

# 2010 Steady And Cautious

**A**nother year of economic turmoil is over, but on the horizon are significant Medicare cuts to skilled nursing facilities: a 10-year \$14.6 billion productivity adjustment to the skilled nursing facility market basket beginning in fiscal year 2012. Providers are also facing the resource utilization group (RUG) IV implementation, the impact of which is uncertain, while provisions in the new health care reform law, such as employer health care insurance mandates, employee background check requirements, and others, will also impact long-term and post-acute care providers.

All of these issues will likely translate into a play-it-safe mentality that appears to reflect the last year as well. That said, the Top 50 Nursing Facility Companies made little noise in terms of mergers and acquisitions in 2009, although there were some modest fluctuations in bed counts.

HCR ManorCare took the lead spot for the sixth consecutive year, while No. 8, Extencare, reported a bed count reduction of 1,375. No. 5, Genesis HealthCare, lost 2,496 beds. Even with this loss, the company's total bed count of 25,451 is still higher than its 2008 count of 23,195.

## Rehab Remains Popular

Providers continue to renovate facilities and add ancillary or specialty care services, despite a reported lack of available financing. Some 27 companies plan to add rehabilitation suites or units, and seven of the top 50 will add

specialty care services such as dialysis, ventilator, or bariatric care. Outpatient rehabilitation continues its rise in popularity, with 37 companies now offering it, compared with 32 last year.

Five companies are planning to add home care to their menu of services,

## Two dozen companies are planning to implement culture change initiatives.

while a total of 21 companies on the list this year already offer it, up from 19 last year.

Three companies indicated plans to add Alzheimer's or dementia care with secured units. This figure may seem low, but 46 providers already count this type of care among their services.

Hospice care has risen moderately among the top 50, with 31 providers now offering it, compared with last year's count of 24.

## Modest Jostling

Two companies had modest relocations in the rankings this year. Signature HealthCare slid down two slots, from No. 12 last year to No. 15 this year. Stonegate Senior Care jumped two slots, from No. 26 to 24 this year, with only 324 additional beds.

Trilogy Health Services slid from the No. 18 spot last year to No. 28 this year, with a reported bed count reduction of 2,191.

These shifts in rankings are due in part to the fact that several companies did not participate in this year's ranking, leaving slots open for others to move into.

Among the companies that opted out of participating in the survey this year are: Encore Healthcare, ranked No. 24 last year; Avante Group, ranked No. 37 in 2009; Apple Health Care, No. 38 last year; and Prestige Care, No. 42 last year.

## Culture Change Coming

A new question on the survey this year revealed a remarkable response: At least two dozen companies are planning to implement culture change initiatives at their facilities, with a majority of companies planning to create a more "homelike atmosphere." These initiatives include removing nurses' stations, installing "resident-centered furniture," and implementing "I" care plans.

Many companies will add amenities like new dining and meal options, consistent assignment, and enhanced, "spa-like" bathing services.

A lesser number of companies reported plans to incorporate or build small-house models or "the neighborhood concept."

On the following pages is *Provider's* annual ranking of the top 50 nursing facility companies, as of Dec. 31, 2009. The data indicate the 50 leading companies' 2009 revenue, occupancy rates, extent of regionalism, and range of services.

—Meg LaPorte

# Top 50 Nursing Facility Companies

Company Name/ Chief Executive Officer	City, State/ Telephone/Web address	Total SNF/NF Beds (including subacute)	Total Facilities	% Occ. Rate	States with SNF/NF	Revenue Sources:				Total Operating Revenue	Services Offered:									
						% Medicare	% Private Pay	% Medicaid	% VA and Other		Traditional Nursing	Postacute	Dementia Care	Assisted Living	Independent Living	Therapy	Outpatient Therapy	Pharmacy	Home Care	Hospice
1. HCR ManorCare* Paul Ormond	Toledo, OH (419) 252-5500 www.hcr-ManorCare.com	38,092	277	N/A	30	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x	x	x	x
2. Golden Living* Neil Kurtz, MD	Fort Smith, AR (479) 201-2000 www.GoldenLiving.com	31,696	306	N/A	21	N/A	N/A	N/A	N/A	N/A	x	x	x	x		x	x	x	x	x
3. Life Care Centers of America* Forrest Preston	Cleveland, TN (423) 476-3254 www.lcca.com	30,840	227	N/A	28	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x		x	x
4. Kindred Healthcare Paul Diaz	Louisville, KY (502) 596-7300 www.kindredhealthcare.com	27,523	222	89	27	40	18	42	0	\$4.2 Billion	x	x	x	x		x		x		x
5. Genesis HealthCare Corp.* George Hager Jr.	Kennett Square, PA. (610) 444-6350 www.geneshc.com	25,451	209	N/A	13	31	21	48	0	\$2.3 Billion	x	x	x	x	x	x	x		x	x
6. Sun Healthcare Group Richard Matros	Irvine, CA (949) 255-7100 www.sunh.com	23,205	205	88.1	25	29.5	30.5	40	1	\$1.9 Billion	x	x	x	x	x	x	x			x
7. Sava SeniorCare* Tony Oglesby	Atlanta, GA (770) 829-5100 www.savaseniorcare.com	21,279	184	N/A	19	N/A	N/A	N/A	N/A	N/A	x	x	x			x				
8. Extendicare Timothy Lukenda	Milwaukee, WI (800) 395-5000 www.extendicare.com	16,782	166	88.5	12	33	21	45	1	\$1.3 Billion	x	x	x	x	x	x	x		x	x
9. Evangelical Lutheran Good Samaritan Society + David Horazdovsky	Sioux Falls, SD (605) 362-3100 www.good-sam.com	13,051	184	91	24	8	31	57	4	\$766.7 Million	x	x	x	x	x	x	x	x	x	x
10. National Healthcare Corp. Robert Adams	Murfreesboro, TN (615) 890-2020 www.nhccare.com	9,772	76	92	10	41	30	28	1	\$668.2 Million	x	x	x	x	x	x	x		x	
11. Skilled Healthcare Group Boyd Hendrickson	Foothill Ranch, CA (949) 282-5800 www.skilledhealthcare.com	9,704	78	83.7	7	N/A	N/A	N/A	N/A	\$759.8 Million	x	x		x		x	x	x	x	x
12. The Ensign Group Christopher Christianson	Mission Viejo, CA (949) 487-9500 www.ensigngroup.net	8,376	77	79.4	7	34.6	11.6	40.4	0	\$542 Million	x	x	x	x	x	x			x	x
13. Daybreak Venture* Michael Rich	Denton, TX (940) 387-4388 www.daybreakventure.com	8,085	74	62	1	25	11	64	0	\$249 Million	x	x	x			x	x			x
14. United Health Services* Neil Pruitt Jr.	Norcross, GA (770) 279-6200 www.uhs-pruitt.com	7,934	75	90	4	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x		x	x	x

Ranked by number of beds as of Dec. 31, 2009. U.S. operations only. Percentages may not add up to 100% due to rounding.

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15. Signature HealthCARE* E. Joseph Steier III	Palm Beach Gardens, FL (561) 627-0664 www.signaturehealthcarellc.com	7,738	70	85.4	7	36.6	6.6	48.6	8.2	\$563 Million	x	x	x			x	x	x			x	
16. Petersen Health Care* Mark Petersen	Peoria, IL (309) 691-8113 www.petersenhealthcare.net	7,341	87	76	4	16	17	66	1	\$3.1 Million	x	x	x	x	x	x	x					x
17. Five Star Quality Care Bruce Mackey Jr.	Newton, MA (617) 796-8387 www.fivestarliving.com	6,238	47	86.2	26	N/A	N/A	N/A	N/A	\$1.2 Million	x	x	x	x	x	x	x					
18. American Senior Communities* James Burkhart	Indianapolis, IN (317) 788-2500 www.americanseniorcommunities.com	6,160	45	91	2	35	10	50	5	\$410 Million	x	x	x	x	x	x	x				x	x
19. Advocate William Council III	Brentwood, TN (615) 771-7575 www.diversicaremanagement.com	5,784	50	76.7	8	32.7	12.5	54.8	0	\$302 Million	x	x	x			x	x					
20. Covenant Care* Robert Levin	Aliso Viejo, CA (949) 349-1200 www.covenantcare.com	5,176	46	87	7	37	23	37	3	\$450.6 Million	x	x	x	x		x	x					x
21. Nexion Health Management* Francis Kirley	Sykesville, MD (410) 552-4810 www.nexion-health.com	4,949	40	N/A	3	N/A	N/A	N/A	N/A	\$226 Million	x	x	x			x	x					
22. Alden Management Services* Floyd Schlossberg	Chicago, IL (773) 286-3883 www.thealdennetwork.com	4,652	33	77.5	2	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x	x	x	x	x	x
23. Life Care Services* Ed Kenny	Des Moines, IA (515) 875-4500 www.lcsnet.com	3,927	64	88	26	N/A	N/A	N/A	N/A	N/A	x		x	x	x						x	x
24. Stonegate Senior Care* John Taylor	Lewisville, TX (972) 899-4226 www.stonegateseniorcare.com	3,914	30	85	3	45.1	23.8	30.9	0.2	\$228.6 Million	x	x	x	x	x	x	x					x
25. Benedictine Health System† Dale Thompson	Duluth, MN (218) 786-2370 www.bhshhealth.org	3,743	37	90.2	7	34.7	22.9	42	0.4	\$270 Million	x	x	x	x	x	x	x				x	x
26. Revera Health Systems* Stuart Lindeman	Middletown, CT (860) 347-6300 reverahhealthsystems.com	3,672	30	90	9	33	12	53	2	\$330 Million	x	x	x	x		x	x	x	x			x

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27. Care Initiatives† Miles King	West Des Moines, IA (515) 224-4442 www.careinitiatives.org	3,543	44	81	1	18	33	43	6	\$146 Million	x	x	x	x	x	x	x			x
28. Trilogy Health Services* Randall Bufford	Louisville, KY (502) 412-5847 www.trilogyhs.com	3,489	55	86	5	50	25	23	2	\$430.5 Million	x	x	x	x	x	x	x	x		
29. Brookdale Senior Living William Sheriff	Brentwood, TN (615) 221-2250 www.brookdaleliving.com	3,123	40	N/A	N/A	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x	x		x	x
30. Miller's Health Systems* Patrick Boyle	Warsaw, IN (574) 267-7211 www.millershealthsystems.com	3,000	32	83	1	29	28	42	0	N/A	x	x	x	x	x	x	x		x	x
31. HMR Advantage Health Systems* Michael McBride	Easley, SC (864) 269-3725 www.thelivingadvantage.com	2,958	26	97.5	5	11	9	44	36	\$207.2 Million	x	x	x	x	x	x	x	x		x
32. Horizon West HealthCare* ** Ken McGuire	Rocklin, CA (916) 624-6230 www.horizonwest.com	2,885	27	N/A	2	N/A	N/A	N/A	N/A	N/A	x		x			x				
33. Grace Living Centers* Don Greiner	Oklahoma City, OK (405) 943-1144 www.gracelivingcenters.com	2,693	23	75	1	12	15	65	8	N/A	x	x	x	x		x	x			
34. Avamere Group* Rick Miller	Wilsonville, OR (503) 570-3405 www.avamere.com	2,431	25	87	2	24	20.9	38.7	16.4	\$256.7 Million	x	x	x	x	x	x	x		x	x
35. Athena Health Care Systems* Lawrence Santilli	Southington, CT (860) 628-5514 www.athenahealthcare.com	2,418	18	95.7	2	25	15	58	2	\$232.8 Million	x	x	x			x				x
36. Vetter Health Services* Jack Vetter	Elkhorn, NE (402) 895-3932 www.vetterhealthservices.com	2,407	31	85.7	5	30	47	23	0	N/A	x	x	x	x	x	x	x			x
37. ABCM Corp.* Richard Allbee	Hampton, IA (402) 895-3932 www.abcmcorp.com	2,215	30	N/A	N/A	N/A	N/A	N/A	N/A	N/A	x	x	x	x						
38. The MedLodge Group* Gail Clarkson	Washington, MI (586) 752-5008 www.medlodge.com	2,083	15	83	1	32	15	53	0	\$169.6 Million	x	x	x	x		x	x			

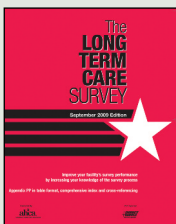


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39. White Oak Manor* Oliver Cecil	Spartanburg, SC (864) 582-7503 www.whiteoakmanor.com	2,008	15	N/A	N/A	N/A	N/A	N/A	N/A	N/A	x	x	x	x	x	x						
40. FutureCare Health and Management Corp.* Gary Altman	Pasadena, MD (410) 766-6484 www.futurecarehealth.com	1,800	11	90	1	N/A	N/A	N/A	N/A	N/A	x	x				x						x
41. Medicalodges* Garen Cox	Coffeyville, KS (620) 251-6700 www.medicalodges.com	1,708	23	79.7	3	N/A	N/A	N/A	N/A	N/A	x	x	x	x		x	x					x
42. Jewish Home Lifecare† Audrey Weiner, DSW	New York, NY (212) 870-5000 www.jewishhome.org	1,630	3	98	1	N/A	N/A	N/A	N/A	N/A	x	x	x		x	x				x	x	x
43. Americare* Clay Crosson	Sikeston, MO (573) 471-1113 www.americareusa.net	1,608	21	N/A	2	40	20	40	0	\$150 Million	x	x	x	x	x	x	x	x				x
44. Crowne Management† Joseph Jones Jr.	Monroeville, AL (251) 743-3609 www.crownemangement.com	1,565	15	N/A	1	N/A	N/A	N/A	N/A	N/A	x	x			x						x	x
45. ElderWood Senior Care* Robert Chur	Williamsville, NY (716) 633-3900 www.elderwood.com	1,492	10	96.5	1	18	20	62	0	\$125.6 Million	x	x	x	x	x	x					x	
46. NewCourtland Elder Services† Gail Kass	Philadelphia, PA (215) 965-1910 www.newcourtland.org	1,440	7	97	1	10	10	80	0	\$100 Million	x	x	x	x	x	x	x	x	x	x	x	x
47. Ecumen† Kathryn Roberts	Shoreview, MN (651) 766-4300 www.ecumen.org	1,362	16	90	1	37	30	31	2	\$72.1 Million	x	x	x	x	x	x	x				x	x
48. NuVision Management* Andrew Weisman	Fort Lauderdale, FL (954) 731-3350 N/A	1,361	9	80	2	18	12	68	2	N/A	x	x	x			x	x					
49. Triad Senior Living* Adam Ashpes	Alpharetta, GA (678) 366-0305 triadsl.com	1,188	10	93	1	N/A	N/A	N/A	N/A	\$70 Million	x	x	x			x	x					
50. Health Concepts* David Ryan	Providence, RI (401) 751-3800 www.healthconceptsld.com	1,092	10	91.7	1	30	11	53	6	\$77.1 Million	x	x	x			x						x



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