



# SENIOR LIVING SYSTEM CEO PANEL

## PRESENTED BY

**Rev. Kenneth Daniel**  
CEO  
United Church Homes

**Kevin Gerber**  
CEO  
Covia Communities

**Dan Hermann**  
President & CEO  
Ziegler

**Mary Muñoz**  
Senior Managing Director  
Ziegler

## OBJECTIVES

- To hear the latest research trends from the LeadingAge Ziegler 200 organizations.
- To gain CEO insights on key trends as well as industry threats and opportunities.
- To identify best practices for system sophistication and growth.

# AGENDA

TOPIC 1: INTRODUCTION

TOPIC 2: KEY THEMES

TOPIC 3: INTRODUCTION OF CEO PANELISTS

TOPIC 4: PANEL DISCUSSION

QUESTIONS & ANSWERS

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TOPIC 1

# INTRODUCTION

# 2020: SELECT HOT TOPICS FOR NOT-FOR-PROFIT MULTI-SITES



# SYSTEM TRENDS 2020

## LZ 200 PUBLICATION: BACKGROUND AND METHODOLOGY

- Size not quality
- Not-for-profit multi-site senior living organizations primary focus
- Descriptive information on each system
  - state, size (by type of unit),
  - classification of system, rating,
  - accreditation, addition of 2<sup>nd</sup> community.
- Statistics related to affiliation, employees, residents and more
- Excludes affordable units and managed units when computing size; excludes primarily acute/post-acute/health care systems
- Comparable to other listings of largest organizations (i.e., Fortune 500)

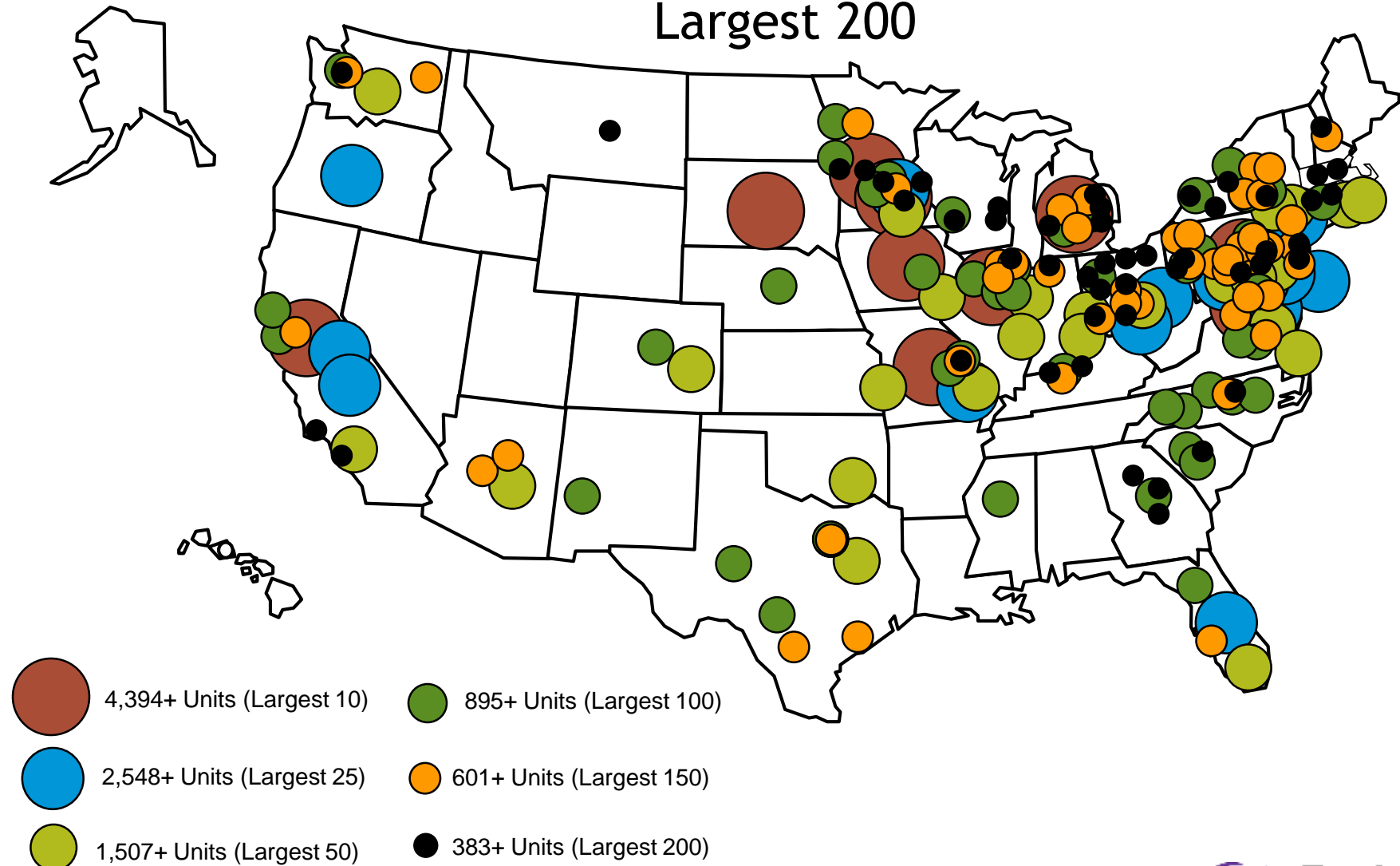


# 2020 LEADINGAGE ZIEGLER 200

## ORGANIZATIONAL CHARACTERISTICS: SYSTEM HEADQUARTERS

### HEADQUARTERS' LOCATIONS BY SIZE

Largest 200



## 2020 LEADINGAGE ZIEGLER 200

### THE NATION'S LARGEST NFP MULTI-SITE SENIOR LIVING ORGANIZATIONS BY ANNUAL REVENUE

Revenue Tier	Percentage	Avg. LZ 200 Rank
Tier I: $\geq$ \$200 million	15.7%	16
Tier II: \$100-\$199 million	17.5%	62
Tier III: \$50-\$99 million	37.3%	96
Tier IV: \$25-\$49 million	25.3%	144
Tier V: < \$25 million	2.4%	179

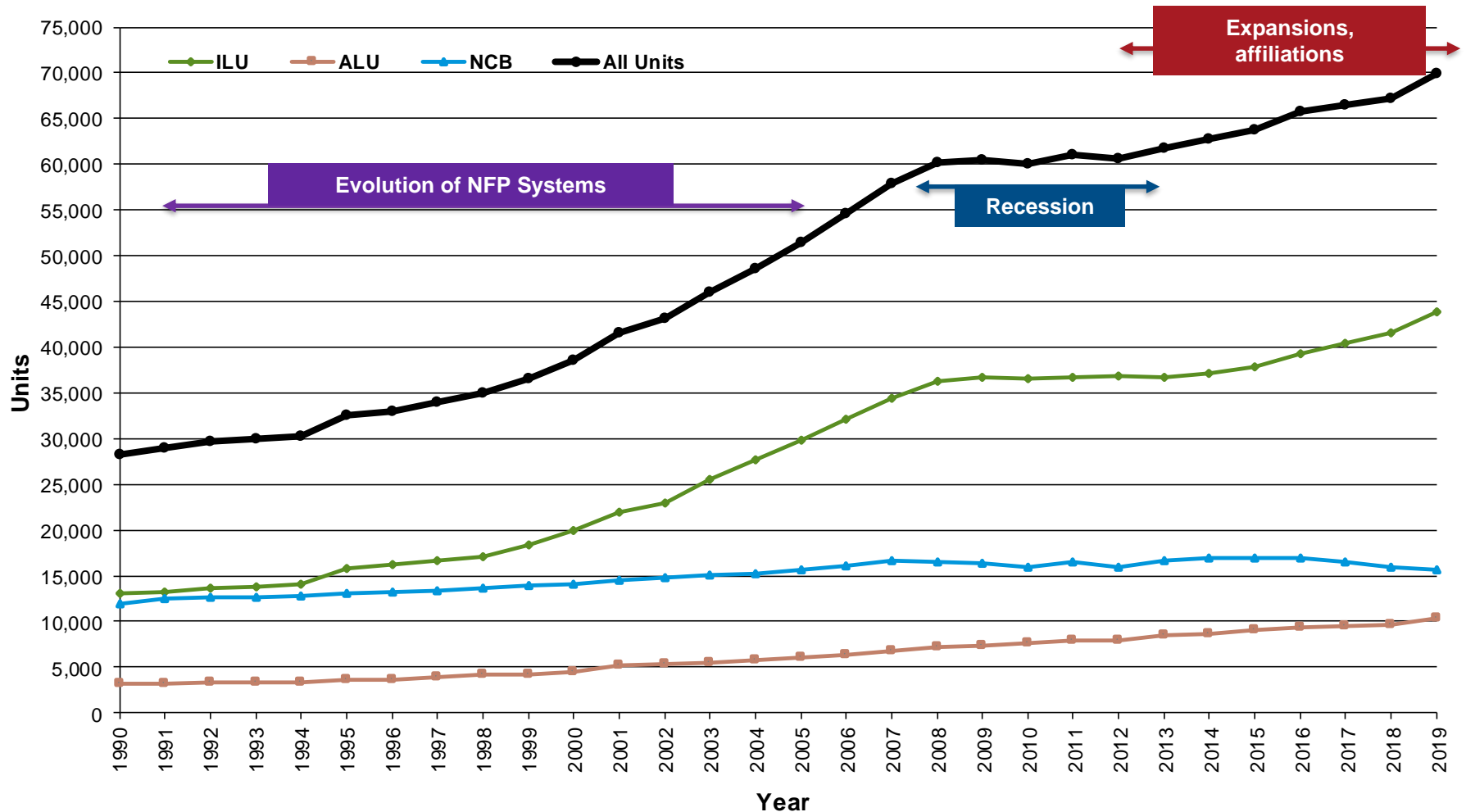
- All of the largest 25 are above \$200 million
- There are a total of 55 organizations above \$100 million annual revenue
- Several above \$100 million have significant HCBS revenue



# 2020 LeadingAge Ziegler 200

Growth: Growth of Largest 10 Systems, Combined Unit Mix

**FROM 1990** (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



# 2020 LEADINGAGE ZIEGLER 200

## THE NATION'S LARGEST NOT-FOR-PROFIT MULTI-SITE SENIOR LIVING ORGANIZATIONS RANKED BY TOTAL SENIOR LIVING UNITS

2020 Rank	2019 Rank	System Name	State	Units (as of 12/31/19)				Communities (as of 12/31/19)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses	MD	20,917	18,136	1,628	1,153	16	16	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	15,507	4,795	2,110	8,602	142	53	8	9	72
3	3	ACTS Retirement Services, Inc.	PA	9,592	6,737	1,118	1,737	26	26	0	0	0
4	5	Ascension Living	MO	8,129	2,124	1,203	4,802	48	2	5	3	38
5	4	Presbyterian Homes and Services	MN	7,958	4,118	2,389	1,451	46	15	28	0	3
6	6	Trinity Health Senior Communities	MI	5,715	1,839	1,199	2,677	54	6	13	14	21
7	8	HumanGood	CA	5,474	3,351	1,093	1,030	21	20	1	0	0
8	7	Covenant Living Communities & Services	IL	5,228	3,363	884	981	18	13	2	2	1
9	11	Lifespace Communities Inc.	IA	5,179	3,663	535	981	15	15	0	0	0
10	9	Benedictine fka Benedictine Health System	MN	4,394	726	1,496	2,172	33	25	1	4	3
11	12	Westminster Communities of Florida	FL	4,155	2,852	522	781	13	10	3	0	0
12	10	Retirement Housing Foundation	CA	4,098	2,646	841	611	18	9	8	1	0
13	13	Cassia	MN	3,920	522	1,512	1,886	51	0	5	28	18
14	14	The Kendal Corporation	PA	3,629	2,512	609	508	15	13	2	0	0
15	15	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	20	12	6	2	0
16	17	Asbury Communities, Inc.	MD	3,591	2,147	535	909	8	8	0	0	0
17	16	Lutheran Senior Services	MO	3,541	1,678	744	1,119	11	8	0	1	2
18	18	Ohio Living	OH	3,286	1,732	567	987	13	13	0	0	0
19	19	The Carmelite System, Inc.	NY	3,157	144	421	2,592	16	1	1	2	12
20	20	Pacific Retirement Services, Inc.	OR	3,073	2,310	378	385	9	9	0	0	0
21	21	Front Porch Communities and Services	CA	2,860	2,159	183	518	10	5	5	0	0
22	22	Concordia Lutheran Ministries	PA	2,806	996	1,147	663	14	6	0	6	2
23	23	Otterbein SeniorLife	OH	2,630	1,123	496	1,011	15	6	0	0	9
24	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,557	1,614	259	684	5	3	1	0	1
25	24	Springpoint Senior Living Inc.	NJ	2,548	1,740	317	491	9	8	0	0	1

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				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	26	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
27	27	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	9	9	0	0	0
28	28	Christian Care Companies	AZ	2,399	1,911	420	68	7	0	6	0	1
29	29	Presbyterian Manors of Mid-America, Inc.	KS	2,247	908	563	776	16	15	0	1	0
30	30	Shell Point Retirement Community	FL	2,204	1,406	449	349	2	2	0	0	0
31	31	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
32	33	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
33	34	Willow Valley Communities	PA	2,044	1,547	214	283	3	3	0	0	0
34	36	Homewood Retirement Centers Inc.	MD	1,873	1,134	288	451	5	5	0	0	0
35	38	Transforming Age	WA	1,848	1,097	751	0	14	3	7	4	0
36	44	WesleyLife	IA	1,843	808	375	660	10	10	0	0	0
37	37	Greencroft Communities	IN	1,842	646	586	610	9	7	0	2	0
38	39	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
39	43	Bethesda Senior Living Communities	CO	1,762	111	1,651	0	18	0	2	16	0
40	35	Franciscan Communities, Inc.	IL	1,700	742	345	613	7	4	1	2	0
41	55	Buckner Retirement Services, Inc.	TX	1,688	1,018	344	326	6	6	0	0	0
42	40	Loretto	NY	1,684	210	551	923	9	1	2	4	2
43	42	Covenant Health	MA	1,636	0	364	1,272	12	0	0	3	9
44	41	National Church Residences	OH	1,607	861	521	225	9	3	3	3	0
45	45	Hebrew SeniorLife	MA	1,592	659	119	814	4	2	1	0	1
46	46	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
47	48	Lutheran Life Communities	IL	1,551	408	360	783	6	4	0	0	2
48	50	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
49	64	BHI Senior Living Inc	IN	1,517	472	693	352	5	5	0	0	0
50	51	Eskaton	CA	1,507	393	688	426	12	1	1	7	3

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51	57	United Church Homes, Inc.	OH	1,491	448	273	770	11	5	2	0	4
52	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
53	56	Bethesda Health Group, Inc	MO	1,460	727	78	655	12	0	6	2	4
54	53	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
55	49	Providence Life Services	IL	1,421	767	372	282	7	1	4	1	1
56	54	Presbyterian Homes	IL	1,420	842	237	341	4	3	1	0	0
57	47	Covia Communities	CA	1,352	954	100	298	5	5	0	0	0
58	58	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
59	76	Methodist Retirement Communities	TX	1,316	629	393	294	7	5	1	1	0
60	59	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
61	60	Lutheran Services Carolinas	NC	1,302	311	259	732	9	1	1	1	6
62	61	Presbyterian Village of Michigan	MI	1,270	904	264	102	10	1	7	2	0
63	71	LifeSpire of Virginia	VA	1,269	757	285	227	4	4	0	0	0
64	68	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
65	67	American Baptist Homes of the Midwest	MN	1,245	384	253	608	7	5	0	0	2
66	62	Immanuel	NE	1,240	646	393	201	17	7	1	7	2
67	63	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
68	151	UMRC and Porter Hills	MI	1,199	678	335	186	6	3	2	1	0
69	69	Holland Home	MI	1,196	749	288	159	6	2	0	2	2
70	65	SpiriTrust Lutheran	PA	1,193	557	292	344	6	6	0	0	0
71	92	Western Home Services	IA	1,184	587	314	283	5	2	2	0	1
72	72	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
73	78	Eventide	MN	1,142	71	469	602	6	5	0	1	0
74	111	Ingleside	MD	1,128	832	157	139	3	3	0	0	0
75	66	Friendship Senior Options	IL	1,127	701	184	242	2	2	0	0	0

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76	75	Lutheran SeniorLife	PA	1,123	489	192	442	5	2	3	0	0
77	70	Pinnacle Living	VA	1,121	514	393	214	5	5	0	0	0
78	79	United Methodist Homes	NY	1,088	389	273	426	4	3	1	0	0
79	73	Walker Methodist	MN	1,075	0	748	327	9	0	0	8	1
80	77	Lutheran Homes of SC	SC	1,060	404	306	350	5	5	0	0	0
81	87	The Presbyterian Homes, Inc.	NC	1,028	706	133	189	3	3	0	0	0
82	81	Saint Therese	MN	1,010	475	125	410	5	3	1	0	1
83	85	Blue Skies of Texas	TX	1,001	728	129	144	2	2	0	0	0
84	80	Presbyterian Communities of South Carolina	SC	1,001	411	316	274	6	6	0	0	0
85	83	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
86	84	Friendship Villages of St. Louis	MO	987	691	88	208	2	2	0	0	0
87	94	The United Methodist Retirement Homes, Inc.	NC	984	674	108	202	3	3	0	0	0
88	86	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
89	88	Baruch fka Baruch Senior Ministries	MI	957	2	955	0	24	0	0	24	0
90	89	Haverland Carter Lifestyle Group	NM	954	414	442	98	4	2	0	2	0
91	90	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	2	2	0	0	0
92	91	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
93	93	Sequoia Living, Inc	CA	946	702	103	141	3	3	0	0	0
94	95	Wesley	WA	930	592	154	184	3	2	1	0	0
95	96	Christian Care Communities	KY	930	365	160	405	7	5	1	1	0
96	105	Christian Living Communities	CO	921	464	261	196	5	3	0	2	0
97	98	Presbyterian Communities & Services	TX	917	377	208	332	2	2	0	0	0
98	99	St. John's	NY	916	403	38	475	4	0	1	1	2
99	104	St. Ann's of Greater Rochester, Inc.	NY	914	297	75	542	3	2	1	0	0
100	102	Givens Communities	NC	895	674	91	130	2	2	0	0	0

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101	101	Masonic Homes of Kentucky	KY	888	450	151	287	3	1	1	0	1
102	103	United Methodist Communities	NJ	878	88	542	248	4	1	0	3	0
103	108	St. Andrew's Resources for Seniors System	MO	877	379	208	290	6	1	2	1	2
104	112	Sun Health Services fka Sun Health Senior Living LLC	AZ	866	637	114	115	3	3	0	0	0
105	97	Menno Haven, Inc.	PA	858	434	178	246	2	2	0	0	0
106	106	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
107	107	Living Branches	PA	839	459	237	143	3	2	0	1	0
108	109	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
109	131	The RiverWoods Group	NH	834	623	124	87	3	3	0	0	0
110	110	Lutheran Social Ministries of Maryland	MD	823	639	69	115	2	2	0	0	0
111	129	Landis Communities	PA	811	548	160	103	3	1	1	1	0
112	116	Life Enriching Communities	OH	811	532	135	144	2	2	0	0	0
113	113	LutherCare	PA	810	473	126	211	3	2	0	0	1
114	114	Messiah Lifeways	PA	807	440	183	184	2	1	1	0	0
115	115	Simpson Senior Servies	PA	802	454	170	178	3	3	0	0	0
116	117	Mather fka Mather LifeWays	IL	801	665	59	77	3	2	1	0	0
117	118	Wesley Willows	IL	799	539	169	91	2	1	1	0	0
118	119	National Lutheran Communities & Services	MD	795	435	180	180	3	0	2	1	0
119	120	The Ohio Masonic Home	OH	787	377	246	164	3	2	0	1	0
120	122	Sunnyside Presbyterian Home	VA	786	495	157	134	3	3	0	0	0
121	121	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
122	123	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
123	124	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	3	1	0	0	2
124	127	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
125	128	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4

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126	126	Samaritas	MI	762	294	120	348	5	1	2	0	2
127	125	Christian Care Centers	TX	757	409	229	119	3	3	0	0	0
128	130	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	3	3	0	0	0
129	132	Benevolent Corporation Cedar Community	WI	746	409	227	110	8	0	3	4	1
130	133	Vista Prairie Communities	MN	736	100	636	0	8	0	0	8	0
131	134	Moorings Park	FL	731	511	114	106	2	2	0	0	0
132	136	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
133	137	Morningside Ministries	TX	707	343	154	210	2	2	0	0	0
134	138	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
135	139	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
136	141	Maple Knoll Communities, Inc.	OH	686	388	91	207	2	2	0	0	0
137	135	The Wesley Communities fka Methodist ElderCare Services	OH	678	338	234	106	3	1	2	0	0
138	142	Sunset Senior Communities fka Sunset Retirement Communities & Services	MI	677	304	263	110	4	2	0	1	1
139	144	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
140	145	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	4	1	2	0	1
141	154	Smith Senior Living	IL	658	322	144	192	2	2	0	0	0
142	146	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
143	159	Baptist Homes Society	PA	653	326	138	189	2	1	0	0	1
144	148	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
145	149	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
146	150	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
147	NR	Luther Manor	WI	633	325	156	152	2	1	0	1	0
148	143	CRISTA Senior Living	WA	624	374	141	109	2	2	0	0	0
149	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
150	153	Baptist Retirement Homes of North Carolina Incorporated	NC	601	262	138	201	4	2	0	1	1

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151	155	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
152	156	Genacross Lutheran Services	OH	598	138	175	285	4	2	1	0	1
153	157	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
154	158	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
155	160	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
156	162	Friends Homes, Inc.	NC	568	359	100	109	2	2	0	0	0
157	164	Sholom	MN	568	154	142	272	5	0	1	2	2
158	165	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
159	161	Ebenezer Society	MN	567	0	320	247	8	0	0	5	3
160	166	Episcopal Communities & Services	CA	566	436	82	48	3	3	0	0	0
161	167	Bethel	NY	563	170	130	263	5	1	1	1	2
162	168	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
163	169	Friendly Senior Living	NY	554	298	56	200	4	0	2	1	1
164	170	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
165	171	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
166	172	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
167	173	Medford Leas	NJ	535	392	119	24	2	1	1	0	0
168	175	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
169	174	Rockwood Retirement Communities	WA	528	368	95	65	2	2	0	0	0
170	176	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
171	140	Lutheran Life Villages	IN	524	135	65	324	3	1	0	0	2
172	177	Redstone Presbyterian SeniorCare	PA	516	305	134	77	7	0	3	3	1
173	178	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
174	180	Presbyterian Homes of Georgia	GA	501	117	89	295	5	2	3	0	0
175	181	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0



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176	182	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
177	183	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
178	184	Knute Nelson	MN	484	211	180	93	6	0	2	3	1
179	NR	St. Paul's Episcopal Home, Inc.	CA	481	135	287	59	4	0	1	2	1
180	185	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
181	179	Avinity fka Avinity Senior Living	MN	477	363	114	0	6	0	3	3	0
182	186	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
183	187	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
184	188	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
185	189	Allegheny Lutheran Social Ministries	PA	451	203	96	152	3	3	0	0	0
186	190	Beechwood Health Care Center, Inc.	NY	447	110	65	272	3	0	1	1	1
187	191	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
188	192	Council for Jewish Elderly	IL	441	36	165	240	3	0	1	1	1
189	193	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
190	194	Baptist Life Communities	KY	428	150	60	218	6	1	2	1	2
191	197	Parker Health Group, Inc.	NJ	427	0	80	347	5	0	0	1	4
192	195	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
193	Over 200	Jewish Senior Life of Metropolitan Detroit	MI	420	290	130	0	4	0	2	2	0
194	196	A.G. Rhodes Health & Rehab	GA	418	0	0	418	3	0	0	0	3
195	198	Colonial Senior Services, Inc	OH	411	182	101	128	3	3	0	0	0
196	200	SCBMA	SC	402	94	134	174	2	2	0	0	0
197	199	Clark Retirement Community, Inc.	MI	401	194	168	39	2	2	0	0	0
198	Over 200	Saint Mary's Home of Erie	PA	393	26	148	219	6	1	1	2	2
199	Over 200	Valley View Retirement Community	PA	390	133	95	162	2	2	0	0	0
200	Over 200	Good Shepherd Communities	NY	383	194	105	84	2	2	0	0	0

# THE POTENTIAL FUTURE NOT-FOR-PROFIT COMPREHENSIVE SENIOR LIVING & SERVICES MODEL

## CONCENTRATION IN PRIMARY & ADJACENT MARKETS

**Market Rate IL – hospitality focus**  
(Primarily Entry EF; Rental)

**Middle Market Independent**  
(Moderate EF & Rental)

**Assisted Living**

**Memory Care**

**Skilled Nursing**  
-private pay  
-post-acute  
-Medicaid

**Government Subsidized IL**  
-HUD 202  
-tax credit



**Continuing Care at Home**

**Home Health**

**Home Care**

**Hospice**

**Concierge**

**Adult Day**

**PACE**

**Home Services**

Maximization of partnerships in the region

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ITEM 2

KEY THEMES

## KEY THEMES: SHIFTING OVER TIME

### 2000-2007

- Corporate Structure
- Growth
- Capital planning for growth
- Economies of Scale
- Strategy
- Brand and positioning

### 2008-2010

- Changing markets and position
- Crisis management
- New paradigms
- HCBS Growth
- What's next?

### 2011-2020

- Technology
- Board and organizational sophistication
- Innovation
- Healthcare reform
- Partnerships, joint ventures, affiliations
- Growth
- COVID-19

## SYSTEM PANELISTS: PRIOR YEARS

ACTS Retirement-Life Communities  
Asbury Communities  
BHI Senior Living  
Buckner Retirement Services  
Christian Living Communities  
Covenant Retirement Communities  
Deaconess Abundant Life Communities  
Diakon Lutheran Social Ministries  
Ecumen  
EMA, Inc.  
Episcopal Homes Foundation  
Episcopal Retirement Services  
Evangelical Homes of Michigan  
Franciscan Communities  
Front Porch  
Holland Home  
Life Care Retirement Communities  
Life Enriching Communities  
Lutheran Homes of South Carolina  
Lutheran Life Communities  
Lutheran Senior Services  
Masonic Villages of the Grand Lodge

Methodist Retirement Communities  
Ohio Presbyterian Retirement Services  
Otterbein Senior Lifestyle Choices  
Phoebe Ministries  
PHS Senior Living  
Presbyterian Homes of Minnesota  
Presbyterian Manors of Mid-America  
Presbyterian Retirement Communities NW  
Presbyterian Villages of Michigan  
Rest Haven Christian Services  
Sears Methodist Retirement Services  
Southern California Presbyterian Homes  
Springpoint Senior Living  
St. Ann's Communities  
St. Paul's Senior Homes & Services  
Sunnyside Communities  
The Kendal Corporation  
The RiverWoods Company  
VibrantLiving Communities & Services  
Virginia Baptist Homes  
Wesley Enhanced Living  
Wesley Homes

# SYSTEM PANELISTS: PRIOR YEARS



Where Loving-Kindness Lives



## SYSTEM PANELISTS: 2020

United Church Homes  
LZ 200 #51  
*Rev. Kenneth Daniel*



Covia Communities  
LZ 200 #57  
*Kevin Gerber*



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TOPIC 3

# INTRODUCTION TO COVIA & UNITED CHURCH HOMES



# NON-PROFIT MULTI-SITE SENIOR LIVING ORGANIZATION *PROFILE*

## 2020 LZ 200: *COVIA COMMUNITIES*

- LZ 200 #: **57**
  - Year Founded: **1965**
  - Total Units (as of 12/31/19): **1,352**
    - **954 ILUs**
    - **100 ALUs**
    - **298 NCBs**
  - Classification: Primary: **State Region**
  - Total # of Communities: **5**  
# of Accredited Communities: **0**
  - Debt Rating: Yes                      Fitch: **A-**
  - Affordable Housing: 8 Locations, 911 Units
  - Managed Communities: 2 Locations, 174 Units
  - Practices: A well respected provider of LPC and affordable housing services with highly desirable urban and suburban destination locations in Northern California. Board committed to expansion of mission and service to a broader socio-economic demographic.
- Headquarters Location: **California, Walnut Creek**
- Religious Affiliation: **Historically Episcopal**
- 1<sup>st</sup> Community opened in 1965  
2<sup>nd</sup> Community opened in 1966  
3<sup>rd</sup> Community opened in 1971
- Secondary: **Metropolitan**
- # of LPCs : **5**  
Accrediting Organization(s): **none**
- S&P: **N/A**

# NON-PROFIT MULTI-SITE SENIOR LIVING ORGANIZATION *PROFILE*

## 2020 LZ 200: *COVIA COMMUNITIES*



# NON-PROFIT MULTI-SITE SENIOR LIVING ORGANIZATION *PROFILE*

## 2020 LZ 200: *COVIA COMMUNITIES*

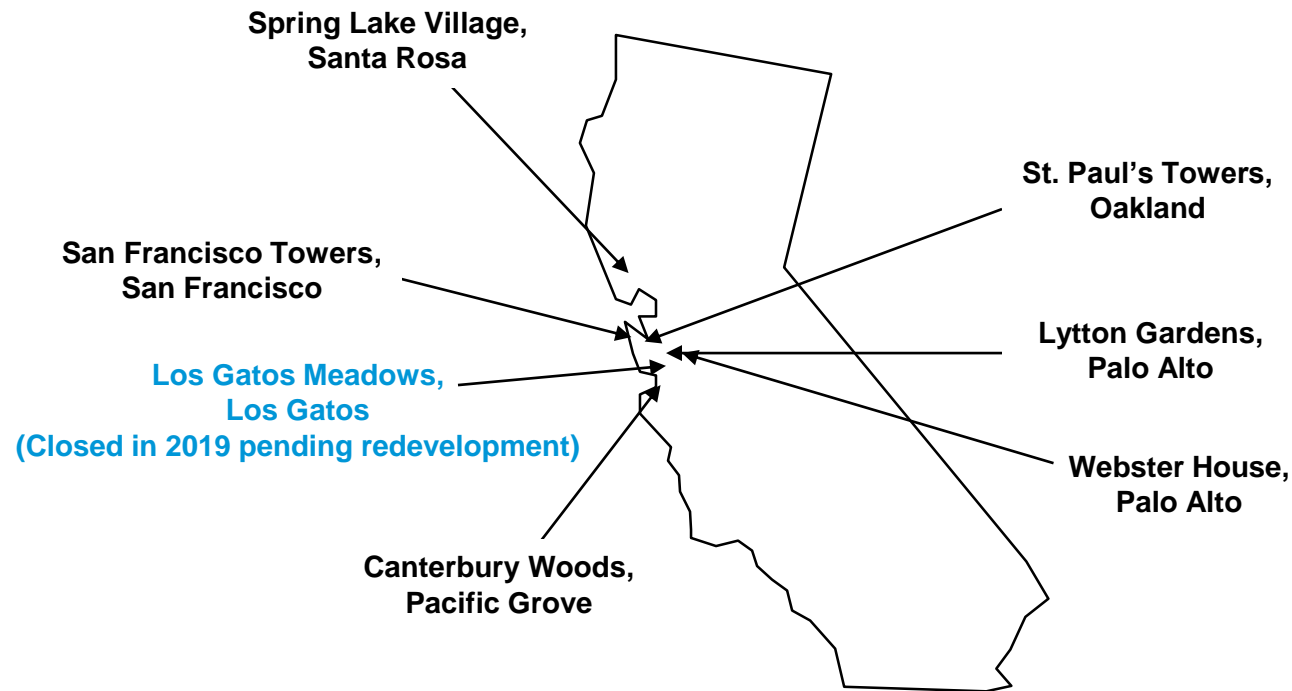


**Covia Communities**  
**Walnut Creek, California**  
[www.jtm-esc.org](http://www.jtm-esc.org)



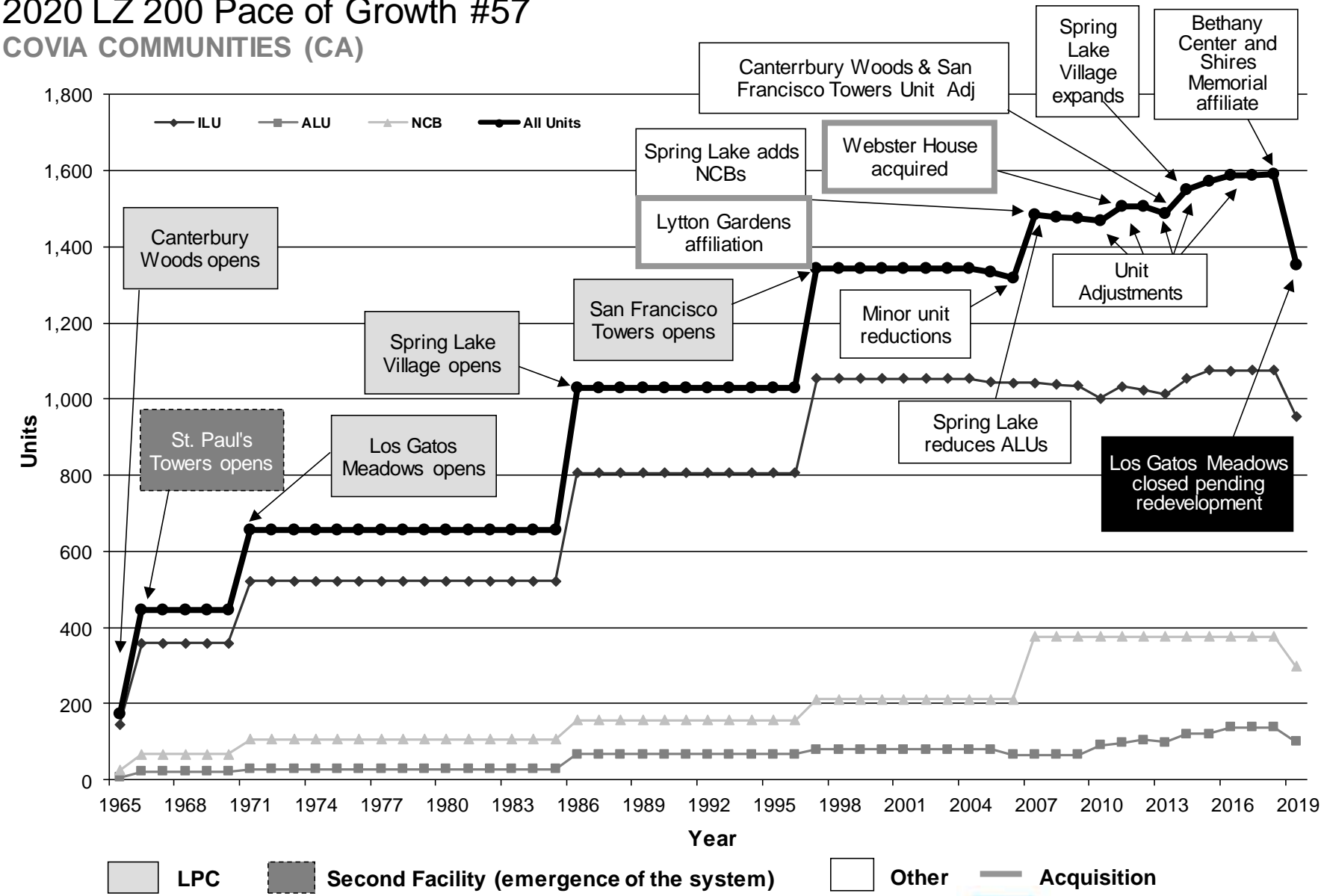
# NON-PROFIT MULTI-SITE SENIOR LIVING ORGANIZATION *PROFILE*

## 2019 LZ 200: *COVIA COMMUNITIES*

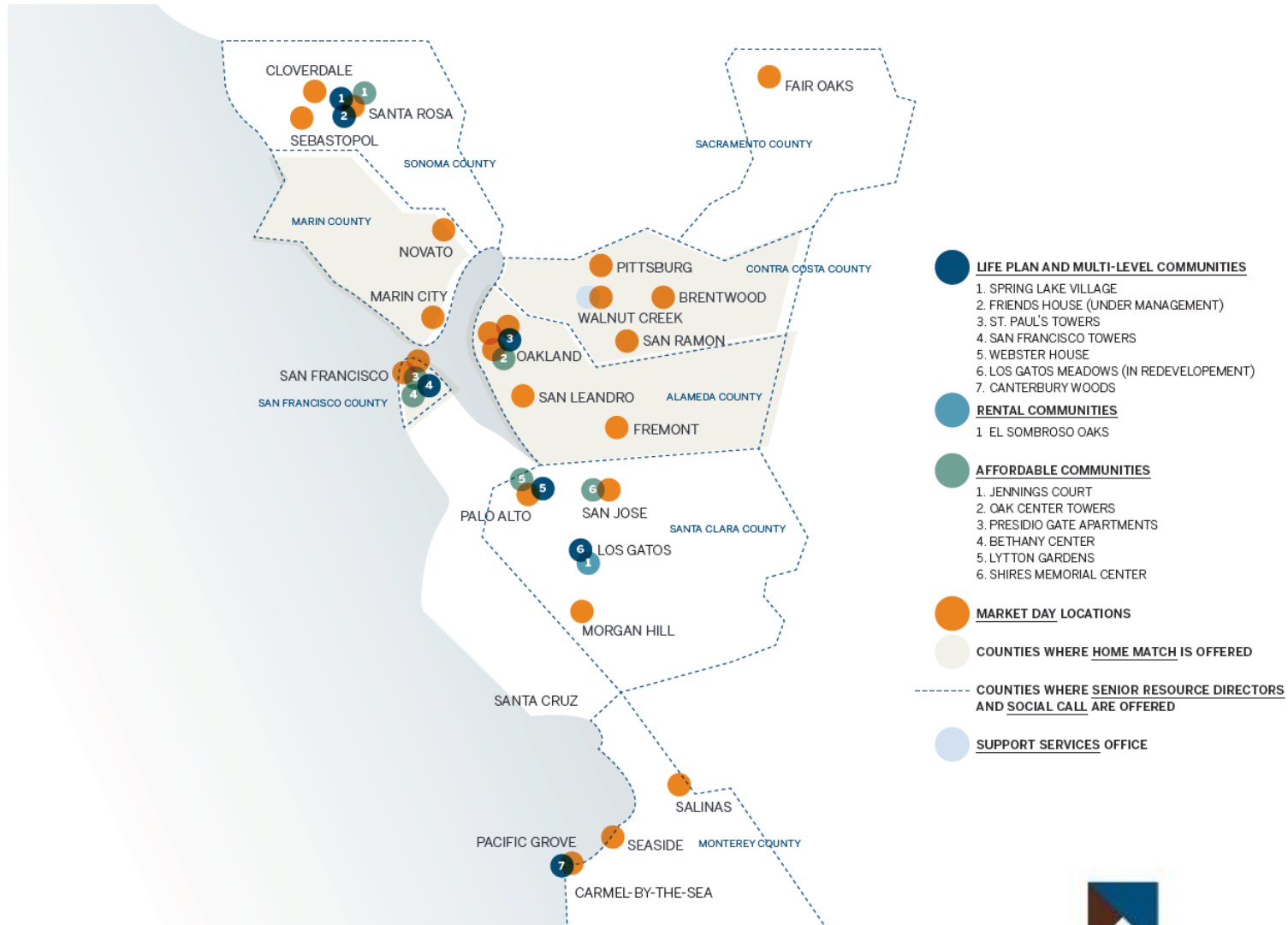


# 2020 LZ 200 Pace of Growth #57

## COVIA COMMUNITIES (CA)



# COVIA SYSTEM GEOGRAPHY AND REACH





# STATED LONG STANDING GOAL FOR PLANNED GROWTH

**Financial Strength:** Maintain indicators of solid financial footing to meet commitments, position for growth and weather uncertainty.

**Planned Growth:** Increase access to services for older people across the continuum in target market areas, and increase the number of communities to strengthen the ESC system.

**Organizational Effectiveness:** Optimize resources to perform at a high level of efficiency and employee engagement, and to ensure the ability to adapt to new opportunities.

**Quality Performance:** Exceed generally accepted quality measures while maintaining strong regulatory integrity.

**Market Relevance:** Apply rigor to evaluate and implement ways to enhance, adapt and differentiate each community in its own market.

# COVIA AND FRONT PORCH AFFILIATION





## COVIA AND MINKA

- Investment to design “California” Minka
- Demonstration Project in Santa Rosa
  - Accessory Dwelling Unit (ADU)
- Potential for Expansion of existing Covia communities
- ADU Market in California
- Middle Market Solution
  - with Covia Community Services
  - with Technology substrate

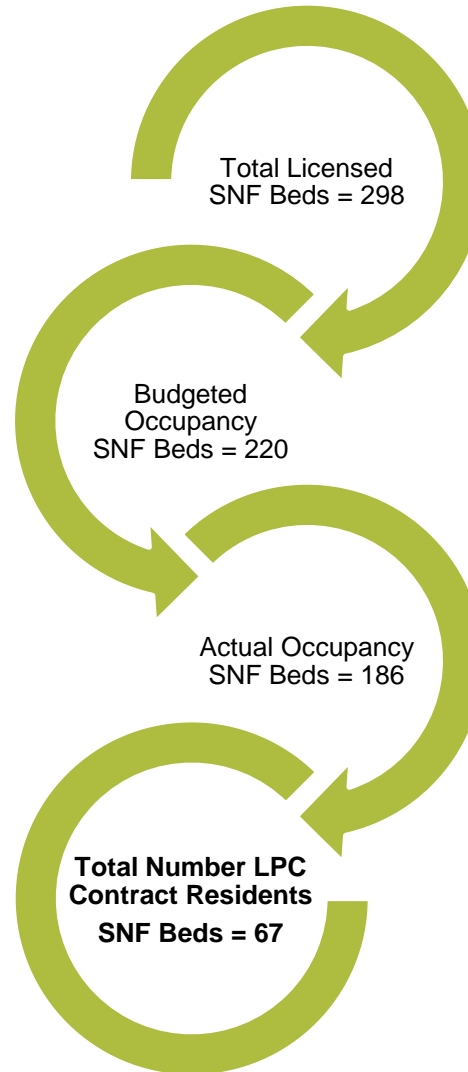
### WINNING ASPIRATION

To create a demonstration of attainable housing that is feasible to scale and replicate while meeting California standards. Beyond a build that embraces universal design, is aesthetically light-filled, beautiful, and provides a technology substrate and sustainable energy, Covia will win by creating healthy communities that links these individual homes to programs and services at a manageable cost. The successful demonstration will create a pathway for housing for a broader audience that is centered on health, wellness, and innovation.



Ziegler

# COVIA'S SKILLED NURSING EXPERIENCE



# NON-PROFIT MULTI-SITE SENIOR LIVING ORGANIZATION *PROFILE*

## 2020 LZ 200: *UNITED CHURCH HOMES*

• LZ 200 #: **51**                      Headquarters Location: **Ohio, Marion**

• Year Founded: **1920**

- Total Units (as of 12/31/19): 1,491
  - **448 ILUs**
  - **273 ALUs**
  - **770 NCBs**

1<sup>st</sup> Community opened in 1920  
2<sup>nd</sup> Community opened in 1964  
3<sup>rd</sup> Community opened in 1966

• Classification: Primary: **National**                      Secondary: **Single-state**

• Total # of Communities: **11**                      # of CCRCs: **5**  
# of Accredited Organizations: **0**

• Debt Rating: No                      Fitch: **N/A**                      S&P: **N/A**

- Affordable Housing: 52 Locations, 2,221 Units
- Managed Housing: 12 Locations, 1,476 Units

# NON-PROFIT MULTI-SITE SENIOR LIVING ORGANIZATION *PROFILE*

## 2020 LZ 200: *UNITED CHURCH HOMES*



# NON-PROFIT MULTI-SITE SENIOR LIVING ORGANIZATION *PROFILE*

## 2020 LZ 200: *UNITED CHURCH HOMES*



***United Church Homes***

***Marion, Ohio***

***[www.unitedchurchhomes.org](http://www.unitedchurchhomes.org)***

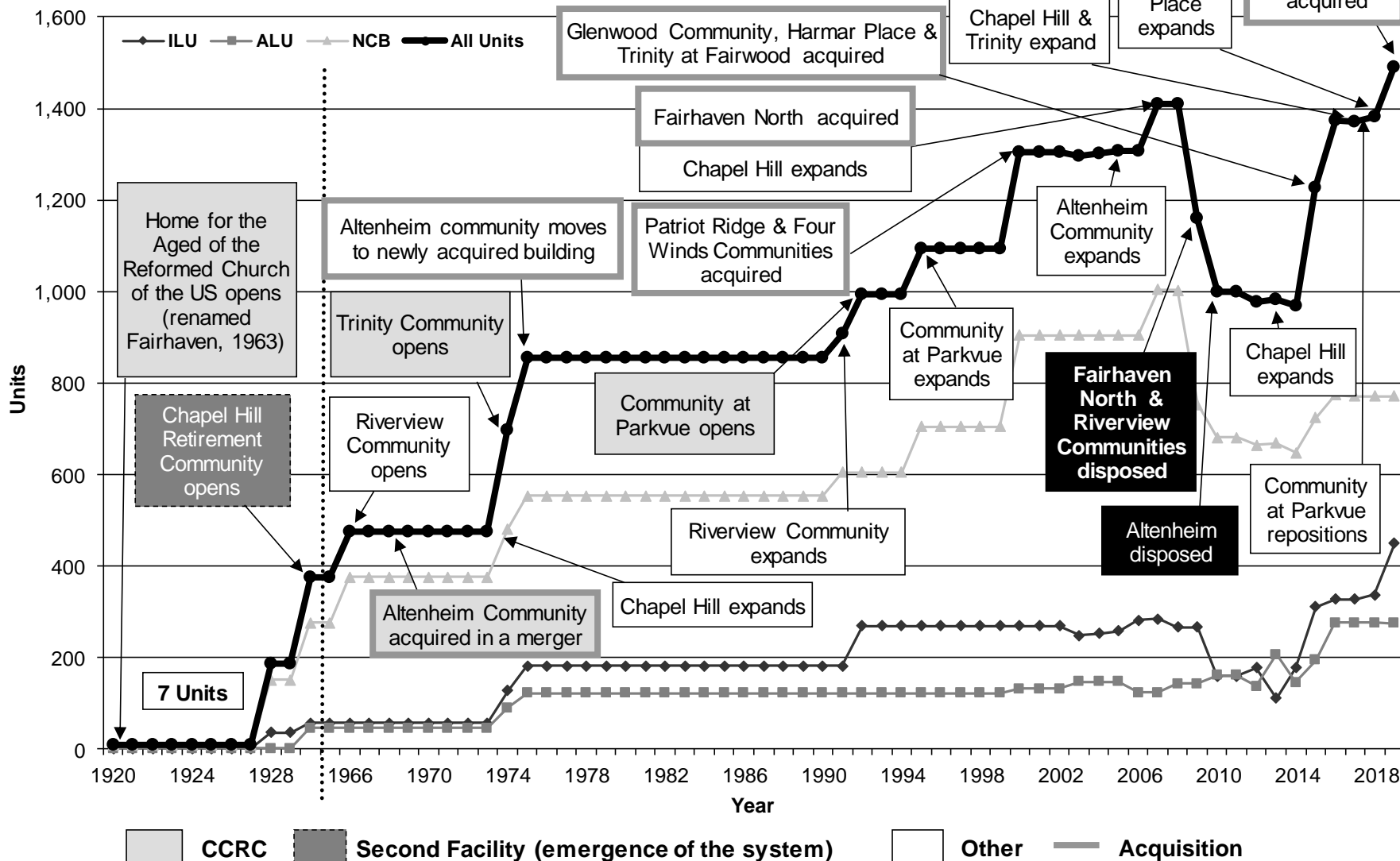
# NON-PROFIT MULTI-SITE SENIOR LIVING ORGANIZATION *PROFILE*

## 2020 LZ 200: *UNITED CHURCH HOMES*



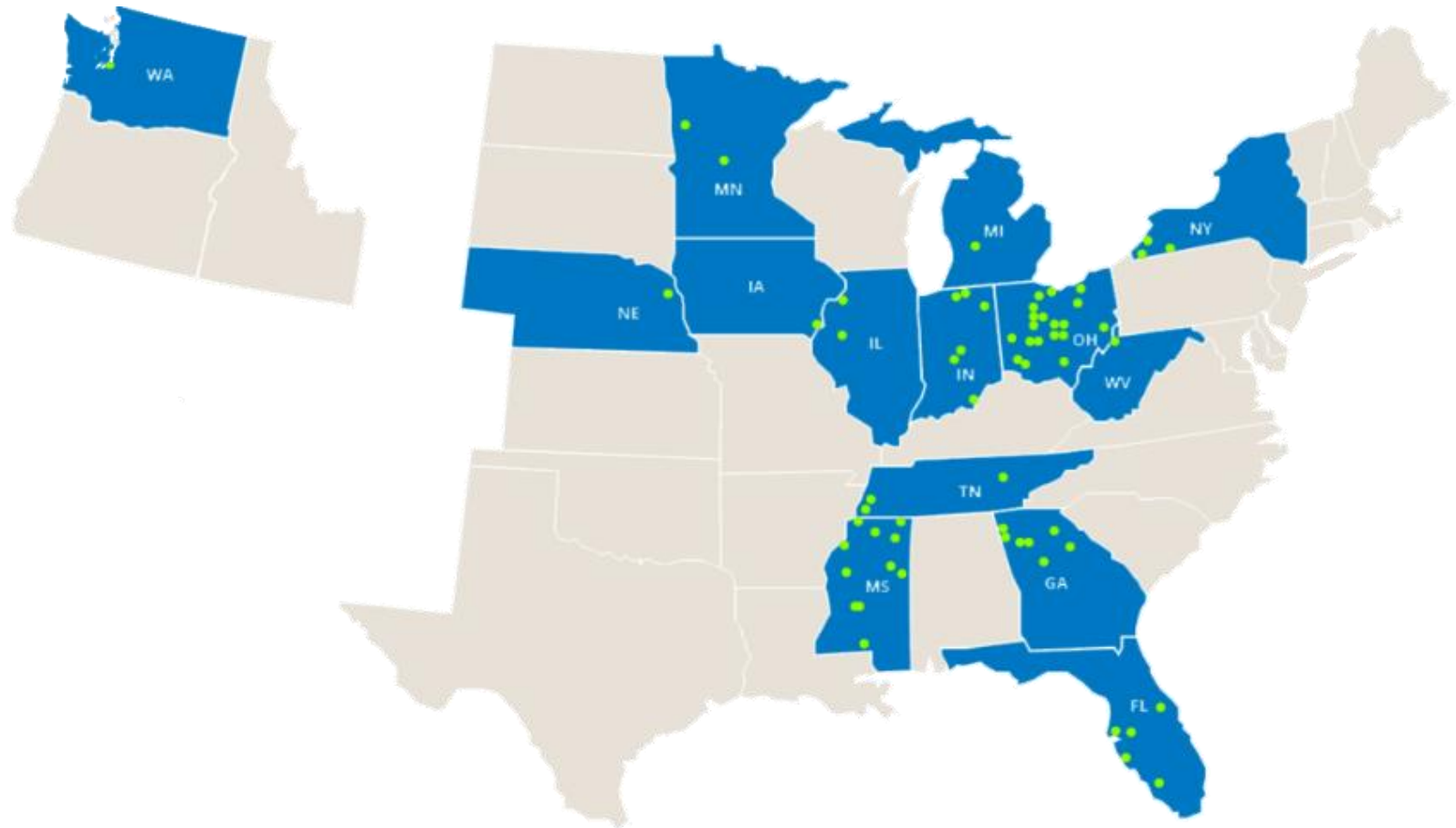
# 2020 LZ 200 Pace of Growth #51

## UNITED CHURCH HOMES (OH)





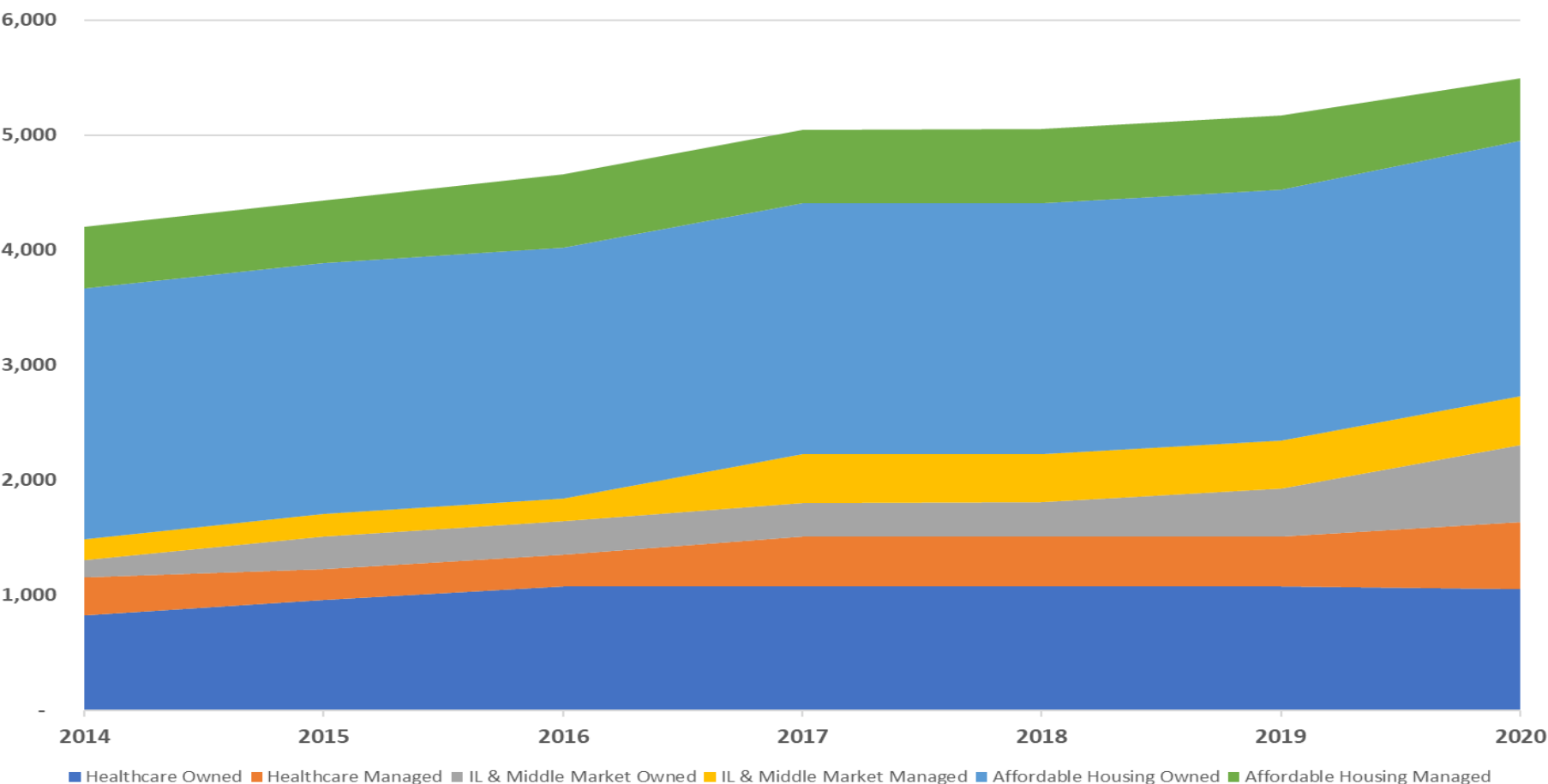
# EXPANDED FOOTPRINT OWNED & MANAGED COMMUNITIES





# GROWTH STRATEGY RESULTS

United Church Homes  
Owned and Managed Units - 2014-2020





TOPIC 4

# PANEL DISCUSSION

## QUESTION 1

In the introduction section, we spoke about the growth trends among not-for-profit providers.

- Can you comment on your growth plans as an organization?
- Has any of that changed across the past six months given the COVID-19 pandemic?

## QUESTION 2

- Would you comment on the your offerings, now and in the future, to meet the needs of an economically diverse population?

## QUESTION 3

- Can you contrast your organizational growth in services (HCBS) versus bricks-and-mortar?
- Is it one more than the other?
- Why/why not?

## QUESTION 4

- What is your commitment to skilled nursing now and going forward? Some providers are reinvesting, while some are scaling back.
- How are you remaining competitive given all of the pressures in this space?

## QUESTION 5

The last several years have been difficult from a recruitment and retention standpoint and the past six months have exacerbated many of those pressures.

- How is your organization faring on the workforce front and are there any specific initiatives on your part that you would like to comment on?

## QUESTION 6

Let us talk a bit about technology.

- What is your organization's position on the role of technology in your operations, in addressing some of your challenges, etc.?



## QUESTION 7

- What are your top strategies as you look ahead to the year ahead?

# QUESTIONS & ANSWERS



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- Founded in 1902, Ziegler specializes in the healthcare, senior living and educational sectors as well as general municipal finance

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