Senior Campuses	Highlands Ranch	CO	575	575	0	0	100.0%	0.0%	0.0%
66	59	Good Samaritan Village of Hastings	Evangelical Lutheran Good Samaritan Society	Hastings	NE	575	320	51	204	55.7%	8.9%	35.5%
67	68	Medford Leas*		Medford	NJ	573	447	58	68	78.0%	10.1%	11.9%
68	69	Bristol Village	National Church Residences	Waverly	OH	571	465	31	75	81.4%	5.4%	13.1%
69	71	Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
70	73	Havenwood - Heritage Heights		Concord	NH	558	408	55	95	73.1%	9.9%	17.0%
71	75	Carolina Meadows		Chapel Hill	NC	558	389	79	90	69.7%	14.2%	16.1%
72	76	Twin Lakes Community		Burlington	NC	558	386	52	120	69.2%	9.3%	21.5%
73	78	Royal Oaks		Sun City	AZ	557	373	59	125	67.0%	10.6%	22.4%
74	77	Presbyterian Village North	Presbyterian Communities & Services	Dallas	TX	556	250	75	231	45.0%	13.5%	41.5%
75	79	Ashlar Village <sup>D</sup>	Masonicare	Wallingford	CT	553	362	191	0	65.5%	34.5%	0.0%



## 6-1 2012 LeadingAge Ziegler 100

### Additional Listings: Single-Campus Senior Living Communities

#### 6-1a THE NATION'S LARGEST NOT-FOR-PROFIT SENIOR LIVING COMMUNITIES

2012 Rank	2011 Rank	Campus	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/11)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	80	Passavant Retirement Community	Lutheran SeniorLife	Zelenople	PA	552	226	168	158	40.9%	30.4%	28.6%
77	72	Carroll Lutheran Village		Westminster	MD	551	398	50	103	72.2%	9.1%	18.7%
78	74	Westminster Place	Presbyterian Homes	Evanston	IL	550	256	103	191	46.5%	18.7%	34.7%
79	81	Mayflower Gardens	Retirement Housing Foundation	Lancaster	CA	548	494	6	48	90.1%	1.1%	8.8%
80	82	Croasdale	United Methodist Retirement Homes	Durham	NC	546	402	30	114	73.6%	5.5%	20.9%
81	83	Casa de las Campanas*		San Diego	CA	545	380	66	99	69.7%	12.1%	18.2%
82	85	Rolling Green Village		Greenville	SC	539	421	74	44	78.1%	13.7%	8.2%
83	86	Phoebe Home	Phoebe Ministries	Allentown	PA	538	88	55	395	16.4%	10.2%	73.4%
84	84	Moorings Park		Naples	FL	536	357	73	106	66.6%	13.6%	19.8%
85	**NR	Masonic Care Community of New York*		Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
86	**NR	Westminster Oaks	Westminster Communities of Florida	Tallahassee	FL	534	327	87	120	61.2%	16.3%	22.5%
87	**NR	Mission Ridge & St. John's Lutheran Home	St. John's Lutheran Ministries	Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
88	95	St. Joseph of the Pines	Catholic Health East	Southern Pines	NC	532	303	62	167	57.0%	11.7%	31.4%
89	89	St. Leonard	Sylvania Franciscan Health	Centerville	OH	530	250	160	120	47.2%	30.2%	22.6%
90	97	Windsor Park Manor	Covenant Retirement Communities	Carol Stream	IL	529	362	90	77	68.4%	17.0%	14.6%
91	93	Maple Knoll	Maple Knoll Communities	Springdale	OH	528	279	63	186	52.8%	11.9%	35.2%
92	88	Air Force Village I	Air Force Village	San Antonio	TX	526	383	39	104	72.8%	7.4%	19.8%
93	94	Cristwood Retirement Community	CRISTA	Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%
94	92	Luther Acres Retirement Community	LutherCare	Lititz	PA	523	347	70	106	66.3%	13.4%	20.3%
95	98	The Mennonite Village		Albany	OR	523	298	130	95	57.0%	24.9%	18.2%
96	**NR	Pine Run Community*	Doylestown Hospital	Doylestown	PA	521	288	159	74	55.3%	30.5%	14.2%
97	91	Givens Estates		Asheville	NC	519	388	61	70	74.8%	11.8%	13.5%
98	100	Bridgewater Retirement Community*		Bridgewater	VA	519	246	134	139	47.4%	25.8%	26.8%
99	**NR	Boutwells Landing	Presbyterian Homes and Services	Oak Park Heights	MN	518	315	95	108	60.8%	18.3%	20.8%
100	96	Air Force Village II	Air Force Village	San Antonio	TX	516	401	51	64	77.7%	9.9%	12.4%

<sup>D</sup> Development of nursing care imminent

\* No 2012 response provided

\*\* NR: Not Ranked in that year

## 6-1 2012 LeadingAge Ziegler 100

### Additional Listings: Single-Campus Senior Living Communities

#### 6-1b THE NATION'S LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING ORGANIZATIONS

2012 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/11)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	John Knox Village	Lee's Summit	MO	1,873	1,302	141	430	69.5%	7.5%	23.0%
2	Charlestown	Catonsville	MD	1,783	1,450	127	206	81.3%	7.1%	11.6%
3	Henry Ford Village	Dearborn	MI	1,040	855	96	89	82.2%	9.2%	8.6%
4	Hebrew Home at Riverdale*	Bronx	NY	1,004	134	0	870	13.3%	0.0%	86.7%
5	Panorama City	Lacey	WA	1001	806	40	155	80.5%	4.0%	15.5%
6	John Knox Village of Florida	Pompano Beach	FL	972	733	62	177	75.4%	6.4%	18.2%
7	Franklin United Methodist Community	Franklin	IN	863	196	459	208	22.7%	53.2%	24.1%
8	Westminster-Canterbury Richmond	Richmond	VA	851	526	167	158	61.8%	19.6%	18.6%
9	Cross Keys Village - The Brethren Home Community	New Oxford	PA	814	449	95	270	55.2%	11.7%	33.2%
10	St. John's Home & Meadows*	Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
11	Friendship Village of Tempe	Tempe	AZ	808	575	91	142	71.2%	11.3%	17.6%
12	Menorah Park Center for Senior Living	Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
13	Lakeview Village	Lenexa	KS	775	580	23	172	74.8%	3.0%	22.2%
14	Brethren Village Retirement Community	Lancaster	PA	774	513	141	120	66.3%	18.2%	15.5%
15	Charles E. Smith Life Communities	Rockville	MD	767	151	60	556	19.7%	7.8%	72.5%
16	Mennonite Home Communities	Lancaster	PA	766	421	155	190	55.0%	20.2%	24.8%
17	Bethany Lutheran Village*	Dayton	OH	700	386	62	252	55.1%	8.9%	36.0%
18	Glencroft Retirement Community	Glendale	AZ	680	380	75	225	55.9%	11.0%	33.1%
19	Atlantic Shores*	Virginia Beach	VA	672	555	67	50	82.6%	10.0%	7.4%
20	Miami Jewish Health Systems*	Miami	FL	656	102	92	462	15.5%	14.0%	70.4%
21	The Beatitudes Campus	Phoenix	AZ	648	458	121	69	70.7%	18.7%	10.6%
22	Copeland Oaks	Sebring	OH	645	375	72	198	58.1%	11.2%	30.7%
23	Indiana Masonic Home*	Franklin	IN	639	122	317	200	19.1%	49.6%	31.3%
24	La Posada at Park Centre	Green Valley	AZ	635	466	111	58	73.4%	17.5%	9.1%
25	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	629	439	95	95	69.8%	15.1%	15.1%

## 6-1 2012 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

### 6-1b THE NATION'S LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING ORGANIZATIONS

2012 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/11)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	Landis Homes	Lancaster	PA	620	420	97	103	67.7%	15.6%	16.6%
27	Air Force Village West*	Riverside	CA	591	440	92	59	74.5%	15.6%	10.0%
28	Springmoor Life Care Retirement Community	Raleigh	NC	589	398	18	173	67.6%	3.1%	29.4%
29	The Army Residence Community	San Antonio	TX	587	418	78	91	71.2%	13.3%	15.5%
30	St. Camillus*	Wauwatosa	WI	578	289	90	199	50.0%	15.6%	34.4%
31	The Philadelphia Protestant Home*	Philadelphia	PA	576	275	175	126	47.7%	30.4%	21.9%
32	Medford Leas*	Medford	NJ	573	447	58	68	78.0%	10.1%	11.9%
33	Havenwood - Heritage Heights	Concord	NH	558	408	55	95	73.1%	9.9%	17.0%
34	Carolina Meadows	Chapel Hill	NC	558	389	79	90	69.7%	14.2%	16.1%
35	Twin Lakes Community	Burlington	NC	558	386	52	120	69.2%	9.3%	21.5%
36	Royal Oaks	Sun City	AZ	557	373	59	125	67.0%	10.6%	22.4%
37	Carroll Lutheran Village	Westminster	MD	551	398	50	103	72.2%	9.1%	18.7%
38	Casa de las Campanas*	San Diego	CA	545	380	66	99	69.7%	12.1%	18.2%
39	Rolling Green Village	Greenville	SC	539	421	74	44	78.1%	13.7%	8.2%
40	Moorings Park	Naples	FL	536	357	73	106	66.6%	13.6%	19.8%
41	Masonic Care Community of New York*	Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
42	The Mennonite Village	Albany	OR	523	298	130	95	57.0%	24.9%	18.2%
43	Givens Estates	Asheville	NC	519	388	61	70	74.8%	11.8%	13.5%
44	Bridgewater Retirement Community*	Bridgewater	VA	519	246	134	139	47.4%	25.8%	26.8%
45	The Lutheran Home	Cape Girardeau	MO	515	137	104	274	26.6%	20.2%	53.2%
46	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
47	Friendship Village Sunset Hills	St. Louis	MO	507	328	61	118	64.7%	12.0%	23.3%
48	Fleet Landing	Atlantic Beach	FL	506	354	72	80	70.0%	14.2%	15.8%
49	St. Mark Village*	Palm Harbor	FL	503	292	151	60	58.1%	30.0%	11.9%
50	Riddle Village	Media	PA	500	365	49	86	73.0%	9.8%	17.2%

## 6-1 2012 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

### 6-1b THE NATION'S LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING ORGANIZATIONS

2012 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/11)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	Lebanon Valley Brethren Home	Palmyra	PA	495	337	58	100	68.1%	11.7%	20.2%
52	Marquette Manor	Indianapolis	IN	494	315	77	102	63.8%	15.6%	20.6%
53	C. C. Young	Dallas	TX	494	239	121	134	48.4%	24.5%	27.1%
54	The Estates at Carpenters	Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%
55	Warm Hearth Village	Blacksburg	VA	492	282	150	60	57.3%	30.5%	12.2%
56	Horizon House	Seattle	WA	482	392	90	0	81.3%	18.7%	0.0%
57	White Horse Village	Newtown Square	PA	475	348	68	59	73.3%	14.3%	12.4%
58	Deerfield Episcopal Retirement Community*	Asheville	NC	473	351	60	62	74.2%	12.7%	13.1%
59	Cypress Cove at Healthpark Florida*	Fort Meyers	FL	470	362	44	64	77.0%	9.4%	13.6%
60	Friendship Village	Waterloo	IA	470	353	50	67	75.1%	10.6%	14.3%
61	Virginia Mennonite Retirement Community (VMRC)	Harrisonburg	VA	470	264	86	120	56.2%	18.3%	25.5%
62	Carolina Village*	Hendersonville	NC	465	347	60	58	74.6%	12.9%	12.5%
63	Masonic Pathways	Alma	MI	463	38	221	204	8.2%	47.7%	44.1%
64	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
65	Paradise Valley Estates	Fairfield	CA	455	327	68	60	71.9%	14.9%	13.2%
66	Greenwood Village South*	Greenwood	IN	451	266	48	137	59.0%	10.6%	30.4%
67	Aldersgate	Charlotte	NC	448	256	92	100	57.1%	20.5%	22.3%
68	Falcons Landing	Potomac Falls	VA	447	316	71	60	70.7%	15.9%	13.4%
69	Lutheran Social Services of Upstate New York*	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
70	Cornwall Manor	Cornwall	PA	444	306	30	108	68.9%	6.8%	24.3%
71	Aldersgate Village*	Topeka	KS	444	175	60	209	39.4%	13.5%	47.1%
72	Christian Health Care Center	Wyckoff	NJ	442	55	95	292	12.4%	21.5%	66.1%
73	Cathedral Village	Philadelphia	PA	441	293	0	148	66.4%	0.0%	33.6%
74	Skaalen Retirement Services*	Stoughton	WI	437	229	50	158	52.4%	11.4%	36.2%
75	Mt. San Antonio Gardens	Pomona	CA	431	296	71	64	68.7%	16.5%	14.8%

## 6-1 2012 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

### 6-1b THE NATION'S LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING ORGANIZATIONS

2012 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/11)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	Williamsburg Landing	Williamsburg	VA	427	308	61	58	72.1%	14.3%	13.6%
77	Laurel Lake Retirement Community	Hudson	OH	426	292	59	75	68.5%	13.8%	17.6%
78	Forum at Rancho San Antonio	Cupertino	CA	425	319	58	48	75.1%	13.6%	11.3%
79	O'Connor Woods*	Stockton	CA	422	245	77	100	58.1%	18.2%	23.7%
80	Mease Manor*	Dunedin	FL	422	216	106	100	51.2%	25.1%	23.7%
81	Carillon	Lubbock	TX	418	255	43	120	61.0%	10.3%	28.7%
82	Marquardt Village	Watertown	WI	418	230	48	140	55.0%	11.5%	33.5%
83	The Good Samaritan Home of Quincy	Quincy	IL	417	160	26	231	38.4%	6.2%	55.4%
84	Meadowood	Worcester	PA	415	300	56	59	72.3%	13.5%	14.2%
85	Westminster Canterbury of Lynchburg	Lynchburg	VA	413	245	63	105	59.3%	15.3%	25.4%
86	Emerald Heights	Redmond	WA	407	290	56	61	71.3%	13.8%	15.0%
87	Tel Hai Retirement Community	Honey Brook	PA	407	178	90	139	43.7%	22.1%	34.2%
88	Bay Village of Sarasota	Sarasota	FL	406	289	22	95	71.2%	5.4%	23.4%
89	Friendship Haven	Fort Dodge	IA	406	203	48	155	50.0%	11.8%	38.2%
90	Carol Woods Retirement Community*	Chapel Hill	NC	405	292	83	30	72.1%	20.5%	7.4%
91	La Vida Llana	Albuquerque	NM	405	272	83	50	67.2%	20.5%	12.3%
92	Dunwoody Village	Newtown Square	PA	405	243	81	81	60.0%	20.0%	20.0%
93	Friendship Village Chesterfield	Chesterfield	MO	404	283	22	99	70.0%	5.4%	24.5%
94	Penney Retirement Community	Penney Farms	FL	401	286	75	40	71.3%	18.7%	10.0%
95	Pennswood Village	Newtown	PA	400	310	37	53	77.5%	9.3%	13.3%
96	Willamette View	Portland	OR	400	279	115	6	69.8%	28.8%	1.5%
97	Franciscan Oaks*	Denville	NJ	398	285	34	79	71.6%	8.5%	19.8%
98	St. Paul Homes	Greenville	PA	396	84	120	192	21.2%	30.3%	48.5%
99	Kahala Nui	Honolulu	HI	393	270	63	60	68.7%	16.0%	15.3%
100	Fellowship Village	Basking Ridge	NJ	392	257	81	54	65.6%	20.7%	13.8%

\* No 2012 response provided

## 6-2 2012 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

### THE NATION'S LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2012 Rank	2011 Rank	System Name	State	Units	Communities <sup>A</sup>
1	1	National Church Residences	OH	16,143	226
2	2	Retirement Housing Foundation	CA	10,092	115
3	3	Volunteers of America	VA	9,834	160
4	40	Mercy Housing	CO	5,368	79
5	5	Christian Church Homes of Northern California	CA	5,354	64
6	x	Senior Housing Assistance Group	WA	4,163	26
7	6	Elderly Housing Development and Operations Corporation	FL	4,138	50
8	7	TELACU Residential Management*	CA	2,625	35
9	8	Catholic Housing Management*	FL	2,246	14
10	23	New Samaritan Corporation*	CT	2,208	46
11	9	CARING Housing Ministries	CA	2,127	9
12	10	United Church Homes	OH	2,070	49
13	11	Westminster Communities of Florida	FL	2,032	10
14	13	Christopher Homes	LA	1,860	13
15	12	Community Housing Management Services*	CA	1,807	16
16	17	Springpoint Senior Living	NJ	1,712	17
17	14	Cornerstone Affiliates	CA	1,701	22
18	15	Salvation Army Silvercrest Management of California	CA	1,678	19
19	16	be.group	CA	1,657	25
20	18	Catholic Charities - Archdiocese of Baltimore	MD	1,611	21
21	19	Satellite Housing	CA	1,586	23
22	20	Oklahoma City Housing Authority	OK	1,386	10
23	21	Catholic Charities of Chicago	IL	1,372	18
24	22	Presbyterian Villages of Michigan	MI	1,326	17
25	24	Evangelical Lutheran Good Samaritan Society	SD	1,203	28

## 6-2 2012 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

### THE NATION'S LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2012 Rank	2011 Rank	System Name	State	Units	Communities <sup>Δ</sup>
26	30	Jewish Community Housing for the Elderly	MA	1,200	7
27	25	Lutheran Social Services of Illinois	IL	1,166	15
28	29	Victory Housing	MD	1,144	13
29	26	Presby's Inspired Life	PA	1,133	13
30	27	Pacific Retirement Services, Inc.	OR	1,105	24
31	28	Wesley Senior Ministries*	TN	1,088	16
32	31	Presbyterian SeniorCare	PA	970	22
33	32	LSC Service Corporation	OH	916	5
34	34	Union Labor Retirement Association	OR	884	6
35	35	Lutheran Social Services of Central Ohio	OH	880	19
36	33	Wesley Woods Senior Living	GA	874	4
37	36	Selfhelp Community Services	NY	864	5
38	37	Hebrew SeniorLife	MA	766	2
39	38	Christian Care Communities	KY	743	10
40	39	Avesta Housing*	ME	742	34
41	41	DePaul Housing Management Corporation	NY	716	14
42	42	Episcopal Senior Communities	CA	676	4
43	43	Christian Concern Management and Development Corporation*	PA	655	7
44	44	Lutheran Homes Society/ Lutheran Housing Services*	OH	649	11
45	45	Aging True <sup>1</sup>	FL	637	4
46	46	St. Andrew's Resources for Seniors (STARS)*	MO	604	13
47	47	Northern California Presbyterian Homes and Services	CA	600	3
48	48	Jewish Senior Life of Metropolitan Detroit*	MI	538	0
49	49	Ecumen	MN	501	4
50	50	Lutheran Social Ministries of New Jersey	NJ	498	7

## 6-2 2012 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

### THE NATION'S LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2012 Rank	2011 Rank	System Name	State	Units	Communities <sup>Δ</sup>
51	51	Lesley Senior Communities*	CA	484	4
52	52	Jewish Home Lifecare	NY	482	5
53	53	Presbyterian Homes of Georgia*	GA	465	2
54	54	CJE SeniorLife	IL	455	6
55	61	Presbyterian Senior Living	PA	414	6
56	58	Lutheran Senior Services	MO	392	6
57	55	The Lutheran Care Network* <sup>2</sup>	NY	371	5
58	56	Jewish Community Housing Corporation	NJ	369	3
59	57	Bethany Community Services	MA	364	3
60	59	Phoebe Ministries	PA	356	8
61	60	Greencroft	IN	352	2
62	62	Lutheran Social Services of Michigan	MI	338	5
63	63	Goodwill Industries Suncoast	FL	335	5
64	64	Diakon Lutheran Social Ministries	PA	335	3
65	65	Lincoln Lutheran*	WI	335	2
66	66	Family Housing Management Company	FL	326	4
67	67	Spokane Baptist Association Homes*	WA	321	2
68	68	Methodist Retirement Communities, The Woodlands	TX	319	1
69	69	Episcopal Retirement Homes Inc. - Cincinnati	OH	318	3
70	**NR	Mississippi Methodist Senior Services	MS	313	0
71	70	United Methodist Homes of New Jersey	NJ	300	5
72	71	Plano Community Home, Inc.*	TX	296	5
73	72	Presbyterian Homes and Services	MN	293	3
74	73	The National Caucus and Center on Black Aged*	MD	278	3
75	74	Elderly Housing Management Corporation*	FL	272	2



## 6-2 2012 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

### THE NATION'S LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2012 Rank	2011 Rank	System Name	State	Units	Communities <sup>Δ</sup>
76	75	Porter Hills Retirement Communities & Services	MI	270	6
77	76	Santa Clara Methodist Retirement Foundation*	CA	257	2
78	77	Christian Care Companies	AZ	247	1
79	78	Maple Knoll Communities	OH	244	2
80	79	Sholom Community Alliance*	MN	240	3
81	80	Lutheran Homes of Oshkosh	WI	219	3
82	81	Older American Housing in Spotswood*	NJ	200	2
83	82	BHI Senior Living*	IN	198	0
84	83	Saint Elizabeth Community*	RI	197	1
85	84	Lutheran Social Services Group*	NY	196	6
86	85	Augustana Care Corporation	MN	188	0
87	86	Evangelical Homes of Michigan	MI	178	3
88	87	Jewish Senior Housing & Healthcare*	NJ	178	2
89	88	Guardian Angels of Elk River*	MN	177	5
90	89	Milton Residences for the Elderly*	MA	167	0
91	90	Moravian Care Ministries*	MN	167	0
93	**NR	Wesley Enhanced Living	PA	162	3
92	91	Eaton Senior Programs (ESP)	CO	162	1
94	**NR	Lutheran Homes of Michigan	MI	161	0
95	92	United Church Homes & Services	NC	150	5
96	93	Ohio Presbyterian Retirement Services	OH	150	0
97	94	Sears Methodist Retirement System, Inc.	TX	149	2
98	95	Asbury Communities	MD	149	1
99	96	Presbyterian Homes & Services	NY	148	0
100	98	Walker Methodist	MN	139	3

<sup>Δ</sup> The count of communities only includes free-standing affordable housing communities. Communities that contain a majority of other types of housing were not included in the count.

\* No 2012 response provided

\*\* NR: Not Ranked in that year

<sup>1</sup> Previously known as The Cathedral Foundation

<sup>2</sup> Previously known as Wartburg Lutheran Services

## 6-3 2012 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

### 6-3 RANKED BY TOTAL MARKET-RATE AND AFFORDABLE SENIOR LIVING UNITS

Rank	2012 LZ 100 Rank	System Name	State	Units (as of 12/31/11)				
				Total	ILU	ALU	NCB	AFF
1	1	Evangelical Lutheran Good Samaritan Society	SD	20,137	5,004	2,135	11,795	1,203
2	38	National Church Residences	OH	17,685	706	373	463	16,143
3	2	National Senior Campuses	MD	17,197	15,164	928	1,105	0
4	6	Retirement Housing Foundation	CA	14,381	2,639	1,000	650	10,092
5	21	Volunteers of America	VA	12,327	394	593	1,506	9,834
6	3	ACTS Retirement-Life Communities, Inc.	PA	8,130	5,799	885	1,446	0
7	4	Presbyterian Homes and Services	MN	6,635	3,192	1,773	1,377	293
8	8	Westminster Communities of Florida	FL	5,241	1,994	464	751	2,032
9	5	Covenant Retirement Communities	IL	4,711	3,107	724	880	0
10	12	Cornerstone Affiliates	CA	4,677	1,761	497	718	1,701
11	7	Lifespace Communities, Inc.	IA	4,102	3,117	160	825	0
12	13	Pacific Retirement Services, Inc.	OR	3,983	2,141	307	430	1,105
13	9	Lutheran Senior Services	MO	3,595	1,579	717	907	392
14	11	Presbyterian Senior Living	PA	3,533	1,368	499	1,252	414
15	31	Springpoint Senior Living	NJ	3,403	1,245	179	267	1,712
16	32	be.group	CA	3,272	954	429	232	1,657
17	10	The Kendal Corporation	PA	3,132	2,264	381	487	0
18	17	Ecumen	MN	3,110	286	1,517	806	501
19	75	United Church Homes	OH	3,062	158	160	674	2,070
20	14	Ohio Presbyterian Retirement Services	OH	2,955	1,540	507	758	150
21	15	Asbury Communities	MD	2,905	1,924	334	498	149
22	19	Diakon Lutheran Social Ministries	PA	2,841	908	622	976	335
23	16	Christian Homes, Inc.	IL	2,728	677	280	1,750	21
24	18	Front Porch	CA	2,651	1,570	442	539	100
25	22	Franciscan Communities	IL	2,546	1,080	485	842	139

## 6-3 2012 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

### 6-3 RANKED BY TOTAL MARKET-RATE AND AFFORDABLE SENIOR LIVING UNITS

Rank	2012 LZ 100 Rank	System Name	State	Units (as of 12/31/11)				
				Total	ILU	ALU	NCB	AFF
26	20	Presbyterian Manors of Mid-America	KS	2,493	886	557	1,050	0
27	68	Presbyterian Villages of Michigan	MI	2,369	564	301	178	1,326
28	34	Hebrew SeniorLife	MA	2,359	660	119	814	766
29	23	Masonic Villages	PA	2,306	1,377	260	669	0
30	40	Episcopal Senior Communities	CA	2,181	1,033	96	376	676
31	26	Augustana Care Corporation	MN	2,139	135	998	818	188
32	77	Presby's Inspired Life	PA	2,092	477	222	260	1,133
33	25	Providence Life Services	IL	2,060	808	472	699	81
34	66	Presbyterian SeniorCare	PA	2,035	359	285	421	970
35	28	Christian Care Companies	AZ	2,034	1,434	285	68	247
36	24	Willow Valley Retirement Communities	PA	2,023	1,501	253	269	0
37	27	Shell Point	FL	1,937	1,337	272	328	0
38	44	Greencroft	IN	1,801	528	388	533	352
39	29	Elim Care	MN	1,767	264	440	1,015	48
40	33	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,735	259	628	714	134
41	47	Mississippi Methodist Senior Services	MS	1,703	805	265	320	313
42	30	Otterbein Senior Lifestyle Choices	OH	1,692	716	327	649	0
43	65	Northern California Presbyterian Homes and Services	CA	1,685	840	104	141	600
44	**NR	Lutheran Social Services of Illinois	IL	1,622	159	87	210	1,166
45	35	Homewood Retirement Centers	MD	1,590	866	273	451	0
46	37	Eskaton	CA	1,589	515	608	426	40
47	36	Senior Quality Lifestyles Corporation	TX	1,587	989	337	261	0
48	43	Presbyterian Homes	IL	1,584	862	231	382	109
49	57	Phoebe Ministries	PA	1,571	406	146	663	356
50	97	Christian Care Communities	KY	1,544	185	103	513	743

## 6-3 2012 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

### 6-3 RANKED BY TOTAL MARKET-RATE AND AFFORDABLE SENIOR LIVING UNITS

Rank	2012 LZ 100 Rank	System Name	State	Units (as of 12/31/11)				
				Total	ILU	ALU	NCB	AFF
51	39	Bethesda Health Group, Inc.	MO	1,522	627	34	861	0
52	45	Catholic Health Care Services of the Archdiocese of Philadelphia*	PA	1,485	723	501	261	0
53	41	Holland Home	MI	1,485	60	135	1,215	75
54	42	Buckner Retirement Services, Inc.	TX	1,481	884	315	282	0
55	**NR	Lutheran Homes Society*	OH	1,419	217	159	394	649
56	46	Concordia Lutheran Ministries	PA	1,400	453	705	242	0
57	48	WesleyLife	IA	1,330	695	261	374	0
58	71	United Methodist Homes of New Jersey	NJ	1,328	88	688	252	300
59	51	Lutheran Services for the Aging	NC	1,320	257	281	732	50
60	59	American Baptist Homes of the Midwest	MN	1,290	374	209	617	90
61	63	Sears Methodist Retirement System, Inc.	TX	1,284	531	138	466	149
62	49	SantaFe Senior Living	FL	1,276	940	276	60	0
63	50	Lutheran Life Communities	IL	1,273	243	283	747	0
64	52	Masonicare	CT	1,266	458	272	536	0
65	53	Baptist Village Retirement Communities of Oklahoma	OK	1,262	766	171	325	0
66	62	Lutheran Social Services of South Central Pennsylvania	PA	1,257	555	251	344	107
67	60	Lutheran SeniorLife	PA	1,252	412	327	458	55
68	81	Methodist Retirement Communities and Affiliates	TX	1,237	314	180	424	319
69	54	The Eddy	NY	1,230	499	313	418	0
70	55	Bethesda Senior Living Communities	CO	1,221	204	1,017	0	0
71	56	Virginia Baptist Homes	VA	1,217	770	227	220	0
72	58	Virginia United Methodist Homes, Inc.	VA	1,212	627	328	257	0
73	**NR	Wesley Woods Senior Living	GA	1,191	209	85	23	874
74	72	Wesley Enhanced Living	PA	1,181	501	218	300	162
75	**NR	Lutheran Social Services of Central Ohio	OH	1,179	126	48	125	880

## 6-3 2012 LeadingAge Ziegler 100

### Additional Listings: Multi-site Senior Living Providers

#### 6-3 RANKED BY TOTAL MARKET-RATE AND AFFORDABLE SENIOR LIVING UNITS

Rank	2012 LZ 100 Rank	System Name	State	Units (as of 12/31/11)				
				Total	ILU	ALU	NCB	AFF
76	70	Walker Methodist	MN	1,173	493	165	376	139
77	**NR	Wesley Living*	TN	1,172	24	60	0	1,088
78	**NR	Lutheran Social Ministries of New Jersey	NJ	1,171	281	125	267	498
79	61	EMA, Inc.	MD	1,157	652	228	277	0
80	**NR	Lutheran Social Services of Michigan	MI	1,114	297	103	376	338
81	64	Air Force Villages	TX	1,103	755	180	168	0
82	79	United Church Homes & Services	NC	1,089	520	91	328	150
83	82	Lutheran Homes of Michigan	MI	1,074	305	224	384	161
84	67	United Methodist Homes	NY	1,059	395	238	426	0
85	69	Lutheran Homes of South Carolina	SC	1,038	386	328	324	0
86	73	VMP	WI	1,016	574	205	237	0
87	**NR	Presbyterian Homes of Georgia*	GA	1,003	154	89	295	465
88	74	Elant	NY	999	148	148	703	0
89	80	United Methodist Retirement Homes, Inc.	NC	961	630	101	206	24
90	76	Menno Haven	PA	959	569	177	213	0
91	78	The Presbyterian Homes, Inc. of North Carolina	NC	958	634	133	189	2
92	**NR	Maple Knoll Communities	OH	956	373	91	248	244
93	93	Living Branches	PA	943	464	246	133	100
94	90	Simpson Senior Services	PA	939	494	172	192	81
95	**NR	The Lutheran Care Network*	NY	928	210	67	280	371
96	87	Oakwood Lutheran Senior Ministries	WI	920	593	160	137	30
97	**NR	Jewish Senior Life of Metropolitan Detroit*	MI	917	246	133	0	538
98	83	St. Ann's Community	NY	912	246	75	591	0
99	84	Christian Care Centers	TX	909	402	137	370	0
100	85	United Methodist Memorial Home	IN	909	181	469	259	0

When Total Senior Living Units are the same for two organizations they are then ranked by Independent Living Units, so the organization with the greater number of Independent Living Units receives the higher ranking (i.e. lower number)

\* No 2012 response provided

\*\* NR: No Rank. Not in the 2012 LZ 100 Primary Ranking

# LZ 100 Charts

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