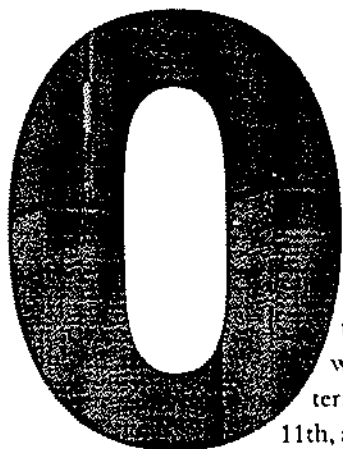


## **Attachments to the Proposal**



**Attachment A**

**UJA-Federation Annual Report and Condensed  
Financial Statement**



**O**UR MEMORIES OF 2001 – 2002 will always be affected by the terrorist attacks on September 11th, and tragic murder of hundreds of innocent Israelis during the ongoing *Intifada*. These horrible events brought out the best in thousands of Americans and Israelis, who unstintingly gave their time, effort, and money to assist victims and survivors. With the catastrophes that dominated the year, many individuals and organizations reflected on their priorities. More and more people came to a realization about what is, and always has been, most important in their lives — family, friends, and community.

In this spirit, UJA-Federation of New York pursued its mission with passion, energy, and commitment. The following report to the community, documents our response to the daunting crises that marked 2001 – 2002. Unprecedented and devastating, these events challenged us to respond. And we did with an outpouring of philanthropic support from the New York Jewish community. During this challenging year, we were also able to formulate plans for future endeavors and develop pilot programs to address emerging needs in New York and overseas.

#### NEW YORK — CRISIS AND OUR UNSTINTING RESPONSE

Acting decisively, within 24 hours of the assault on September 11th, more than 60 executives of UJA-Federation of New York's affiliated agencies mobilized to coordinate vital services and assistance for thousands of New Yorkers. Every institution extended itself in extraordinary ways, providing immediate comfort and human-service relief, and putting in place the mechanisms for ongoing support and counseling.

UJA-Federation took the lead in coordinating services for "direct victims." This integrated approach allowed our network of more than 100 human-service agencies, working with gateway institutions such as JCCs, Ys, Hillels, educational institutions, and synagogues throughout the New York metropolitan area, to provide case management, cash assistance, legal services, employment training and guidance, and mental-health services in a better integrated manner.

Community updates listing available assistance and organizational responses were immediately available through UJA-Federation's website ([www.ujafedny.org](http://www.ujafedny.org)). These were amplified by other communication vehicles, including



**UJA-Federation of New York** pursued its mission with passion, energy, and commitment.

# RES

UJA-Federation's *Leadership Memos, a Directory of Emergency Services* in English and Russian, multiple service-oriented advertisements, and articles in the news media. Thousands of cards were distributed with the telephone numbers of the UJA-Federation Resource Line (1-800-UJAFEDNY-7) and the Russian Advocate Line (1-212-836-1697).

UJA-Federation of New York was also instrumental in the creation of the 9/11 United Services Group (USG), a consortium of 13 major New York City human-services organizations working on the front lines of the September 11th recovery efforts to ensure that the ongoing needs of individuals affected by the World Trade Center attack were met compassionately and efficiently.

Extraordinary in scope and outreach, here is a brief glimpse of the UJA-Federation network's response.

**Board of Jewish Education of Greater New York (BJE):** As the voluntary coordination agency for more than 200 day schools, 200 synagogue schools, and more than 230 early childhood programs throughout Manhattan, Queens, and Nassau County, BJE provided numerous services to its members, including age-appropriate trauma response curricula, workshops, and programs dealing with post-traumatic stress disorder. It collaborated with educators, rabbis, social workers, the school nurses' network, medical facilities, police, and

government officials, and continues to work closely with the Jewish Community Relations Council of New York on school safety and security issues.

**The Educational Alliance:** Within minutes of the terrorist attacks, The Educational Alliance staff transformed their operations into emergency relief centers and shelters for the thousands of people who poured into the streets. The Alliance staff set up impromptu triage stations with the assistance of staff from Cabrini Hospital, Gouverneur Hospital, and Hatzolah, and were out on the street providing people with first aid, oxygen, trauma counseling, water, and food. Social workers continue to offer counseling and support groups. A rabbi continues to work with synagogues south of 14th Street to help the community move through a range of spiritual, psychosocial, and educational services.

**F.E.G.S.:** This large, diversified provider of human services, helped its clients through outreach, crisis counseling, bereavement information, public education, stress debriefings, career counseling, employment assistance, and related services. The agency's network of services in New York City and throughout Long Island provided information and direct assistance to more than 135,000 individuals affected by the events of September 11th. Its Back-to-Business Link service met an overwhelming demand for employment services.

# Shelter

Many centers provided daycare services to families and emergency shelter to police and emergency personnel.

**Holocaust Survivors: DOROT, Jewish Association for Services for the Aged, Jewish Community Centers, and Selfhelp Community Services** — human-service agencies in our network — assisted with specialized expertise. More than 2,500 survivors, many fragile elderly, received trauma support, caring, and disaster-preparedness tools and training.

**Jewish Association for Services for the Aged (JASA):** At its 26 centers, JASA offered seniors direct human-service assistance, Glatt kosher meals, financial aid, and in-home visits as well. JASA worked with the **Hebrew Educational Society (HES)** to provide grief counseling to the elderly. In the immediate aftermath of 9/11, HES provided shelter for local police and emergency personnel.

**Jewish Board of Family and Children's Services (JBFCs):** Helping thousands of members of the community, JBFCs provided an extremely broad range of tragedy-response services to children, parents, seniors, émigrés, and employees of affected companies. JBFCs sent more than 200 trauma teams to brokerage houses and other businesses and institutions in the downtown area requiring tragedy-response support. JBFCs built on its relationships with public, private, and nursery

schools for comprehensive teacher training, support groups, and grief counseling.

**Jewish Child Care Association of New York (JCCA):** JCCA was selected as one of two organizations to be part of the Permanency Project, providing emergency services to 100 children who have lost parents and primary caregivers. This project gives those now raising the children access to legal services, permanency planning, benefits assistance, emergency aid, counseling, and linkage to health care and other services. Building on long experience working with foster and adoptive families, JCCA brought expertise to families in need.

**Jewish Community Relations Council of New York (JCRC):** JCRC engaged in a broad range of activities with national, regional, and local leaders, including sessions on Capitol Hill; meetings with New York State and City leadership; FEMA; police, health, and rescue workers; and with UJA-Federation's network of human-service agencies and gateway institutions. The JCRC Commission on Intergroup Relations worked with diverse ethnic and religious groups, including Muslim and Arab groups, and published a *Statement Against Terror and Hate*, signed by more than 350 agencies and representatives of all faiths, in many newspapers.



**Jewish Community Centers and YM-YWHAs:** JCCs and Ys across the metropolitan area worked with their memberships and with other organizations in their local neighborhoods to develop numerous support programs to provide assistance and coping strategies, including trauma, grief, and mental-health counseling, and workshops for families, individuals, and children. Many centers provided daycare services to families and emergency shelter to police and emergency personnel during the tragedy.

**Metropolitan Council on Jewish Poverty:** Met Council provided a broad range of services for victims, including more than \$1.4 million in financial assistance to some 1,000 households, as well as career counseling, job referrals, and help accessing benefits to an additional 4,400 people. Met Council mounted a major effort to reach out to 24 Jewish community councils and community-based organizations to inform them of the availability of counseling, financial assistance, and other services to 9/11 victims. The **Hebrew Free Loan Society** provided emergency loans of up to \$5,000 to those affected by the attacks.

**New York Association for New Americans (NYANA):** NYANA assisted displaced small-business owners from all of the metropolitan area's immigrant groups with strategies for applying for

loans to rebuild their businesses, relocate, and develop new businesses in the wake of 9/11.

**New York Board of Rabbis:** More than 750 interdenominational rabbis were on call for pastoral support for their congregations, area hospitals, and countless organizations from the police and fire departments to American Red Cross Respite Centers and the Family Assistance Center. The rabbis functioned as chaplains for many firms that suffered devastating losses, offered solace to families searching for their loved ones, and provided Jewish burial and bereavement services. They also provided counseling and spiritual guidance, and were a visible presence at numerous services, memorial tributes, and candlelight vigils for the Jewish and interdenominational communities.

**New York Legal Assistance Group (NYLAG):** NYLAG provided more than 2,200 individuals with legal case assistance in the first six months following 9/11. NYLAG offered extensive legal representation to the surviving family members of 217 victims. The broad range of legal needs NYLAG addressed included assistance with accessing emergency entitlements, family and immigration law issues, and identifying second-generation victims who lost jobs and needed government assistance.

# Dignity

**Opening new avenues of service for many people with significant needs who have been reluctant to ask for help.**

**Russian Community Support:** Lacking the support of a family and community infrastructure, recent émigrés were especially vulnerable. Almost 80 families in the Russian-Jewish community, many of them including frail seniors, lost relatives, jobs, and businesses. UJA-Federation assisted them by establishing a Russian Advocate Line telephone hotline, staffed by Russian speakers, with personal case-mangers to connect callers to our network agencies.

**Suffolk Association for Jewish Educational Services (SAJES):** SAJES served as an information clearinghouse for Jewish schools in Suffolk County, offering support to educators.

**Westchester Jewish Community Services (WJCS):** Immediately following the World Trade Center attacks, WJCS mobilized to relocate 70 seniors — many of whom were Holocaust survivors suffering flashbacks triggered by the attack — from Battery Park City to the Hyatt Classic, a retirement residence in Yonkers. More than 150 parents attended *Helping Children Deal with the Tragedy*, crisis workshops led by WJCS and facilitated by UJA-Federation at three Westchester Jewish community centers: the JCC of Mid-Westchester, the JCC on the Hudson, and the Richard G. Rosenthal Jewish Community Center of Northern Westchester.

## **NEW YORK — OUR COMMUNITY POST-9/11**

While UJA-Federation, together with its network of agencies, was responding to the crises of the past year, our organization was also sustaining its commitment to ongoing initiatives. We strengthened our unparalleled network of agencies, accomplished critical planning for future endeavors in all areas of our mission, and initiated programs to address emerging needs in New York and overseas. These outstanding initiatives include:

**Partners in Care:** Opening new avenues of service for many people with significant needs who have been reluctant to ask for help, UJA-Federation developed a new model of integrated service called *Partners in Care*. This collaborative community initiative stations social workers from human-service agencies at Jewish community centers and synagogues and assigns rabbinic interns to social-service, health, and eldercare agencies.

**Naturally Occurring Retirement Communities (NORCs):** A pioneer in the creation of on-site services to the elderly, UJA-Federation recognized the need to assist the more than 360,000 senior adults who have "aged in place" in New York City's large housing





developments since the 1950s, '60s, and '70s. Started with a small grant about 15 years ago, in 2001 – 2002, UJA-Federation continued to address the needs of tens of thousands of seniors in these NORCs, supporting the ability of seniors to remain in their own homes as they age and become frail. Nationally recognized and replicated as an innovative service model, UJA-Federation network agencies serve as social-service providers in 16 of the 28 NORC-service sites in New York City.

**Jewish Renewal:** Dedicated to strengthening Jewish life, our organization continued a dramatic initiative to foster Jewish renewal. UJA-Federation's investment in *Synagogues for the Future*, applies the principles of change management to enhance and transform the synagogue experience. Two years ago, UJA-Federation selected 21 synagogues in Westchester County to participate in this four-year pilot program, working with *Synagogues 2000*, a national organization. The geographic concentration has facilitated the work of building a cross-denominational community of congregations that can be mutually reinforcing as they grapple with institutional change.

**Tomorrow's Jewish Community:** Over the last year, the task of ensuring communal continuity through the education of the younger generation remained a central and serious challenge for the Jewish community, which constitutes a small minority in America's diverse and dynamic society. Working to foster a Jewish renaissance in New York, strategic initiatives include programs to engage youth and young adults, strengthen congregational schools, expand opportunities for adult Jewish learning, provide Jewish education and outreach to émigrés, and to strengthen professional recruitment and retention.

In Israel, *Shdemot* (the Hebrew word for "fields") has been developed to combine Jewish identity building with community building. This innovative project involves the 14,000 residents of Kiryat Tivon, where a team of experienced education professionals is working in conjunction with Tivon's elected leadership, public officials, and representatives of all the major civic and educational institutions. The crucial feature of this project is volunteerism and the empowerment of leadership in creating a template of social, cultural, educational, and environmental activities that will shape Tivon's character and future.

# Healing

**Our support provided an effective, immediate response to victims of terrorism and their families.**

## **ISRAEL — OUR UNWAVERING SUPPORT**

Linked inextricably by common interests, reciprocal responsibilities, and a sense of joint destiny, the people of Israel and the New York Jewish community experienced the fragility and uncertainty of life last year. Both were ravaged by terrorism, yet our bond remained unbreakable.

Actively supporting the Israeli people as they continued to resist violence and pursue peace, UJA-Federation demonstrated its resolve with a continuum of activities to inform, educate, and involve the New York Jewish community. We organized missions, rallied locally and in Washington, D.C., provided educational programs, and raised funds for those affected by the ongoing terrorist attacks.

Through *Standing with Israel: The Israel Emergency Fund (IEF)*, UJA-Federation raised significant funds to meet the immediate needs of Israeli victims feeling the overwhelming impact of terrorism. In an historic breakfast meeting, chaired by Laurence A. Tisch and Morris W. Offit, New York's Jewish leaderships donated over \$15 million to the IEF. This substantial support was matched three days later by a reception, which raised an additional \$3 million for the Israel Emergency Fund.

Together with federated communities across North America, our support provided an effective, immediate response to victims of terrorism and their families in Israel, proving direct aid and trauma relief through our overseas partners, the **Jewish Agency for Israel (JAFI)** and the **American Jewish Joint Distribution Committee (JDC)**. To permit "life as usual" for Israeli children during this intensely anxious year, UJA-Federation established after-school and summer camping programs, and expanded school-based and community center programming through projects such as these:

**Fund for the Victims of Terrorism:** This fund, administered by JAFI, provided direct cash assistance to more than 320 families directly affected by terrorist attacks, reaching more than 1,300 people. An overwhelming majority of the victims came from the central part of the country, reflecting the concentration of many terrorist attacks. Unfortunately, a disproportionate number of these survivors were from Israel's poorest segment — financially vulnerable Israelis who were more likely to use public transportation. Direct grants assisted this population with critical recuperation concerns such as mental and physical health, security, and the resumption of daily living.



**"Keeping the Children Safe" — Summer Camps:** This program enabled more than 250,000 children to enjoy three weeks in a safe and secure environment. With their children protected in a secure summer camp, more than half a million parents were able to go to work with less anxiety about their children. Through our Israel emergency efforts, 37,000 youth from the most vulnerable populations, including children at risk, immigrant children, and children with disabilities, also participated in special programs.

**School Safety:** Funds were put in place so that, over 2002 – 2004 period, security guards will be provided for Israel's more than 3,200 schools. This program was designed to cover schools with 100 or more students, as well as for smaller educational institutions that could not otherwise function without this protection, such as preschools, kindergartens, and daycare centers.

Through the formation of the **Israel Trauma Coalition**, comprised of seven of these agencies, UJA-Federation established a coordinated national system of service delivery in Israel. The **Israel Center for Treatment of Psychotrauma**, the coalition's lead agency, worked intensively to train teachers, community center staff, and emergency personnel in trauma and post-trauma treatment skills. The **Israel Crisis Management Center**

(known as *Selah* in Hebrew), a network of 600 volunteers, reached out to victims of terrorism and their families whose lives have been shattered by violent attacks and other crises.

#### ISRAEL — CONTINUING OUR WORK

New immigrants from Argentina to Israel in 2001 – 2002 numbered more than 4,100, with many spending their initial months in absorption centers. Through the Jewish Agency for Israel's *Aliyah 2000* programs, many were able to go to specialized communities, including Kiryat Bialik, Migdal Ha'emek, and Beersheva.

These Argentine *olim* joined 21,600 new émigrés from the former Soviet Union, 3,000 from Ethiopia, 1,700 from France, and 1,500 from the United States — demonstrating the surprisingly firm determination of people from every part of the globe to build a new life in Israel, even in very difficult times.

In addition to the terrorism of the *Intifida* in 2001 – 2002, Israel faced a substantial humanitarian and social challenge, integrating Ethiopian *olim* into Israeli society to avert the creation of a permanent underclass. Recognizing that Rehovot, with an Ethiopian population of 6,000, including 1,000

# Com

We continued to assist those in dire poverty, and helped to renew Jewish life and rebuild the Jewish community.

children under the age of six, had become Israel's second-largest Ethiopian community, UJA-Federation worked with the city and JDC-Israel to launch **Parents and Children Together (PACT)**. An early-education program providing every youngster in the city with a pre-school education, PACT narrows the educational gap between Ethiopian children and their native Israeli peers, and gives their families access to home-based parenting support, literacy classes, and other resources in the community, such as medical and dental clinics and arts programs.

More broadly, UJA-Federation plays a key role throughout Israel in helping thousands of Israelis overcome poverty, fight illiteracy, cope with domestic violence, and deal with the effects of aging. For all its success over 54 years, Israel has always been at some level, a society under stress. One of the markers of this stress, in addition to the *Intifada*, is that 330,000 of Israel's children are neglected, alienated, abused, or otherwise at risk.

**Ashalim**, a binational partnership of UJA-Federation of New York, JDC-Israel, and the Israeli government, is a special initiative designed to address and re-engineer the entire system of services for Israel's children at risk, through joint planning and grant making. Today, through this collaborative partnership, in 18 centers around the country,

*Ashalim* and local social-services agencies are helping families whose children, ages 5 to 12, suffer from emotional, behavioral, functional, or social problems.

## ARGENTINA —

### SUPPORTING A COMMUNITY IN PERIL

Struggling with the effects of a devastating economic collapse, the more than 220,000 people in the Jewish community of Argentina experienced a bitterly hard time in 2001 – 2002. Following violent acts of anti-Semitism several years earlier that destroyed both the Israeli Embassy and a social service center that had served as the hub of Jewish life for nearly half a century, Argentine Jews witnessed the daily deterioration of their country's economy and political system.

Families that had been prosperous only a year before fought hunger and faced the prospect of losing their homes. As many as 1,700 Jews slept in makeshift shelters or under bridges. At least 26,000 formerly middle-class Jews struggled to survive as the number of Argentine Jews living below the poverty line rose to nearly 50 percent.

UJA-Federation worked through JDC to provide the community with emergency humanitarian assistance — food, clothing, medicine, and shelter — and to create more than 40 welfare centers for



ongoing support. Psychological counseling was also provided, and employment centers were established to help find work for the unemployed and to retrain those whose skills were no longer useful in the ruins of the economy. In addition, JDC worked to help preserve the culture of a once-vibrant Jewish community so that mechanisms for revitalization will be in place as the economy recovers.

Many Argentine Jews chose not to stay in the country. Through JAFI, more than 4,100 Argentine Jews made aliyah. JAFI rapidly processed immigration applications in Argentina and prepared local communities in Israel for the direct absorption of Argentine *olim*.

#### **WORLDWIDE COMMUNITIES — HONORING OUR GLOBAL RESPONSIBILITIES**

In addition to the grave economic crisis in Argentina, several overseas communities faced severe difficulties in 2001 – 2002. In Ethiopia, we worked through our global partners — JDC and JAFI — to address nutritional and medical deficiencies. We supported medical clinics in Addis Ababa and Gondar, and offered special programs for feeding the elderly and disabled, as well as food for families of malnourished children.

In the former Soviet Union, we continued to assist those in dire poverty, and helped to renew Jewish life and rebuild the Jewish community. Of particular note were grants to seven Jewish orphanages in Russia, Ukraine, and Kazakhstan; to *Channah*, a feeding program for the elderly in Moscow; to community centers in Moscow; and to summer and winter camps in Moscow and Minsk that promote a connection to the Jewish people and stimulate aliyah. Other notable grants funded Jewish education and identity programs, including those of the Aleph Society, ORT, Jewish University of Moscow, ARZA outreach, JTS Project Judaica, Hillel, and JAFI.

#### **PHILANTHROPY — AN UNPARALLELED EXPRESSION OF COLLECTIVE JEWISH RESPONSIBILITY**

UJA-Federation of New York annual campaign raised a record \$167 million, including special campaigns.

In this past year, a time plagued by disaster, governmental budget cutbacks, and serious economic decline, UJA-Federation experienced an outpouring of support for four special campaigns — the Terrorism Response Fund, which aided victims of 9/11; the Israel NOW Solidarity Fund, which was combined with the Standing with Israel: The Israel



# Hope.

**UJA-Federation remains firm in its resolve to strengthen the Jewish community in New York, in Israel, and around the globe.**

Emergency Fund; and a special campaign for Argentina's Jewish community. These campaigns helped increase our donor base to 88,318 — an outstanding communal response.

These philanthropic accomplishments reflect the commitment and tireless dedication of UJA-Federation leadership. Thousands of volunteers and professionals, working together to strengthen our Jewish community, demonstrated the truest expression of *tzedakah* — benevolence and generosity, and magnanimous acts of kindness.

Leading off the annual campaign, September's Greenberg Event raised \$32 million from 140 donors. In December, the Wall Street Dinner, featuring New York's newly elected Mayor Michael Bloomberg, raised \$19 million from an audience of 1,200 people, and in November, 300 women participated in our Lion of Judah luncheon, raising over \$5 million. And during one 48-hour period in May, we hosted three substantial and successful events — the Bankruptcy Lawyers Luncheon, attended by 700 guests; and the Publishing Dinner, an outstanding evening with more than 800 in attendance; (and an Israel Emergency Fund gathering at Bear Sterns with 400 attendees.

On April 10th, we saw the finest expression of philanthropy at our Keepers of the Flame Dinner honoring Peggy Tishman, former UJA-Federation president, and Stephen Solender, former executive vice president of the organization. The event brought together leadership from across the country in a heartfelt demonstration of affection and generosity — a tribute to the honorees' outstanding volunteer and professional achievements on behalf of the Jewish community.

New York City's outstanding philanthropic institutions also made significant contributions to the successes of 2001 – 2002 — United Way of America, the Jewish Communal Fund, and The New York Times Foundation, sponsor of The New York Times Neediest Cases Fund. UJA-Federation wishes to recognize and thank them for their outstanding leadership and generous commitment to helping those devastated by 9/11, and for their ongoing dedication to helping those in need.

A note of caution: despite the tremendous efforts of the past year, our unrestricted annual campaign funds were actually down by \$4.4 million, due in part to generous giving to special 9/11 and Israel emergency funds. However, we continue to focus on a strong annual campaign — to build deeper relationships with our donor population and to reach out to new audiences, particularly younger members of the Jewish community.



### OUR COMMUNITY — OUR PEOPLE

Looking ahead, although constrained by forces beyond our control, UJA-Federation remains firm in its resolve to strengthen the Jewish community in New York, in Israel, and around the globe. Through our network and beyond, we are committed to creating caring, compelling, and connected communities of meaning and purpose, and to expressing solidarity and support for the people of Israel.

In these post-9/11 days, we face painful adjustments and belt-tightening that we anticipate will impact directly on our ability to assist frail populations and strengthen our community. Rising insurance costs, cuts in government spending, a declining economy, and rising unemployment in New York

and Israel have prompted UJA-Federation to trim its administrative budget and reduce staff. In fact, our administrative expenses in 2001 – 2002 were 6.4 percent less than the previous year. As an organization, we continue to explore opportunities to increase productivity, effectiveness, and efficiency so that we can fulfill our mission, our vision, and our goals.

In 2001 – 2002, none of our work could have been accomplished without the extensive involvement of thousands of dedicated volunteers and a talented staff, who spent countless hours working in all areas of our UJA-Federation system — and simultaneously coped with difficult economic times and the devastation of 9/11. We salute these everyday heroes for their constant caring, their extraordinary passion, and their generous support.



Larry Zicklin



Morris W. Offit



John S. Rusky

13

**2002 FINANCIAL RESOURCE DEVELOPMENT RESULTS**

(dollars in millions)

<b>Pledges to the Annual Campaign &amp; Other Annual Giving Pledges</b>	<b>119.2</b>	<b>10.8</b>	<b>130.0</b>
<b>Pledges to Emergency Campaigns Israel and Argentina</b>	<b>34.7</b>		
<b>9/11 &amp; New York Terrorism</b>	<b>8.5</b>		<b>43.2</b>
<b>Planned Giving and Endowments</b> (gross receipts, including supporting foundations)			<b>37.4</b>
<b>Capital Development and Special Initiatives</b> (pledges, including gifts arranged on behalf of beneficiary agencies*)			<b>7.0</b>
* Donors to the annual campaign also pledged an additional \$33.8 million directly to beneficiary agencies for Capital projects.			
<b>FUNDRAISING EXPENSES AS PERCENT OF REVENUE</b> (including amounts raised on behalf of others)			<b>13.5%</b>

**APPROPRIATIONS**

**To care for those need .....38%**

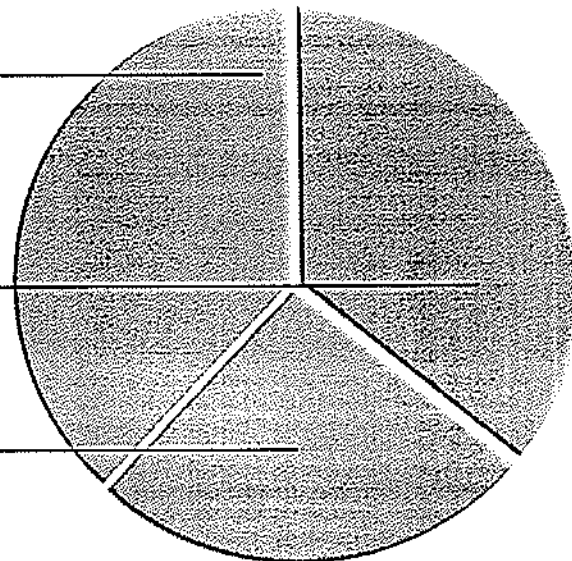
- Ensuring safety net for the vulnerable
- Enabling hospice and end-of-life care
- Promoting self-sufficiency
- Inspiring volunteerism
- Strengthening families
- Assisting older adults to age in place

**strengthen Jewish peoplehood .....36%**

- Guaranteeing rescue and security
- Integrating olim and émigrés
- Strengthening Jewish bonds
- Promoting unity in diverse Jewish communities

**and foster Jewish renaissance .....26%**

- Promoting Jewish education
- Cultivating and sustaining Jewish identity
- Building inspired Jewish communities
- Fostering Jewish learning



**in New York, in Israel, and around the world.**



**UNITED JEWISH APPEAL FEDERATION OF JEWISH PHILANTHROPIES OF NEW YORK, INC.**

**Condensed Balance Sheet**

**June 30, 2002**  
**(dollars in thousands)**

**Assets**

Cash	5,557
Contributions receivable, net	75,903
Other assets and receivables	27,450
Amounts held on behalf of other agencies	15,889
Investments	527,708
Assets held under charitable trust agreements	49,796
Fixed assets, net	9,802
	<hr/>
Total assets	712,105
	<hr/> <hr/>

**Liabilities and net assets**

Liabilities:

Accounts payable, accrued expenses, and other liabilities	17,577
Grants payable	19,696
Amounts held on behalf of other agencies	15,889
Liabilities under charitable trust and annuity agreements	50,713
Accrued postretirement benefits	6,443
	<hr/>
Total liabilities	110,318
	<hr/>

Net assets:

Unrestricted (including Board designated of 192,680)	291,001
Temporarily restricted	144,698
Permanently restricted	166,088
	<hr/>
Total net assets	601,787
	<hr/>
Total liabilities and net assets	712,105
	<hr/> <hr/>

**UNITED JEWISH APPEAL FEDERATION OF JEWISH PHILANTHROPIES OF NEW YORK, INC.**

**Condensed Statement of Activities**

**Year ended June 30, 2002**  
**(dollars in thousands)**

**Revenues and gains:**

Net contributions - annual giving	170,622
Endowment contributions, legacies, and bequests	30,609
Split-interest agreements [net of change in value of (4,029)]	(2,234)
Donated services	350
Amounts raised on behalf of others	<u>13,464</u>
Net campaign revenues, including amounts raised on behalf of others	212,811
Less: amounts raised on behalf of others	<u>(13,464)</u>
Net campaign revenues, excluding amounts raised on behalf of others	<u>199,347</u>
Net investment income	7,949
Net depreciation in fair value of investments	(5,178)
Rental, service, and other income and gains	<u>16,740</u>
Total revenues and gains	<u>218,858</u>

**Distributions, allocations, grants, and expenses:**

Grants and program services	147,673
Fundraising	28,723
Management and general	<u>15,000</u>
Total expenses	<u>191,396</u>
Increase in net assets	<u><u>27,462</u></u>

**Report to the Community 2001 – 2002**  
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For additional copies of  
*Report to the Community 2001 – 2002*,  
please call 1.212.836.1765 or access our website —  
[www.ujafedny.org](http://www.ujafedny.org) — you can view and download  
a copy of this report.

#### **The UJA-Federation Resource Line**

For information or assistance,  
e-mail [resource@ujafedny.org](mailto:resource@ujafedny.org) or call:

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#### **Our Mission**

To care for those in need, strengthen Jewish peoplehood,  
and foster Jewish renaissance in New York, in Israel,  
and throughout the world.

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Loren Spivack*Missions Director*  
Maidelle Goodman  
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Joan Bronk*Special Gifts  
Assistant Executive  
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Special Initiatives  
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Vicki Compter*Special Gifts Director*  
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Romie Horn*Research & Development  
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Director*  
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Chief Information Officer*  
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Bea DeVito*Technology Support  
Director*  
Shawn Arana*Real Estate Services  
Director*  
Christine Flynn*59th Street Building  
Director*  
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Deputy Managing Director*  
Jill Mendelton*Organizational Review  
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Jane Abraham*Commission Management  
and Budget Office  
Executive Director*  
Arthur Sandman*Director of Financial  
Management and  
Evaluation*  
Larry Feinstein*Deputy Director*  
Larry Silverman*Foundation Services  
Executive Director*  
Lauren Katzowitz*Government and  
External Relations  
Managing Director*  
Ronald Soloway*Deputy Managing  
Director Resource  
Development*  
Anita Altman*City Policy Director*  
Daniel Rosenthal*Housing Director*  
Joanne Hoffman*External Affairs  
Director*  
Caroline Katz*Israel Office Director*  
Stephen Donshik**Office of the  
Vice President for  
Strategic Planning  
and Organizational  
Resources***Caring Commission  
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Roberta Leiner*Planning Directors*  
Shelley Horwitz  
Simha Rosenberg*Medical and Geriatric  
Program  
Executive Director*  
Robert Wolf*Commission on Jewish  
Identity and Renewal  
Managing Director*  
Rabbi Deborah Joselow*Planning Director*  
Jennifer Rosenberg*Commission on the Jewish  
People Managing Director*  
Gary Rubin*Deputy Managing Director*  
Michael Greenberg*Program Director*  
Boris Kerdiman*Department of  
Educational  
Resources and  
Organizational  
Development  
Executive Director*  
Wiener Center Director  
Lyn Light Geller*Jewish Resource Center  
Director*  
Rabbi Lori Forman*Executive Director,  
Synagogue and  
Community Affairs;  
Director, Jewish  
Resource Center*  
Rabbi Michael Paley*Educational Resources  
Director*  
June Fortess**Marketing and  
Communications***Executive Director*  
Marcia P. Neeley*Marketing Director*  
Robert G. Rosenthal*Communications Director*  
Laurie Pine*Campaign Marketing  
Director*  
Barbara Schreiberman*Interactive Services Director*  
Suzanne Buller*Art Director*  
Michael J. LoSardo*Business Operations  
Director*  
Robert S. Gorin**Volunteer and  
Leadership  
Development***Executive Director*  
Ruth Avrin**Office of the President***Executive Director*  
Sheila Romanowitz**Office of the  
Chief Financial Officer***Controller*  
Lawrence Swilling*Assistant Controller*  
Ralph Guida  
JoAnn LoCascio*Director of Accounting*  
Alan Rosenthal*Director*  
Geoff Koonin

*Women's Business and Professional Division*  
Pamela Averick  
Robin Berkelhammer  
Lori Rubinson

*Young Leadership Cabinet*  
Tracy Makow  
David Solomons

*Young Leadership Council*  
Chad Shandler  
Anna Winderbaum

**Caring Commission**

*Chair*  
Judy Baron

*Planning Chairs*  
Cathy Chazen  
Michael Lippman

*Health Care Fund*  
Barbara Friedman

*Task Force on Aging*  
Cheryl Fishbein

*Children, Youth & Families Task Force*  
Nancy Hirschtritt

*Breast and Ovarian Cancer Task Force*  
Enid Howard

*Grants Committee*  
Jesse Krasnow

*Jewish Hospice and End of Life Care Task Force*  
Paul Kronish

*AIDS Initiative Task Force*  
Elizabeth Sarnoff Cohen

*Task Force on Poverty and Community Development*  
Fredric Yerman

*Neighborhood Improvement*  
Myra Miller Zuckerbraun

**Commission on Jewish Identity and Renewal (CoJIR)**

*Chair*  
Marion Blumenthal

*Adult Jewish Learning Task Force*  
Mimi Alperin

*Congregational Education Task Force*  
Scott Shay

*Fund for Jewish Education Outreach and Special Projects*  
Judith Stern Peck

*Grants Renewal and Oversight Workgroup (G.R.O.W) Domestic*  
Carol Spinner

*Grants Renewal and Oversight Workgroup (G.R.O.W) Overseas*  
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*Grinspoon-Steinhardt Awards*  
Floy Kaminski

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Sanford Antignus  
Susan K. Stern

*Israel Experience Workgroup*  
Karen Radkowsky

*Professional Development Task Force*  
Carol Auerbach  
Temma Kingsley

*Youth & Young Adults Task Force*  
Alisa Doctoroff  
Robyn Tsesansky

*Synagogues for the Future*  
Susan K. Stern

**Commission on the Jewish People (COJP)**

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Ruth Horowitz  
Philip Schatten

*Grants*  
Liz Jaffe

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Barry Effron  
Liz Jaffe

*Planning and Grants Committee on FSU-Related Issues Chairs*  
Geoffrey Chinn  
Howard Rubin

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Evelyn Keivin

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Louis Gross

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John Usdan

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Ronald G. Weiner

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Bobi Klotz  
Stephen Reiner

*Technical Assistance and Organizational Services*  
Harvey E. Benjamin

*Network Council*  
Billie Gold

**Executive and Senior Staff**  
(as of December 1, 2001)

**Office of the Chief Executive Officer**

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Paul Kane

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*Vice President for Agency and External Relations*  
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*Connections Director*  
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*Rockland Campaign Campaign Director*  
Jonathan Feldstein

*Westchester Campaign Regional Director*  
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*New York Metropolitan Campaign Director*  
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Roni Krimky

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Mindy Rubin

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*Wall Street Campaign Director*  
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*Special Projects Director*  
Jack B. Baer

**Women's Campaign**

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Andrea Barchas

*Director*  
Judith Stecklow

*FRD Systems Director*  
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*New Media Director*  
Randy Newman

*Jewish Leadership Forum Director*  
Laura Spitzer

**UJA-Federation  
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Chairs  
2001 - 2002**

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Paul J. Konigsberg

*Building Art*  
Ellen Shapiro

*Data Processing*  
Stanley Adelman

*Finance*  
Ronald Grossman

*Investment*  
J. Ezra Metkin

*Marketing*  
Morris W. Offit

*2002 New York Jewish  
Population Study Chairs*  
Judah Gribetz  
Nicki Tanner

*Nominating for Board*  
Billie Gold

*Nominating for Officers*  
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Arthur Rubenstein

*Technical Assistance  
& Organizational Services*  
Harvey E. Benjamin

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Susan K. Stern

*Special Gifts*  
Jerry W. Levin

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Joan Ginsburg

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Steven M. Boden

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*Apparel Division*  
Sy Blechman

*Banking & Finance  
Division*

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Klara Silverstein

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Richard Kalikow  
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Erika Witover

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## UJA-Federation of New York Leadership 2001 – 2002

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Annette Kasle  
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Bobi Klotz  
Lynne Koeppl  
Paul J. Konigsberg  
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Herbert Kronish  
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Diane Wohl  
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Arthur Zankel  
Larry Zicklin  
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\* Executive Committee  
\*\* Deceased

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Merryl H. Tisch  
*Executive Director*  
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Michael J. Waldman  
*Executive Director*  
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Maida Silver  
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*Executive Director*  
Eliot G. Spack

**The Hillels of New York**  
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*Associate Vice President*  
Robert Lichtman

**Suffolk Association for Jewish Educational Services**  
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*Executive Director*  
Deborah Friedman

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**Beth Israel Medical Center The Herbert & Nell Singer Division**

**Beth Israel Medical Center Kings Highway Division**

**D•O•C•S**

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**Phillips Ambulatory Care Center**

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**Mount Sinai Medical Center**  
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**Long Island Jewish Medical Center**  
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**Hillside Hospital**

**Long Island Jewish Hospital**

**Schneider Children's Hospital**

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Bjorn Bamberger  
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Shana Novick

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CHILDREN AND ADULTS**

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for the Creative  
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**COMMUNITY CENTERS**

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Division of the  
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**Attachment B**  
**Overall Needs Calculation**

## **Attachment B: Overall Needs Calculation**

- 1. Financial Assistance: Impact of Housing Costs on Meeting Basic Needs.** In light of the severe housing crisis in the New York Area, Selfhelp Community Services, Inc. ("Selfhelp"), the largest provider of services to Nazi victims in North America, recently surveyed its caseload in New York City in order to estimate the number of Nazi victims who need rental assistance, if a severe impact upon meeting such basic needs as food and clothing is to be avoided. The criteria used to determine who was in need of rental assistance were the following: (1) that a household had less than \$20,000 in assets and (2) that rent payments are either (a) more than 50% of monthly income or (b) more than 30% of monthly income combined with significant medical or other critical expenses that make managing on a monthly basis difficult. Based on its survey, Selfhelp estimates that approximately 35% of New York Area victims (19,130 people in 12,626 households) are in need of ongoing rental assistance (using the criteria set forth above). Selfhelp also determined that the average monthly subsidy needed by these households to make their monthly rents is between \$280 and \$320. Based on the Selfhelp data, the total annual subsidy that would be required to meet the financial assistance needs of New York Area victims would be approximately \$45,453,600 (12,626 households x \$300 per month x 12 months). (Note: This Proposal does not suggest that a rent subsidization program is appropriate for allocation from the Pool. The Proposal suggests financial assistance to meet basic needs because housing costs in the New York Area have a disproportionate impact upon the budgets of victims.)
- 2. Outreach, Case Management and Entitlement Counseling.** Through its Nazi Victim Services Program, Selfhelp has been a mainstay in providing individual New York Area Nazi victims with counseling, information and referral, advocacy, housekeeping and homecare, holiday, group and social programs, financial management and guardianship, and emergency cash assistance. Based upon its total year-2002 program cost (\$3,539,138) and the number of victims served (2,699), Selfhelp estimates that the annual per client cost of providing individualized case management and related programs was \$1,311. Assuming that only 20% of the estimated 34,200 poor and near-poor New York Area victims will require combined outreach, case-management and entitlement counseling services, the total annual cost of providing these services in 2004-2005 (adjusted for inflation) would be \$9,749,762.
- 3. Homecare Assistance and Advocacy.** Selfhelp has estimated that a comprehensive advocacy and service program specifically focused on supplementing and procuring Medicaid benefits through the use of social workers, nurses and attorneys, would cost an average of \$11,300 per case. Selfhelp has also estimated that, over a 7-year period, 7,488 individuals would likely utilize the program. The total 7-year cost would be \$84,681,792, or \$12,097,398 million per year.

**TOTAL ANNUAL COST: \$67,300,760**



**Attachment C**

**Estimate of Poor and Near-Poor Victims  
Residing in the New York Area**

## **Attachment C: Estimate of Poor and Near-Poor Victims Residing in the New York Area**

1. There are an estimated 687,900 Jewish victims of Nazi persecution in the world today. Of these, approximately 109,900 reside in the U.S.<sup>1</sup>
2. The estimated population of Nazi victims in the New York area is 55,000.<sup>2</sup> They comprise half of the total estimated population of Nazi victims in the U.S., and 7.99% of the population of Jewish victims of Nazi persecution worldwide.
3. Approximately 427,900 Nazi victims around the world are poor or near-poor.<sup>3</sup> Approximately 53,200 of these people reside in the U.S.<sup>4</sup>
4. Of the Nazi victims residing in the New York area, 34,200 are poor or near-poor,<sup>5</sup> (including 21,000 who live on incomes below 100% of U.S. federal poverty guidelines – fully 70% of all 29,700 Nazi victims living in the U.S.<sup>6</sup> who live below the poverty line). This population represents 64.3% of all poor and near-poor Nazi victims in the U.S., and 7.99% of the worldwide population of Nazi victims who are poor or near-poor.

Based on the above figures, we respectfully suggest that 7.99% of the Swiss Banks Residual Assets distribution represents a proportional share to provide humanitarian assistance to the 34,200 poor and near-poor Nazi victims residing in the New York area.

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<sup>1</sup> Source: An Estimate of the Current Distribution of Jewish Victims of Nazi Persecution, prepared by Ukeles Associates for the International Commission on Holocaust Era Insurance Claims (ICHEIC), October 2003.

<sup>2</sup> Source: The Jewish Community Study of New York: 2002.

<sup>3</sup> Source: A Plan for Allocating Successor Organization Resources. (Exhibit 4). (Conference on Jewish Material Claims Against Germany, June 2000) estimated that poor and near-poor people were 62.2% of the worldwide Nazi victim population. Applying this rate of poverty and near-poverty to the 2003 updated ICHEIC estimate of a population of 687,900 Nazi victims worldwide, we estimate that there are approximately 427,900 poor and near-poor Nazi victims in the world today.

<sup>4</sup> Source: National Jewish Population Survey 2000-2001 (Table 1).

<sup>5</sup> Source: The Jewish Community Study of New York: 2002.

<sup>6</sup> Source: National Jewish Population Survey 2000-2001 (Table 1).





**Attachment D**

**Special Report  
Nazi Victims in the New York Area:  
Selected Topics**

*UJA-Federation of New York*  
*The Jewish Community Study of New York: 2002*

**Special Report**

**Nazi Victims in the New York Area: Selected Topics**

Report prepared by

**Ukeles Associates, Inc.**

for

**UJA-Federation of New York**

November 2003

The Jewish Community Study of New York, 2002 was commissioned by UJA-Federation of New York to provide information about Jewish households in the eight-county New York Area that would be useful for policy and planning decisions. This study area includes the five boroughs of New York City (Bronx, Brooklyn, Manhattan, Queens, and Staten Island), Nassau, Suffolk, and Westchester Counties. The information is based on a stratified random sample survey of 4,500 Jewish households interviewed between March and September of 2002.

Initial findings from the Study and a Note on Methodology are included in *The Jewish Community Study of New York, 2002: Highlights*, released in June, 2003 and available at [www.ujafedny.org/jewishcommunitystudy](http://www.ujafedny.org/jewishcommunitystudy). Additional reports based on the survey data will be released early in 2004.

## PREFACE

There are 55,000 Jewish victims of Nazi persecution living in the New York Area. Many Nazi victims are old and frail and in critical need of our assistance.

At UJA-Federation of New York, we are dedicated to supporting all New York's elderly. What's more, our strategic guidelines mandate that we support survivors wherever they live, as part of our global mission to care for all members of our community – in New York, in Israel, and throughout the world. Together with our agency partners, we provide the necessary home care and congregate care for frail elderly survivors to live out their lives independently and with dignity.

The following *Special Report on Nazi Victims in the New York Area: Selected Topics* provides a lens through which we can ascertain the sheer numbers of Nazi victims living in the New York Area today, as well as gain insight into *who* these members of our community are and *what* their needs are. With this knowledge, we can fulfill our mission to be there for them.

# Nazi Victims in the New York Area: Selected Topics

## Introduction

There is growing concern about the situation of Nazi victims today, nearly 60 years after the Holocaust. Substantial resources have become available to meet the needs of Nazi victims, albeit too late for the many who have died since the end of World War II. The effort to allocate the available resources equitably has been hampered by the lack of adequate information about the number and distribution of Nazi victims, their characteristics, and their needs. This brief report and selected tables provide some relevant information about Nazi victims in the New York Area which may be helpful in communal decision-making.

## Definitions

In the Jewish Community Study of New York: 2002, a Nazi victim was operationally defined as a Jewish respondent, spouse, or other adult in the interviewed Jewish household who had lived in or fled from a country that was under Nazi rule, Nazi occupation, or under the direct influence or control of the Nazis between 1933 and 1945.

- Respondents born in 1945 or earlier who were born outside the United States were asked: "...Between 1933 and 1945, did you live in or flee from a country that was under Nazi rule, Nazi occupation, or under the direct influence or control of the Nazis?"
- Data was also collected for spouses (or unmarried partners) born outside the United States prior to 1946: "...Between 1933 and 1945, did he/she live in or flee from a country that was under Nazi rule, Nazi occupation, or under the direct influence or control of the Nazis?"
- Finally, if there were other adults in the household who were at least 56 years old, the respondent was asked if: "Between 1933 and 1945, other than you and your (spouse/ partner), did any of the other adults in the household live in or flee from a country that was under Nazi rule, Nazi occupation, or under the direct influence or control of the Nazis?"

Answers to the three related questions on Nazi victimization have been collected and analyzed for Jewish respondents, Jewish spouses, and other Jewish household adults. Age and country of birth have been checked to verify that the respondent-spouse-other adult met the criteria to be labeled as a Nazi victim.

The language of these questions is based on the definition of Nazi victim used by the Conference on Jewish Material Claims Against Germany (Claims Conference), and the definition used by the American Jewish Joint Distribution Committee (JDC) to identify Nazi victims in the former Soviet Union. The basic question (with three variations) on Nazi victim experiences used in the Jewish Community Study of New York: 2002 is essentially the same as the question used in the 2000 National Jewish Population Survey (NJPS 2000) in the United States<sup>1</sup>, and is similar to, but somewhat broader than, the question for identifying Nazi victims used in the 1997 Study of the Non-Institutionalized Elderly conducted by the Bureau of Central Statistics in Israel.

More than 4,500 interviews were completed with Jewish households for the Jewish Community Study of New York: 2002. A total of 412 Jewish adults in 319 interviewed households were classified as Nazi victims on the basis of the series of questions asked of all survey respondents.<sup>2</sup> All data presented in this Special Report are projected estimates of the number of Nazi victims and Nazi victim households based upon the interviews, utilizing survey data "weighting" techniques appropriate to the sampling design and data collected.

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<sup>1</sup> In the Jewish Community Study of New York: 2002, three separate questions were asked (as appropriate) for the respondent, spouse/partner, and other adults in the household. During the screening phase of the survey, interviewers attempted to complete an interview with the person who answered the telephone as a means to minimize respondent (and household) refusal to complete the survey. In single adult households, the question was asked only of the respondent; in multiple adult households, the relevant questions were asked about respondent, spouse, and other adults to compile the information needed on all household members. All interview data on Nazi victim respondents, spouses, and other adults was weighted with the "household" weight variable in order for the survey interview data to be projected to statistical estimates of the numbers of Nazi victims in the eight-county UJA-Federation of New York service area.

In the NJPS 2000 survey, respondents in multiple-adult households were randomly selected, and one or two questions were asked only of respondents ages 55+ in 2000 who were born in Europe: "Between 1933 and 1945 did you live in a country that was under Nazi rule or under the direct influence of the Nazis?" Respondents who answered "no" were then asked: "Between 1933 and 1945 did you leave a country or region under Nazi rule or direct influence because of Nazi occupation of the area you were living in at the time?" Data collected on respondents was then weighted by a "respondent" weight variable in order to extrapolate an estimated number of Nazi victims for the entire United States.

<sup>2</sup> Among the 412 Jewish adult Nazi victims in 319 Jewish households were 246 respondents, 128 spouses, and 38 other adults. In 161 of the 319 Nazi victim households, the respondent was the only Nazi victim; in 83 households, both the respondent and the spouse were Nazi victims, and in 2 households the respondent and another adult were Nazi victims. There were 73 households interviewed where the respondent was not a Nazi victim, but either the spouse (45 households) or another adult (28 households) was classified as a Nazi victim.

## Summary of Findings

Based upon the interviews completed as part of the Jewish Community Study of New York: 2002, the numbers of Nazi victims have been estimated for the eight-county area:

- An estimated 55,000 Jewish Nazi victims live in the eight-county New York Area.
- Nazi victims represent 15% of all Jewish adults age 57 and older in the New York area.<sup>3</sup>
- 58% of Nazi victims are female.
- The median age of Nazi victims is 72 years.
  - 16% are between the ages of 57 and 65
  - 40% are between 65 and 74
  - 44% are at least 75<sup>4</sup>
- One in four Nazi victims (26%) lives alone.
- Nazi victims living in one-person households are considerably older than Nazi victims living in two-person or multiple-person households.
  - The median age of Nazi victims living alone is 76, compared to a median age of 72 for Nazi victims living in two-person households and 68 for victims living in multiple-person households.
  - 60% of Nazi victims living alone are at least 75 years.

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<sup>3</sup>The questions asked about Nazi victim status were restricted to individuals born in 1945 or earlier; the youngest Nazi victim was 57 years old. The Jewish Community Study of New York: 2002 estimated that 1,412,000 Jews (of all ages, including children) lived in the eight-county New York area. The 55,000 Nazi victims represent 4% of the 1,412,000 Jews in the study area. Of these 1,412,000 Jews in the eight-county New York Area, 27% (approximately 377,000) were at least 57 years old. The 55,000 Jewish Nazi victims represent 15% of all Jews born prior to 1946.

<sup>4</sup> Female Nazi victims tend to be older: 49% of female Nazi victims are at least 75 years old, while 37% of male Nazi victims are at least 75 years old.

- 54% of Nazi victims in the eight-county New York Area live in Brooklyn, 16% live in Queens, and 12% live in Manhattan.
- **Half of the Nazi victims live in Russian-speaking Jewish households.**
  - 27,800 Nazi victims (51%) live in New York Jewish households in which an adult was born in the former Soviet Union, or the survey respondent (typically born in Eastern Europe) answered the questions in Russian.
  - Almost three out of four Brooklyn Jewish Nazi victims live in Russian-speaking households, as do just under half of Queens Jewish Nazi victims. Only 7% of Manhattan's Jewish Nazi victims live in a Russian-speaking household.
- **Nazi victim respondents in Russian-speaking households are much more likely to be recent arrivals to the United States.**
  - 67% of Nazi victim respondents in Russian-speaking households have moved to the United States since 1990. Only 10% of Nazi victim respondents in Russian-speaking households moved to the United States prior to 1970.
  - In contrast, 95% of Nazi victim respondents in non-Russian-speaking Jewish households came to the United States prior to 1970, while only 1% came from 1990 to 2002.
- **The 55,000 Nazi victims live in 43,300 Jewish households, 7% of all Jewish households in the New York study area, but 16% of all Jewish households with any adult age 57 or older.**
  - In approximately 23,100 Jewish households, only the survey respondent was a Nazi victim.
  - In 6,400 households, only the respondent's spouse was a Jewish Nazi war victim.
  - In 10,400 households, both the respondent and the spouse were Nazi victims.<sup>5</sup>

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<sup>5</sup> In 400 of these households, the respondent, his/her spouse, and another adult in the household were all Nazi victims. Another 200 Jewish households included a Nazi victim respondent and a non-spouse other adult. In approximately 3,200 New York Area Jewish households, the only Nazi victim was another adult in the household.



**Nazi victim households are more likely to be poor than other New York Jewish households.**

- Half of all Nazi victims live in households with household incomes below 150% of the Federal poverty guidelines.<sup>6</sup>
  - 38% of Nazi victims live in households with annual incomes that place them under the 100% poverty guideline standard.
  - 13% live in households which report incomes placing them between 100% and 150% of poverty guideline levels.
- **Nazi victims are more likely to be poor than near-poor.**
  - More Nazi victims live in poor households (51%) than in "near-poor" households (11%) which have incomes above 150% of the Federal poverty guidelines, but under \$35,000 annual yearly income. Another 12% have incomes between \$35,000 and \$50,000.
- **Since the poverty level calculations are based upon both income and the number of people living in the household, there is only a moderate relationship between the number of people living in a Nazi victim household and poverty:**<sup>7</sup>
  - 44% of Nazi victims living alone are under the 100% poverty level, compared to 37% of those living with another person and 32% of those living with several other persons.

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<sup>6</sup> Poverty level comparisons between Nazi victims and non-victims are easier to make on the household (rather than on an individual) level; 36% of Nazi victim *households* are below 100% of poverty, and another 11% between the 100% and 150% guidelines. Only 8% of non-victim households interviewed for the Jewish Community Study of New York: 2002 were below the 100% poverty guidelines, while another 5% reported incomes between the 100% and the 150% standards.

<sup>7</sup>The poverty guidelines are specific to household size. For one-person households, annual household incomes under approximately \$9,000 are defined as 100% of poverty, and incomes under \$13,000 are defined as 150% of poverty. For two-person households, the approximate income ranges (reflected in questions in the Jewish Community Study of New York: 2002 that were household-size specific) are \$12,000 and \$18,000 respectively. For three-person households, the corresponding income levels are \$15,000 and \$22,000. The 150% poverty level has been used as an operational definition for the New York Jewish "poor" in a series of reports prepared by David Grossman of the Nova Institute for the New York Metropolitan Coordinating Council on Jewish Poverty.

- **Nazi victims in Russian-speaking households are much more likely to be poor than Nazi victims in non-Russian-speaking households:**
  - 81% of Nazi victims living in Russian-speaking households report annual income below 150% of the poverty guidelines (70% below the 100% poverty level).
  - In contrast, only 21% of Nazi victims in non-Russian-speaking households are below the 150% poverty level.
  - Thus, four out of five Russian-speaking-household Nazi victims are below the 150% poverty level, while only one in five non-Russian speaking-household Nazi victims are below 150% of the poverty standard.
- **Russian-speaking Nazi victims and Russian-speaking New Yorkers who are *not* Nazi victims have the same high level of poverty.**
  - 69% of the Nazi victim Russian-speaking-households are below the 100% poverty level.
  - 73% of *non-victim* Russian-speaking households with at least one adult in the household who is at least 57 years old (the youngest Nazi victim) are below the 100% poverty level.
- **Nazi victim respondents also report relatively poor health.**

Both Nazi victim history and Russian-speaking status have an independent impact on the self-reported health of Nazi victims, although Russian-speaking household membership appears to have the stronger impact.

Among all Jewish survey respondents age 57 and older:

- None of the Nazi victim respondents in Russian-speaking-household respondents report excellent health; 28% report their health to be poor.<sup>8</sup>

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<sup>8</sup> All survey respondents were asked: "Would you say that your own health is excellent, good, fair or poor?" Age was a critical factor in respondent answers. Almost half (48%) of all survey respondents under age 57 report their health to be excellent, and another 43% report their health as good; 8% report fair health and just over 1% report poor health. Among all respondents age 57 and older, comparable percentages are: 21% excellent, 38% good, 30% fair, and 11% poor.

- Non-victim Russian-speaking-household respondents report similar answers: only 5% report excellent health, while 34% report poor health.
- Among Nazi victim respondents in non-Russian-speaking-households, 12% reported excellent health, but only 6% report poor health.
- Excellent health is reported by 26% of Jewish, non-victim, non-Russian-speaking-household respondents (age 57 and over), while 6% report poor health.

## Conclusions

- There are clearly poor Nazi victims in the New York Area.
- The vast majority of these poor Nazi victims are relatively recent Russian-speaking arrivals. Relatively few Nazi victims who are not Russian-speaking are poor.
- Both Nazi victims and non-victim Jews (age 57 and older) living in Russian-speaking households seem to have substantial financial (and health-related) needs.
- There appears to be no difference between the poverty level of Russian-speaking households with a Nazi victim and Russian-speaking households with an older person who is not a Nazi victim.

## Nazi Victims in the New York Area: Tables

Exhibit 1. Number of Jewish Nazi Victims, New York Area\*  
Jewish Community Study of New York: 2002

	ESTIMATED NUMBER
<b>JEWISH NAZI VICTIMS</b>	<b>55,000</b>
Survey Respondents	33,700
Spouses	16,900
Other Jewish Adults in the Household	4,400

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\*The New York Area includes the five New York City boroughs (Bronx, Brooklyn, Manhattan, Queens, and Staten Island), and Nassau, Suffolk, and Westchester Counties.

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Special Report: Nazi Victims in the New York Area: Selected Topics, The Jewish Community Study of New York: 2002, prepared by Ukeles Associates, Inc. for UJA-Federation of New York, November 2003.

Exhibit 2. Jewish Nazi Victims as a Percentage of Jews in the New York Area,  
Jewish Community Study of New York: 2002

NEW YORK AREA	ESTIMATED NUMBER	% NAZI VICTIMS COMPARED TO:
<b>Jewish Nazi Victims</b>	55,000	
All Jewish Adults Age 57 and Older	377,000	15%
All Jews in the Eight-County Area	1,412,000	4%

Exhibit 3. Gender of Jewish Nazi Victims,  
Jewish Community Study of New York: 2002

GENDER: JEWISH NAZI VICTIMS	ESTIMATED NUMBER	PERCENT
Male Nazi Victims	23,200	42%
Female Nazi Victims	31,800	58
Total	55,000	100%

Exhibit 4. Age of Jewish Nazi Victims,  
Jewish Community Study of New York: 2002

AGE: JEWISH NAZI VICTIMS	ESTIMATED NUMBER	PERCENT
Under Age 65	9,000	16%
Ages 65 – 75	21,900	40
Ages 75 – 84	19,000	35
Ages 85+	5,000	9
Total	55,000*	100%*
MEDIAN AGE	72 Years	

\* In all tables, numbers may not add exactly or percentages add to 100% due to rounding for presentation.

Special Report: Nazi Victims in the New York Area: Selected Topics, The Jewish Community Study of New York: 2002, prepared by Ukeles Associates, Inc. for UJA-Federation of New York, November 2003.

Exhibit 5. Age and Gender Distribution of Jewish Nazi Victims,  
Jewish Community Study of New York: 2002

AGE OF JEWISH NAZI VICTIMS	GENDER OF NAZI VICTIM	
	Males	Females
Under Age 65	15%	17%
Ages 65 - 74	48	34
Ages 75 - 84	28	40
Ages 85+	9	9
Total	100% [N=23,200]	100 % [N=31,800]
MEDIAN AGE	72	73



Exhibit 6. Household Size: Jewish Nazi Victims,  
Jewish Community Study of New York: 2002

NAZI VICTIM LIVES IN:	ESTIMATED NUMBER	PERCENT
1 Person Household (by self)	14,300	26%
2 Person Household	30,800	56
3+ Person Household	9,900	18
Total	55,000	100%

Exhibit 7. Age and Household Size, Jewish Nazi Victims,  
Jewish Community Study of New York: 2002

AGE OF JEWISH NAZI VICTIMS	NAZI VICTIM HOUSEHOLD SIZE		
	1 Person	2 Persons	3 or More Persons
Under Age 65	10%	18%	20%
Ages 65 - 74	30	43	44
Ages 75 - 84	45	33	24
Ages 85+	15	6	12
Total	100%	100%	100%
MEDIAN AGE	76	72	68

Exhibit 8. Borough/County of Residence, Jewish Nazi Victims,  
Jewish Community Study of New York: 2002

BOROUGH - COUNTY	ESTIMATED NUMBER OF JEWISH NAZI VICTIMS	% OF ALL NAZI VICTIMS IN NEW YORK AREA
Bronx	1,900	3%
Brooklyn	29,700	54
Manhattan	6,700	12
Queens	9,200	17
Staten Island	< 500	<1%
Nassau County	3,600	6
Suffolk County	1,400	3
Westchester County	2,100	4
Total	55,000	100%

Exhibit 8a. Borough/County of Nazi Victims Residence Compared to  
 All Jews Living in Borough/County,  
 Jewish Community Study of New York: 2002

BOROUGH - COUNTY	ESTIMATED NUMBER OF JEWISH NAZI VICTIMS	% JEWISH NAZI VICTIMS OF ALL JEWS LIVING IN BOROUGH/COUNTY
Bronx	1,900	4%
Brooklyn	29,700	6%
Manhattan	6,700	3%
Queens	9,200	5%
Staten Island	< 500	1%
Nassau County	3,600	2%
Suffolk County	1,400	2%
Westchester County	2,100	2%
Total	55,000	

Exhibit 8b. Relationship of Borough/County of Nazi Victims Residence and Russian-Speaking Household Status, Jewish Community Study of New York: 2002

BOROUGH – COUNTY	NUMBER OF NAZI VICTIMS LIVING IN RUSSIAN-SPEAKING HOUSEHOLDS	NUMBER OF NAZI VICTIMS LIVING IN NON-RUSSIAN-SPEAKING HOUSEHOLDS
Bronx	200	1,700
Brooklyn	21,700	7,900
Manhattan	500	6,300
Queens	4,100	5,000
Staten Island	300	100
Nassau County	400	3,200
Suffolk County	300	1,200
Westchester County	400	1,800
Total	27,800*	27,200*

\* Numbers and percentages may not add exactly due to rounding for presentation.

Special Report: Nazi Victims in the New York Area: Selected Topics, The Jewish Community Study of New York: 2002, prepared by Ukeles Associates, Inc. for UJA-Federation of New York, November 2003.

Exhibit 9. Time Period in Which Nazi Victim Respondent Moved to the United States by Whether Respondent Lives in Russian-Speaking Household, Jewish Community Study of New York: 2002

TIME PERIOD JEWISH NAZI VICTIM RESPONDENT MOVED TO USA	NAZI VICTIM RESPONDENTS IN <i>RUSSIAN-SPEAKING</i> HOUSEHOLDS	NAZI VICTIM RESPONDENTS IN NON-RUSSIAN- SPEAKING HOUSEHOLDS
Prior to 1970	10%	95%
1970 - 1979	14	4
1980 - 1989	9	<1%
1990 - 2002	67	1
Total	100%*	100%

Exhibit 10. Estimated Number of Jewish Households with Nazi Victims,  
Jewish Community Study of New York: 2002

JEWISH NAZI VICTIM IN HOUSEHOLD:	Estimated Number Of Jewish <i>Households</i> with a Nazi Victim	% of Jewish Households with a Nazi Victim
Survey Respondent Only	23,100	53%
Survey Respondent & Spouse	10,000	23
Survey Respondent, Spouse & Other Adult	400	<1%
Survey Respondent & Other Adult	200	<1%
Spouse Only (Respondent Not a Nazi Victim)	6,400	15
Other Jewish Adults in the Household Only	3,200	7
Total – Jewish Households with a Nazi Victim	43,300	100%

Exhibit 11. Jewish Households with Nazi Victims as a Percentage of New York Area Jewish Households, 2002\*

NEW YORK AREA	ESTIMATED NUMBER	% NAZI VICTIM HOUSEHOLDS COMPARED TO:
All Households with Jewish Nazi Victims	43,300	
All Households with a Jewish Adult Age 57 and Older	280,000	16%
All Jewish Households in the Eight-County Area	643,000	7%

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\* The Jewish Community Study of New York: 2002 surveyed Jewish households living in the UJA-Federation of New York service area, which is comprised of the five New York City boroughs (Bronx, Brooklyn, Manhattan, Queens, and Staten Island), as well as Nassau, Suffolk, and Westchester Counties.

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Special Report: Nazi Victims in the New York Area: Selected Topics, The Jewish Community Study of New York: 2002, prepared by Ukeles Associates, Inc. for UJA-Federation of New York, November 2003.



Exhibit 12. Poverty Among Jewish Nazi Victims,  
Jewish Community Study of New York: 2002

NAZI VICTIM LIVES IN HOUSEHOLD WITH ANNUAL INCOME:	ESTIMATED NUMBER	% of ALL NAZI VICTIMS
Below 100% of Poverty Guidelines*	21,000	38%
Between 100% and 150% of Poverty Guidelines	7,000	13
Above 150% of Poverty Guidelines	27,000	49
Total	55,000	100%

\* Poverty guidelines are specific to household size. For one-person households, annual household incomes under approximately \$9,000 are defined as 100% of poverty, and incomes under \$13,000 are defined as 150% of poverty. For two-person households, the approximate income ranges are \$12,000 and \$18,000 respectively. For three-person households, the corresponding income levels are \$15,000 and \$22,000. The 150% poverty level has been used as an operational definition of the New York Jewish "poor" in a series of reports issued by the New York Metropolitan Coordinating Council on Jewish Poverty.

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Special Report: Nazi Victims in the New York Area: Selected Topics, The Jewish Community Study of New York: 2002, prepared by Ukeles Associates, Inc. for UJA-Federation of New York, November 2003.

Exhibit 13. Poverty Level and Income of All Jewish Nazi Victims,  
Jewish Community Study of New York: 2002

NAZI VICTIM LIVES IN HOUSEHOLD WITH ANNUAL INCOME:	PERCENT
Below 150% of Poverty Guidelines	51%
Above 150% of Poverty Guidelines, Below \$35,000 income	11
\$35,000 to \$50,000	12
\$50,000 to \$100,000	12
\$100,000 and Over	15
Total	100%*

\* Percentages may not add to 100% due to rounding.

Special Report: Nazi Victims in the New York Area: Selected Topics, The Jewish Community Study of New York: 2002, prepared by Uketes Associates, Inc. for UJA-Federation of New York, November 2003.

Exhibit 14. Poverty Among Jewish Nazi Victims, by Size of Household,  
Jewish Community Study of New York: 2002

Nazi Victim Lives			
NAZI VICTIM LIVES IN HOUSEHOLD WITH ANNUAL INCOME:	Alone: 1 Person Household	With 1 Other Person	With Several Other People
Below 100% of Poverty Guidelines	44%	37%	32%
Between 100% and 150% of Poverty Guidelines	11	14	12
Above 150% of Poverty Guidelines	45	49	56
Total	100%	100%	100%

Exhibit 15. Poverty Among Nazi Victims, Russian-Speaking Households and Non-Russian-Speaking Households, Jewish Community Study of New York: 2002

NAZI VICTIM LIVES IN HOUSEHOLD WITH ANNUAL INCOME:	NAZI VICTIMS IN <i>RUSSIAN-SPEAKING</i> HOUSEHOLDS	NAZI VICTIMS IN <i>NON-RUSSIAN-SPEAKING</i> HOUSEHOLDS
Below 100% of Poverty Guidelines	69%	6%
Between 100% and 150% of Poverty Guidelines	10	15
Above 150% of Poverty Guidelines	22	79
Total	100%*	100%*

\* Percentages may not add to 100% due to rounding for presentation.

Exhibit 16. Poverty in Russian-Speaking Households with Nazi Victims and without Nazi Victims, at Least One Adult in Household Age 57 or Older, Jewish Community Study of New York: 2002

	AT LEAST ONE ADULT IN HOUSEHOLD AGE 57+	
HOUSEHOLD WITH ANNUAL INCOME:	<i>RUSSIAN-SPEAKING HOUSEHOLDS WITH NAZI VICTIMS</i>	<i>RUSSIAN-SPEAKING HOUSEHOLDS WITHOUT ANY NAZI VICTIMS</i>
Below 100% of Poverty Guidelines	69%	73%
Between 100% and 150% of Poverty Guidelines	10	4
Above 150% of Poverty Guidelines	22	23
Total	100%*	100%

\* Percentages may not add to 100% due to rounding for presentation.

Special Report: Nazi Victims in the New York Area: Selected Topics, The Jewish Community Study of New York: 2002, prepared by Ukeles Associates, Inc. for UJA-Federation of New York, November 2003.

Exhibit 17. Health Status of Survey Respondents, Age 57+,  
 Jewish Nazi Victims and Jewish Non-Victims by  
 Whether Respondent Lives in a Russian-Speaking Household,  
 Jewish Community Study of New York: 2002

SELF-REPORTED HEALTH IS:	JEWISH RESPONDENT, AGE 57+, LIVES IN:			
	Russian-Speaking Household		Non-Russian-Speaking Household	
	Nazi Victim	Not Nazi Victim	Nazi Victim	Not Nazi Victim
Excellent	0%	5%	12%	26%
Good	15	17	36	44
Fair	57	43	46	24
Poor	28	34	6	6
Total	100%	100%*	100%	100%

\* Percentages may not add to 100% due to rounding for presentation.



**Attachment E**

**Projected Victim Population in the New York Area,  
2002-2017: Age and Size**



Projected Victim Population in the New York Area, 2002-2017: Age and Size

Age	2002		2003		2004		2005		2006		2007		2008		2009	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
55-59	4,725	8.6%	3,526	6.7%	403	0.8%	385	0.8%	-	0.0%	-	0.0%	-	0.0%	-	0.0%
60-64	10,440	19.0%	10,998	20.9%	13,489	26.8%	10,842	22.5%	3,965	8.6%	3,745	8.6%	2,756	6.7%	311	0.8%
65-69	20,000	36.4%	19,148	36.4%	12,234	24.3%	12,189	25.3%	18,443	40.0%	8,278	19.0%	8,562	20.8%	10,385	26.7%
70-74	5,769	10.5%	3,049	5.8%	8,608	17.1%	8,626	17.9%	7,463	16.2%	15,861	36.4%	14,982	36.4%	9,451	24.3%
75-79	8,407	15.3%	9,158	17.4%	6,044	12.0%	6,163	12.8%	6,885	14.5%	4,570	10.5%	2,390	5.8%	6,648	17.1%
80-84	4,725	8.6%	5,897	11.2%	7,756	15.4%	7,418	15.4%	7,097	15.4%	6,667	15.3%	7,161	17.4%	4,670	12.0%
85+	934	1.7%	897	1.7%	1,859	3.7%	2,601	5.4%	2,491	5.4%	4,487	10.3%	4,487	10.3%	7,427	19.1%
Total	55,000		52,674		50,394		48,223		46,145		43,608		41,154		38,892	
	2010		2011		2012		2013		2014		2015		2016		2017	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
55-59	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%
60-64	293	0.8%	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%
65-69	8,233	22.4%	2,949	8.5%	2,747	8.5%	2,015	6.7%	220	0.8%	211	0.8%	-	0.0%	-	0.0%
70-74	9,295	25.3%	13,883	40.0%	6,135	19.0%	6,245	20.8%	7,454	26.7%	5,815	22.4%	2,051	8.5%	1,905	8.5%
75-79	6,575	17.9%	5,623	16.2%	11,749	36.4%	10,925	36.4%	6,786	24.3%	6,566	25.3%	9,661	40.0%	4,267	19.0%
80-84	4,707	12.8%	5,037	14.5%	3,388	10.5%	1,740	5.8%	4,771	17.1%	4,643	17.9%	3,910	16.2%	8,169	36.4%
85+	7,637	20.8%	7,216	20.8%	8,260	25.6%	9,093	30.3%	8,681	31.1%	8,727	33.6%	8,516	35.3%	8,095	36.1%
	36,740		34,707		32,280		30,018		27,912		25,962		24,139		22,436	

Source: The Jewish Community Study of New York, 2002, applying actuarial assumptions from A Plan for Allocating Successor Organization Resources (Conference on Jewish Material Claims Against Germany, June 2000)





**Attachment F**

**Letter of Support of Edwin Mendez-Santiago  
Commissioner, New York City Department for the Aging**



DEPARTMENT FOR THE AGING

2 LAFAYETTE STREET  
New York, New York 10007-1392  
(212) 442-1100

Edwin Méndez-Santiago, MSW, CSW  
Commissioner

January 22, 2004

The Honorable Edward R. Korman  
Chief Judge  
United States District Court for the  
Eastern District of New York  
225 Cadman Plaza East, Room 448  
Brooklyn, NY 11201

Dear Judge Korman:

In my capacity as Commissioner of the New York City Department for the Aging (DFTA) and a professional in the field of service to seniors over the last 25 years, I write in support of the United Jewish Appeal—Federation of Jewish Philanthropies of New York's (UJA-Federation) proposal to access unclaimed residual funds in the matter of In Re: Holocaust Victim Assets Litigation for the purpose of assisting Holocaust victims in need in New York City.

I am highly familiar with the numerous public benefits available to seniors in New York City and the systems through which seniors access such benefits. I am proud of DFTA's efforts to connect New York City seniors to public benefits such as Medicaid, Medicare, Supplemental Social Security, Food Stamps and Senior Citizens Rent Exemption, but at the same time I recognize that, despite the existence of such benefits, far too many low-income and otherwise poorly resourced seniors residing in New York City struggle sorely to meet essential needs associated with housing, health care, home care. This is so for a range of reasons, including restrictive eligibility criteria relating to certain benefits, limitations of funding available via certain benefits, and delays associated with application and other administrative processes.

Non-governmental efforts such as those proposed by UJA-Federation to better connect seniors to public benefits and provide alternative forms of assistance to seniors ineligible for benefits are immensely valuable, and I am therefore pleased, once again, to express support for the proposal.

Sincerely,

A handwritten signature in black ink, appearing to read "Edwin Méndez-Santiago".

Edwin Méndez-Santiago  
Commissioner



**Attachment G**  
**Benefit Analysis for New York Area Victims**

PROGRAM TITLE	BENEFITS	ELIGIBILITY CRITERIA	EST. # NAZI VICTIMS INELIGIBLE		BARRIERS TO PROGRAM FOR ELIGIBLE NAZI VICTIMS
			TOTAL # VICTIMS	TOTAL # POOR/NEAR POOR VICTIMS**	
MEDICARE	Part A- Hospital Insurance Program Coverage for acute hospital care; limited coverage for skilled nursing home, hospice and home care Deductible: \$876 per benefit period Copayments: \$218/day for hospital days 61-90 \$436/day for hospital days 91-150 \$109 50/day for skilled nursing home days 21-100	65 and older; enrollment in Social Security; no income limits Non-Social Security recipients may purchase coverage for \$316 per month, which can be paid by Medicaid for those under 120% FPL. (Disabled are also eligible after receiving disability benefits for two years.)	Zero		Costs of premiums, deductibles and co-insurance are prohibitive for many. (Though QMB, SLMB and QI-1, to be described below, can offset these costs for some, these programs are only for the very poor. Others must purchase private Medigap insurance with costly premiums.)
	Part B- Medical Insurance Limited coverage for physicians, outpatient services, diagnostic tests and durable medical equipment Deductible: \$100 per year Premium: \$66.60 per month	65 or older (or blind or disabled); Enrolled in Medicaid Hospital Insurance Program (Part A); Eligible for Medicare Medical Insurance Program (Part B); Maximum monthly income for individuals 100% Federal Poverty Level - \$756. Maximum monthly income for couples \$1,061. Asset limits \$4000 for singles, \$6000 for couples, excluding burial costs.	Approximately 36,000	Approximately 10,000	Application processing takes two to three months.
QUALIFIED BENEFICIARY (QMB) PROGRAM		Same as QMB but increased income limits (120% FPL): Maximum monthly income for individuals: \$797 - \$951; Maximum monthly income for couples: \$1,092 - \$1,263 Same asset limits as QMB	Approximately 40,000	Approximately 14,000	Pays Part B premium only, deductibles and co-payments not reimbursable. Application processing takes two to three months.
SPECIFIED LOW INCOME BENEFICIARY (SLMB) PROGRAM		Same asset limits as QMB and SLMB but increased income limits - 135% FPL: Maximum monthly income for individuals: \$951 - \$1,066; Maximum monthly income for couples: \$1,269 - \$1,426	Approximately 42,000	Approximately 16,000	Pays Part B premium only, deductibles and co-payments are not reimbursable. Application processing takes two to three months. The program is not considered an entitlement so only finite amounts of funding for it are available Program due to sunset September 30, 2004.
QUALIFYING INDIVIDUALS-1 <sup>1)</sup>					

\* Data on benefits and eligibility criteria by Samuel Sadin Institute on Law/Brookdale Center on Aging of Hunter College. Information on Nazi Victim eligibility based on 2002 Unites study and analyses by Seihlhp Community Services and UJA-Federation of New York.

\*\* Criteria for defining "poor" and "near poor" = income up to 150% of Federal Poverty Standard.



PROGRAM TITLE	BENEFITS	ELIGIBILITY CRITERIA	EST. # NAZI VICTIMS INELIGIBLE		BARRIERS TO PROGRAM FOR ELIGIBLE NAZI VICTIMS
			TOTAL # VICTIMS	TOTAL # POOR/NEAR POOR VICTIMS**	
MEDICAID	Comprehensive health care benefits, including coverage for prescription drugs, physician services, hospitals, nursing homes and home care	For ages 65 and older or disabled. Singles, maximum monthly income of \$674 (2004); Couples, maximum monthly income of \$970; maximum \$5,700 assets, exclusive of funeral-related expenses.	Approximately 37,000	Approximately 11,000	Lengthy delays associated with Home Care applications. Does not allow an income deduction for high rent expenses, requiring individual to use income needed to pay rent for medical expenses.
	Community spouse allowances when other spouse is institutionalized Resources: \$2,139 Income: \$74,820 or the amount of spousal share up to \$92,760	0 in this category, those whose income or assets exceed these thresholds become eligible once the surplus amount is expended for medical purposes For those between 60 and 64 who are not disabled and not for minor children. Singles: \$352 in monthly income; \$3,000 in assets; Couples: \$468.50 in monthly income; \$3000 in assets.			
SUPPLEMENTAL SECURITY INCOME (SSI)	Provides monthly cash benefits to meet food, clothing and shelter needs. The amount of the benefits depends on beneficiary's income and whether the person lives "alone" with others, "in the household of another" or in a residential care facility.	65 and older (and blind or disabled) Singles living alone: maximum monthly income of \$671; Couples living alone: maximum monthly income of \$970; Individuals living with others: maximum monthly income of \$607. Couples living with others: maximum monthly income of \$912. Singles living in household of another: maximum monthly income of \$419. Couples living in household of another: maximum monthly income of \$630. Asset limit - singles: \$2000, couples \$3000, excluding burial costs.	Approximately 34,000	Approximately 12,000	Federal changes enacted in 1995 limit eligibility for many poor Russian immigrants. Survivors who immigrated as refugees or asylees from the FSU or elsewhere are now being cut off SSI if they immigrated after August 22, 1996 and have not yet become citizens - they may receive SSI only for seven years following their entry into the U.S., unless they become citizens. This policy applies to an estimated 18,000 immigrants from the FSU. Those who immigrated before August 22, 1996 are also subject to the 7-year limit, but may continue receiving SSI if they are now disabled.
	Relief from the obligation to pay rent increases; landlord is compensated by reduction in real estate taxes.	62 or older; \$24,000 maximum household income; rent expense exceeds one-third household income; residence is rent-controlled, rent-subsidized or part of a Mitchell-Lama housing development.	Available data does not permit a reliable estimate		70.6% of NY area Nazi Victims live in Brooklyn and Queens, according to the Ukates study. While housing in Manhattan is largely rent controlled and stabilized, housing in these two boroughs is less likely to be rent controlled or stabilized, so is often not subject to SCRIE 1
SENIOR CITIZEN RENT EXEMPTION (SCRIE)	Monthly allotment of benefits through a debit card system for the purchase of food items; dollar value depends on household size and income	60 and older; eligible if net (shelter, utility, and medical) expenses may be subtracted in calculating net income; household income not exceeding 100% of the Poverty Standard. Asset limit for is \$3000 for singles and couples.	Approximately 34,000	Approximately 8,000	Administrative delays; confusion associated with application process; insufficient outreach; inadequate benefit amount.
FOOD STAMPS					

1 2004. Proposal by the UJA-Federation of New York for Providing Assistance to Needy Nazi Victims in New York, footnote 14. While only 14.9% of rental housing in Manhattan is unregulated, 43.9% of rentals in Queens and 36.2% of rentals in Brooklyn are unregulated. Tenants in these apartments have no protection from rent increases, and are not eligible for SCRIE. See The Furman Center Report cited at In 5, supra, at Chapter 1, p. 6.  
Borough Table 1-5. For the relatively few rent regulated apartments that exist in Queens and Brooklyn, where most survivors live, the vacancy rate is far lower than that for unregulated market rate rentals. See Id. Borough Table 1-6 (vacancy rate for rent stabilized units in Brooklyn is 2.5% compared to 5% vacancy rate for unregulated Brooklyn units).

PROGRAM TITLE	BENEFITS	ELIGIBILITY CRITERIA	EST. # NAZI VICTIMS INELIGIBLE		BARRIERS TO PROGRAM FOR ELIGIBLE NAZI VICTIMS
			TOTAL # VICTIMS	TOTAL # POOR/NEAR POOR VICTIMS**	
SECTION 8	Federal rental subsidy program for very low-income households	Presently in New York, the program is available only to those with specially designated needs or profiles: victims of domestic violence, the homeless, intimidated witnesses and certain families with minor-aged children.	All -- 55,000	29,000	NA
			This program is not accessible to this population.		
202 HOUSING	Provides capital grants and operating subsidies to eligible nonprofit organizations to develop supportive housing for very low-income elderly	Aged 62 years or older, income at or below 50% of the regional median income. In NYC, for year 2003, the maximum eligible income was \$22,050 for single person household and \$25,100 for a two-person household.	Approximately 30,000	Approximately 4,000	Federal funding and available sites for new construction are highly limited and have decreased over the last decade. About 217,000 elderly New Yorkers are on waiting lists for admission to such housing. As a result of the overwhelming demand, many sponsors of 202 housing have closed their waiting list and no longer accept new applications.

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H

**Attachment H**

**Estimated Budget for Selfhelp Model  
Case Management Program**

Selfhelp Community Services

Case Management Service Program  
Projected Annual Budget  
Serving 3400 Clients

Personnel

<u>Title:</u>	<u>Number</u>	<u>Salary</u>	<u>Total Salary</u>
Social Workers	50	45,000	2,250,000
Program Director/Supervisor	8	55,000	440,000
Secretarial	6	30,000	180,000
Custodian (FTE)	2	20,000	40,000
sub-total			2,910,000
Fringe Benefits			931,200

**Personnel Total:** 3,841,200

Other Than Personnel

Rent	225,000
Utilities	15,000
Telephone	60,000
Postage	20,000
Staff Travel	35,000
Printing and Supplies	40,000
Photocopying	15,000
Office Repair	8,000
Meetings, Conferences, Dues	6,000
Insurance	40,000
Other Program Costs	10,000
Program Administration	559,681

**OTPS Total:** 1,033,681

**TOTAL EXPENSES** 4,874,881

Note: Depending upon funding, module can be expanded or reduced to serve additional or fewer clients