2023

SPECIAL REPORT

TO THE COMMUNITY
OCTOBER 7, 2023
DEAR FRIENDS,

If ever there was a moment that encapsulated the power of our community and the strength of UJA’s network, it was October 7, 2023 — a day that will be forever seared into our collective memory.

Never has our purpose been clearer than in the hours, days, and months since that barbaric attack. Immediately upon learning about the scope of the attack, we allocated $10 million from our endowment — created precisely for moments like this — so that our emergency dollars were the first major overseas funds to reach Israel. We also opened an Israel Emergency Fund, harnessing the incredible outpouring of community support.

In Israel, our partners on the ground were able to offer lifesaving aid to the victims of terror, pivoting from work as usual to the demands of an unprecedented crisis.

In New York, we mobilized our community to rally locally and on the national stage, calling out for the release of the hostages in one united voice: “Bring Them Home.”

Every action UJA has taken together with our partners was made possible because of years of investments, relationship-building, and hard-earned expertise. On this foundation of strength and preparedness, we’ve been able to act with immediacy on every front.

All of this is why UJA can be so effective, even while our hearts are breaking.

In lieu of our typical annual report, this Special Report to the Community will share an update on our ongoing response to the war in Israel, covering October 7 to December 31, 2023, recognizing that the war and our related efforts continue. We will also look back briefly at the 2023 fiscal year, July 1, 2022 – June 30, 2023.

Words of thanks feel insufficient to express the depth of our gratitude. We’ve always known our community to be extraordinary — but in this crisis you have shown a generosity that will be long remembered, a fearless resolve, and a spirit of unity that gives so many strength and hope.

You give new resonance to the words Am Yisrael Chai. The Jewish People live.

Linda Mirels
President
Marc Rowan
Chair of the Board
Eric S. Goldstein
Chief Executive Officer
WAR IN ISRAEL

October 7, 2023, will be remembered as the worst attack on the Jewish people since the Holocaust.

On a quiet Shabbat morning that coincided with Simchat Torah in Israel, Hamas terrorists infiltrated 22 communities and a music festival, murdering 1,200, injuring thousands, and abducting more than 240 people to Gaza, including babies, the elderly, and entire families.

Mere hours after we learned of Hamas’s brutal attack, our executive committee met for the first time ever on a Shabbat to allocate $10 million from our endowment, which is how our emergency funds were among the first to reach Israel.

That same day, we opened an Israel Emergency Fund, which as of December 31, 2023, had raised more than $165 million.

Our partners in Israel jumped into action with lifesaving aid, relocating families from the south and providing emergency cash to victims of terror.

We quickly began allocating funds to a wide range of nonprofits, working to meet evolving needs — from the sacred task of collecting the remains of the dead to the relocation of entire communities from the south and north to safer parts of the country.

Guided by the strategic framework which tells us that needs emanating from a crisis of this magnitude require an immediate, intermediate, and longer-term response, we’ve allocated funding on behalf of our community for maximum impact and continue to do so.

ISRAEL EMERGENCY RESPONSE

$64.2 MILLION ALLOCATED TO PROVIDE ESSENTIAL SUPPORT TO THE PEOPLE OF ISRAEL.*

*as of December 31, 2023

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents of Southern Israel</td>
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</tr>
<tr>
<td>Trauma Support and Rehabilitation</td>
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<tr>
<td>Rebuilding Gaza Envelope Communities</td>
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<tr>
<td>Hospitals and Medical Equipment</td>
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<tr>
<td>Evacuees and Shelter Cities</td>
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<tr>
<td>Care for Injured Soldiers and Their Families</td>
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<td>Residents of Northern Israel</td>
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<td>Emergency Response and Recovery</td>
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<tr>
<td>Community Mobilization and Volunteerism</td>
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<tr>
<td>Strengthening Social Cohesion</td>
<td>$3.0M</td>
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<td>Displaced Israelis Outside Israel</td>
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<td>Economic Recovery</td>
<td>$1.8M</td>
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<tr>
<td>Responding to Gender Violence</td>
<td>$610,000</td>
</tr>
<tr>
<td>Families of Hostages</td>
<td>$480,000</td>
</tr>
</tbody>
</table>
RESIDENTS OF SOUTHERN ISRAEL
$10.4 MILLION

- Our funding is providing frail elderly and others who cannot leave their homes with essentials, supporting activities for children and teens, and providing emergency cash assistance. We’ve focused on the needs of vulnerable populations, including people with disabilities and those who are ill.

- Additionally, we are providing aid to support communities’ essential security and emergency services infrastructure and equipment; assisting agriculture businesses that have sustained tremendous losses; granting interest-free loans to individuals, nonprofits, and small businesses; and mobilizing student volunteers across the southern region.

GRANTEES:

TRAUMA SUPPORT AND REHABILITATION
$8.2 MILLION

There is dire need for professional trauma care, especially for those who have lost loved ones, families of hostages, survivors of October 7, those who are injured, first responders, soldiers, marginalized populations, and social service teams. We are mobilizing social workers and trauma professionals, funding recruitment and training for trauma specialists and hotlines, and supporting education departments as they care for students and teachers.

GRANTEES:
The Adler Institute, The American Jewish Joint Distribution Committee, Dror Educational Centers, Enosh – Israel Mental Health Association, ERAN – Emotional First Aid by Telephone and Internet, Eshkol Regional Council, Healing Space, Homiyah – Shalvata Psychiatric Hospital, Ichilov Hospital, Israel Trauma Coalition, The Jewish Agency for Israel, Moshavim: Community Stress Prevention Center, Mazor Mental Health Center, Motiv Herzog Israel Center for the Treatment of Psychotrauma, NATAL – National Israel Trauma Center for Victims of Terror and War, Nazareth Hospital EMMS, Our Brothers, Partnership with the Ministry of Education, SafeHeart, Schneider Children’s Medical Center, Shar Hanegev Regional Council, Sheba Hospital, Shomrim Center for Media and Democracy, Sunflowers, Tamar – Education, Social & Health Services, Tech4Israel Fund, Yemin Orde Youth Village
"In this tiny country, everyone has a close connection to one of the murdered, wounded, or kidnapped. Everyone has a child, relative, or friend risking their lives on the front lines. This is not just a national tragedy, it’s a deeply personal one."

— UJA’s CEO, Eric S. Goldstein
We’re supporting critical needs for eight of the most intensely affected communities: Beeri, Holit, Kfar Aza, Kissufim, Nahal Oz, Netiv Ha’asara, Nirim, and Nir Oz.

**REBUILDING GAZA ENVELOPE COMMUNITIES**

$8.0 MILLION

We are focused on meeting the needs of eight communities that have been recognized by the Israeli government as requiring “intensive care.” They are: Beeri, Holit, Kfar Aza, Kissufim, Nahal Oz, Netiv Ha’asara, Nirim, and Nir Oz. Uninhabitable for the next 1-2 years, these close-knit communities are also those with the largest percentage of murdered and kidnapped residents. Keeping survivors together in the coming 12-18 months will increase community resilience. Our funds will support housing, education, mental health, community, and employment needs.

An innovative partnership between the Business Alliance and UJA

**HOSPITALS AND MEDICAL EQUIPMENT**

$6.3 MILLION

Early on, the need for lifesaving equipment was far greater than what hospitals in the south of Israel had on hand. In parallel, the Health Ministry prioritized emergency preparedness of medical facilities in Galilee and Golan. Funding ensures hospitals remain well-equipped.

**EVACUEES AND SHELTER CITIES**

$5.3 MILLION

- At one point, more than 240,000 Israelis who previously lived in southern or northern communities were displaced. Evacuees have fled to cities that were not well-resourced areas before the war and are now buckling under the strain of absorbing tens of thousands of temporary inhabitants. Our funding is focused on cities housing the largest number of refugees: Eliat, the Dead Sea area, and Tiberias, as well as Nazareth, which is hosting evacuated Israeli Arabs. We are supporting reliable and stable educational programming and activities for youth.

- For evacuees from Ethiopian Israeli other immigrant communities, we are funding a range of culturally sensitive initiatives, including trauma care.

**CARE FOR INJURED SOLDIERS AND THEIR FAMILIES**

$5.2 MILLION

With 360,000 reservists called to join soldiers on active duty, we’re working with nonprofits on the ground to provide essential help and humanitarian aid. We’re also providing funds to support injured, non-active soldiers and the well-being of their families. As the death toll from the ground operation rises, we are focusing funds on caring for families who have lost loved ones.

**RESIDENTS OF NORTHERN ISRAEL**

$4.5 MILLION

To ready the north for a possible Hezbollah incursion, we’re providing funding for civilian preparedness, including emergency equipment and training of volunteers who serve in critical community security and first response roles. While many residents of northern cities have evacuated, we are focused on the needs of those who have remained, typically frail elderly and people with disabilities.

**ARTS CAMPUS BECOMES COMMAND CENTER**

In November 2022, UJA and the Jerusalem Municipality came together to officially open the Jerusalem Campus in the Arts, a major capital initiative undertaken for our centennial. When the war began, the campus quickly transformed into the major volunteer hub in Jerusalem, with thousands of people packing supplies for the displaced, raising funds for soldiers who needed gear, and organizing transportation for those soldiers to get to and from their bases. And students from the acting school traveled throughout the country to displaced families, performing to distract children.

Pictured: Volunteers organizing clothing and other supplies for evacuees.
**2023 SPECIAL REPORT**

**ZAKA – Search and Rescue in Israel**

Magen David Adom, United Hatzalah of Israel, Yad Sarah, of Terror, LeMaanam – Physicians for Holocaust Survivors, Amigour, The Jewish Agency for Israel: Fund for the Victims Welfare of Holocaust Survivors, The Jewish Agency for Israel: Survivors, Aviv for Holocaust Survivors, Foundation for the

**GRANTEES:**


- Ogen: Free Loan Fund

**Our funds provided protective gear for medics who were treating victims even while rockets were incoming.**

**EMERGENCY RESPONSE AND RECOVERY**

$4.3 MILLION

In the earliest days of war, ambulances needed supplies, medics needed protective gear to treat victims even while rockets were incoming, and the bodies of those who died needed to be collected and cared for with dignity. We also supported cash grants to assist victims of terror within 48 hours of the attack. And we ensured the specialized needs of Holocaust survivors who required immediate food, medication, and medical care.


**COMMUNITY MOBILIZATION AND VOLUNTEERISM**

$3.4 MILLION

There has been an incredible outpouring of volunteers coming forward to help. We are supporting the coordination and mobilization of volunteers within Israel so they can best meet humanitarian, educational, economic, and trauma needs.


**STRENGTHENING SOCIAL COHESION**

$3.0 MILLION

- Bedouins and Arab citizens are among the thousands of Israelis injured and killed on October 7. Many live in the zone that Hamas is targeting, in extreme poverty and without access to fortified shelters. Our funding provides emergency services, trauma care, humanitarian assistance, and mobile shelters.

- We are also supporting Arab youth volunteers and short-term, informal education programs to provide safe, structured environments.

- To proactively prevent outbreaks of violence in mixed Jewish and Arab cities, we’re funding conflict-resolution and community building partners. We are also investing in efforts to keep university campuses and students safe.

- The Haredi community has shown an unprecedented interest in serving in the IDF and/or entering the workforce to help fill jobs normally held by reservists who have been called up. UJA has long worked to promote the social and economic integration of Haredim, and there is now a unique window of opportunity to further support this change coming from within Haredi society.

**GRANTEES:**


**DISPLACED ISRAELIS OUTSIDE ISRAEL**

$2.7 MILLION

- Israelis living in, displaced in, or arriving to New York have required a host of supports. We are making microgrants to UJA’s trusted, local partners to provide a variety of services.

- We are also providing funds to day schools and yeshivot enrolling Israeli children to cover costs associated with English-language learning, academic tutoring, mental health support, school lunches, technology, transportation, and supplies.

- In the initial days after October 7, we funded flights to bring Israelis traveling overseas back home. Some were needed to assist in humanitarian aid, security efforts, and the rebuilding of destroyed infrastructure. Others were desperate to return for funerals and family emergencies.

**ECONOMIC RECOVERY**

$1.8 MILLION

With many businesses throughout Israel struggling to survive, our funds are being used to support interest-free loans.

**GRANTEES:**

- Ogen: Free Loan Fund

**2023 SPECIAL REPORT**
RESPONDING TO GENDER VIOLENCE
$610,000
Since October 7, the scope of sexual crimes committed by Hamas has been laid bare. Our funding is providing support to direct victims, first responders, and mental health professionals, as well as those collecting evidence and testimonies to document the atrocities that took place.

GRANTEES: Association of Rape Crisis Centers in Israel, Deborah Institute for Gender and Sustainability Studies, Gali-Golan Rape Crisis Center, The Israel Women’s Network, The Lev Hasharon Mental Health Medical Center, Magen, Maslan: The Negev’s Sexual Assault and Domestic Violence Support Center, Women’s Spirit

FAMILIES OF HOSTAGES
$480,000
Our funding is addressing the mental and emotional well-being of families of hostages and offering direct financial support when necessary. We are also helping to mobilize communities outside of Israel to support the movement to bring every hostage home by supporting the creation of materials for schools, synagogues, JCCs, and other community-based organizations.

GRANTEES: Bring Hersh Home, Hostages and Missing Families Forum, Lev Echad

“...women were not isolated events but part of a broader pattern of gender-based violence on Oct. 7.”

— The New York Times

HIGHLIGHTS OF OUR IMPACT

500,000 Israelis have been supported through volunteer efforts across the country.

100,000 Jews and Arabs living in mixed cities have received programmatic support to maintain peace and prevent violence.

100,000 Israelis have received trauma care.

80,000 residents of southern Israel have received food, trauma care, medical care, and/or emergency cash assistance.

78,000 first responders received emergency supplies, protective gear, and more.

1,250 businesses have received interest-free loans.
The war in Israel precipitated a 360% surge in antisemitic incidents in the United States. On college campuses, anti-Israel rhetoric has crossed the line into harassment and intimidation, leaving many Jewish students to feel they must conceal their Jewish identities. Many Jewish students and teachers in New York City public schools feel similarly unsafe. On the corporate side, far too many Jewish professionals were left to feel alone with their grief after October 7. With our funding and outreach, we’re securing, educating, advocating, and speaking out.

$5.4 MILLION ALLOCATED TO MEET EMERGENCY NEEDS IN NEW YORK RESULTING FROM THE WAR IN ISRAEL.*

SECURITY AT NEW YORK JEWISH INSTITUTIONS
$4.5 MILLION

We’ve allocated additional dollars for our Community Security Initiative (CSI) to support physical security upgrades, increased security guards and patrols, and expansion of overall CSI capacity.

COMBATING ANTISEMITISM ON CAMPUS

On an annual basis, we provide 11 Hillels (serving over 20 campuses) with approximately $2 million in annual support. Now we are making further allocations to:

- **Confront Harassment and Intimidation:** Support for an attorney at the Brandeis Center for Human Rights Law focused on New York-area campuses.

COMMITTEE-BASED ACTIVITIES

We’re working to promote pro-Israel voices in traditional and social media and funding Israel education groups to provide thoughtful content and facilitation for Jewish community members about what is happening in Israel.

* as of December 31, 2023
GLOBAL SECURITY
$500,000

Smaller Jewish communities around the world have little to no resources to address growing antisemitism. Our funding will help these communities acquire and fund extra security measures during this time.

Grantee: The Jewish Agency

CONFRONTING ANTISEMITISM ACROSS NEW YORK

In addition to funding timely, critical initiatives, UJA has been playing a lead role in convening key stakeholders throughout the community to address antisemitism across various sectors. From schools to the workplace to TikTok — we’re educating people about what contemporary antisemitism looks like and how to fight it.

- **Human Resources**: We convened a group of more than 200 HR professionals (with representatives from the U.S. Department of Labor) to discuss these issues, including why half-hearted statements or silence felt like a betrayal to Jewish employees after October 7.

- **Employee Resource Groups**: We’re working with multiple firms to encourage the creation of Jewish employee resource groups (ERGs) so Jewish employees have a sense of community and know they’re not alone.

- **Public Schools**: UJA leaders have met with NYC Schools Chancellor David Banks, offering support and resources through our New York Education Initiative, including help facilitating workshops for schools (parents, teachers, and students) and steps to take to ensure schools respond appropriately and quickly when antisemitic incidents occur.

- **Social Media**: We’ve met with media platforms like TikTok to reduce antisemitic content and misinformation.

SOLIDARITY WITH ISRAEL
RALLIES, BRIEFINGS, AND MISSIONS

From the earliest days of the war, we offered community members who were searching for reliable information access to briefings with top experts and our partners on the ground. Speakers have included former Prime Minister Naftali Bennett, former Ambassador Michael Oren, and Representative Ritchie Torres, who all imparted their nuanced analysis. We also heard from the loved ones of Israelis who have been kidnapped, including Rachel Goldberg and Jon Polin, who shared their grief and tireless fight to bring the hostages home. We accompanied Governor Kathy Hochul on a trip to Israel and have sent local rabbis, elected officials, and philanthropic leaders on missions to demonstrate New York’s unshakable bond with the Jewish state.
On November 14, 2023, an estimated 290,000 gathered on the National Mall for the March for Israel — the largest gathering for a Jewish cause in American history. Speakers included House and Senate leadership in a rare demonstration of bipartisanship.

UJA organized and funded 133 buses. We reached out to hundreds of JCCs, day schools, synagogues, and Hillels — empowering many thousands of people of all ages from every corner of New York to come down to D.C.
In fiscal year 2023, the sense of acute crisis we had felt during the pandemic and the early days of the Ukraine war somewhat receded. Still, urgent issues on multiple fronts demanded our attention and a strategic response. We pursued innovative approaches to a range of pressing challenges and opportunities. And while we never anticipated war in Israel, we strengthened our network of nonprofits and the relationships that would prove critical in crisis.

- We fought poverty with a comprehensive, dignity-first approach.
- We confronted antisemitism and helped ensure community security.
- We strengthened an inclusive Jewish and democratic state, celebrating Israel at 75.

And the thread that connected it all — our investment in Jewish life, the places and experiences where community takes root.

POVERTY AND HUNGER
- UJA-supported 15 digital food pantries (serving another 35 satellite locations), which provided groceries to 63,000+ people and distributed 2.6 million pounds of food. Clients used an online ordering system, choosing foods they want, curbing waste, and saving time.
- Our Jack and Shirley Silver Hub in Queens continued to offer a range of social services — from food pantries to employment services to legal counsel — all in one welcoming space. A new Brooklyn Hub is slated to open in spring 2024.
- We brought social service supports to CUNY Hillels, recognizing that low-income students — some the first generation to attend college — are dealing with food insecurity and mental health issues, and we can reach them most effectively in the same place they come seeking Jewish community.

WAR IN UKRAINE
We’ve allocated $25 million in emergency funding since the war in Ukraine began in February 2022. After the first year of war, we continued to provide critical support for those who remained in Ukraine living in a chronic crisis. We also shifted our focus from exclusively addressing acute needs to helping refugees in New York and Israel acclimate for longer-term stays. To help them find work and settle into new communities, we supported case management, mental health services, summer camp and day school scholarships, legal services, vocational training, and more.

MENTAL HEALTH
Since the pandemic unleashed a massive mental health crisis, we increased funding to mental health programs and nonprofits that serve unique New York Jewish communities, recognizing the need for culturally competent care. We’ve funded in-house psychologists at schools, camps, and JCCs; peer-to-peer programming for youth and parents; training and professional development, as well as a professionals’ support helpline. In total: Our support across our network provided for more than 763,000 hours of mental health services.

Our digital food pantries provided groceries to 63,000+ people.

Our Community Security Initiative (CSI), an initiative with JCRC-NY, worked with 2,400 Jewish institutions — synagogues, JCCs, camps, social service organizations, and more — throughout the entire New York area providing guidance about physical security upgrades, facilitating trainings on topics like active shooter training, and securing government funds.
- In partnership with JCRC-NY, we continued bringing influencers to Israel, including Mayor Eric Adams just a few months before the war in Israel began.

Our advocacy helped secure $340 million in nonprofit security grants from federal and state sources.
HOLOCAUST SURVIVORS
To care for the 13,000 Holocaust survivors who live in the New York area, a disproportionate number living in poverty, our Community Initiative for Holocaust Survivors and annual campaign provided nearly $7.6 million. These funds supported access to a range of life-enhancing services, including food delivery, case management, emergency cash assistance, and friendly visits.

JEWISH LIFE
We supported a broad array of Jewish spaces, programming, and experiences knowing that everyone is looking for Jewish life in different — but equally valid — ways.

- Camp: We continued the transformation of our 500+ acre Henry Kaufmann Campgrounds — where 7,000 campers and 1,500 counselors gather every summer. This year, scholarships made it possible for 140 Ukrainian children to attend camps throughout our network.

- Leaders: We funded a range of leadership programs, including for recruitment of and training for early childhood educators for JCCs and synagogues, CITs at Jewish summer camps, internships for college students to introduce them to careers in Jewish professional spaces, and more.

OLDER ADULTS
Every older person has their own needs, struggles, heartache, and aspirations. We’ve been there for them all:

- For active older adults, we created VERVE 55+, offering meet-ups and cultural events on Long Island and in Westchester.

- For LGBTQ+ older adults who have a history of trauma, we supported case management, social programs, and mental health services.

- For those with Alzheimer’s disease and other dementias, we invested in dementia-friendly NORCs (Naturally Occurring Retirement Communities), and music therapy that comforts patients and reduces the family caregiver burden.

- For the isolated elderly, 65+, we funded “connection specialists” at JCCs on Long Island and in Westchester to help people connect with each other and with social service resources.

DISASTER RELIEF
- When massive earthquakes hit Turkey and Syria, our partners jumped into action: JDC provided the Turkish Jewish community with food, shelter, and medicine and partnered with local NGOs to provide humanitarian aid to the broader community and medical supplies to severely damaged hospitals. The Jewish Agency’s shaliach in Istanbul worked with the Jewish community to assess needs and provide emergency assistance. Beyond the Jewish community, we also funded search and rescue efforts and food, medicine, and other humanitarian aid.

- When devastating fires ravaged Maui, we allocated funding to our partner the Afya Foundation to provide critical medical supplies and durable medical equipment to support people who were injured but could not access medical care.

ISRAEL
In April 2023, we celebrated Israel at 75 — a milestone that now carries another layer of emotional resonance. We said then and we say now even more emphatically: We never take the miracle of the modern state of Israel for granted. Throughout fiscal year 2023, as the country dealt with fraught internal politics, we doubled down on what have long been our core areas of funding, with programs and nonprofits that promote social and economic mobility for all citizens of Israel, foster religious pluralism, and strengthen a shared society for all. As we always do, we continued to strengthen nonprofits in Israel, which ultimately allowed them to play an integral role in the immediate response to the Hamas attacks.

EVERY OLDER PERSON HAS THEIR OWN NEEDS, STRUGGLES, HEARTACHE, AND ASPIRATIONS. WE’VE BEEN THERE FOR THEM ALL.
## Fiscal Year 2023

### Key Financial Results

#### Total Revenue:
- **$231,145** (dollars in thousands)

#### Total Grants and Expenses:
- **$269,239** (dollars in thousands)

### Grants and Other Programs

<table>
<thead>
<tr>
<th>Focus Area In New York, Israel, and Around the World</th>
<th>(in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caring for People in Need</td>
<td>$77.9</td>
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<tr>
<td>Nurturing Mental Health and Well-Being</td>
<td>$39.3</td>
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<tr>
<td>Combating Poverty</td>
<td>$38.6</td>
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<tr>
<td>Strengthening Jewish Life</td>
<td>$70.1</td>
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<tr>
<td>Deepening Jewish Identity</td>
<td>$47.7</td>
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<tr>
<td>Building Jewish Community</td>
<td>$22.4</td>
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<tr>
<td>Responding to Antisemitism and Global Crises</td>
<td>$22.2</td>
</tr>
<tr>
<td>Building Coalitions and Promoting Inclusion</td>
<td>$15.1</td>
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### By Geography

<table>
<thead>
<tr>
<th>Region</th>
<th>(in millions)</th>
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<td>New York</td>
<td>$118.7</td>
</tr>
<tr>
<td>Israel</td>
<td>$31.1</td>
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<tr>
<td>FSU</td>
<td>$17.9</td>
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<tr>
<td>National</td>
<td>$8.7</td>
</tr>
<tr>
<td>Europe &amp; Other International</td>
<td>$7.9</td>
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</tbody>
</table>

In FY 2023, UJA’s total grant expense was $185.3 million. This includes the rental value of property used by agencies without charge and is net of write-offs of prior year grants. Individual grants may be attributed to more than one focus area.

### Fiscal Year 2023

### Grants and Other Programs

#### Where the Dollars Go

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>(in millions)</th>
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<tbody>
<tr>
<td>Caring for People in Need:</td>
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<tr>
<td>– Nurturing Mental Health and Well-Being</td>
<td>$17.9 (5%)</td>
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<tr>
<td>– Combating Poverty</td>
<td>$22.2 (12%)</td>
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<tr>
<td>Strengthening Jewish Life:</td>
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<tr>
<td>– Deepening Jewish Identity</td>
<td>$47.7 (18%)</td>
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<tr>
<td>– Building Jewish Community</td>
<td>$22.4 (12%)</td>
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<tr>
<td>Responding to Antisemitism and Global Crises</td>
<td>$22.2 (12%)</td>
</tr>
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</table>

### 2023 Financial Resource Development Results

#### Dollars in Millions

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Pledges to the Annual Campaign and Other Annual Giving Pledges</td>
<td>$173.0</td>
</tr>
<tr>
<td>Planned Giving &amp; Endowments (Gross Receipts, Including Supporting Organizations)</td>
<td>$44.8</td>
</tr>
<tr>
<td>Capital Development, Special Initiatives and Other (Pledges, Including Gifts Received on Behalf of Beneficiary Agencies)</td>
<td>$16.5</td>
</tr>
<tr>
<td>Total</td>
<td>$234.3</td>
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</tbody>
</table>

Fundraising expenses as a percent of revenue: **15.9%**
## Condensed Statement of Activities

### Years Ended June 30, 2023 and 2022

<table>
<thead>
<tr>
<th>(dollars in thousands)</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue and Gains (Losses)</strong></td>
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<td></td>
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<tr>
<td>Net contributions (annual/special giving)</td>
<td>$166,450</td>
<td>$188,153</td>
</tr>
<tr>
<td>Endowment contributions, legacies and bequests</td>
<td>34,263</td>
<td>45,517</td>
</tr>
<tr>
<td>Split-interest agreement (net of changes in value of $(722) in 2023 and $(3,580) in 2022)</td>
<td>2,986</td>
<td>(3,390)</td>
</tr>
<tr>
<td>Donated goods and services</td>
<td>150</td>
<td>150</td>
</tr>
<tr>
<td>Amounts raised on behalf of others</td>
<td>19,760</td>
<td>18,784</td>
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<tr>
<td>Net contribution revenue, including amounts raised on behalf of others</td>
<td>223,609</td>
<td>249,214</td>
</tr>
<tr>
<td>Less: amounts raised on behalf of others</td>
<td>(19,760)</td>
<td>(18,784)</td>
</tr>
<tr>
<td>Net contribution revenue, excluding amounts raised on behalf of others</td>
<td>203,849</td>
<td>230,430</td>
</tr>
<tr>
<td>Net investment income (loss)</td>
<td>10,164</td>
<td>(2,378)</td>
</tr>
<tr>
<td>Net appreciation (depreciation) in fair value of investments</td>
<td>4,476</td>
<td>(9,579)</td>
</tr>
<tr>
<td>Endowment spending rate used in operations</td>
<td>43,365</td>
<td>39,053</td>
</tr>
<tr>
<td>Rental, service and other income</td>
<td>27,296</td>
<td>27,630</td>
</tr>
<tr>
<td>Total revenue and gains</td>
<td>289,150</td>
<td>285,156</td>
</tr>
<tr>
<td><strong>Grants and Expenses</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>185,290</td>
<td>176,393</td>
</tr>
<tr>
<td>Other program services</td>
<td>25,831</td>
<td>21,929</td>
</tr>
<tr>
<td>Total grants and other program services</td>
<td>211,121</td>
<td>198,322</td>
</tr>
<tr>
<td>Fundraising</td>
<td>34,710</td>
<td>34,199</td>
</tr>
<tr>
<td>Management and general</td>
<td>34,208</td>
<td>19,873</td>
</tr>
<tr>
<td>Total expenses</td>
<td>289,150</td>
<td>285,156</td>
</tr>
<tr>
<td>Increase in net assets before investment returns not utilized in operations and postretirement plan adjustments</td>
<td>19,911</td>
<td>32,762</td>
</tr>
<tr>
<td>Investment returns not used in operations</td>
<td>33,900</td>
<td>(147,094)</td>
</tr>
<tr>
<td>Postretirement benefit changes not included in net periodic benefit cost</td>
<td>139</td>
<td>705</td>
</tr>
<tr>
<td>Increase (decrease) in net assets</td>
<td>$53,950</td>
<td>$(113,627)</td>
</tr>
</tbody>
</table>

---

## Condensed Balance Sheet

### June 30, 2023 and 2022

| (dollars in thousands) | At June 30 | |
|------------------------|------------|
| **Assets** | | |
| Cash | $26,304 | $34,564 |
| Contributions receivable, net | 102,528 | 98,985 |
| Other assets and receivables | 128,446 | 108,518 |
| Amounts held on behalf of other agencies | 3,351 | 52,269 |
| Investments | 1,272,408 | 1,236,916 |
| Right-of-use asset — operating leases | 3,033 | 3,679 |
| Assets held under charitable trust agreements | 24,437 | 23,738 |
| Fixed assets, net | 47,522 | 49,262 |
| Total assets | 1,608,029 | 1,607,931 |
| **Liabilities and Net Assets** | | |
| Liabilities: | | |
| Accounts payable, accrued expenses, and other liabilities | $28,440 | $26,674 |
| Grants payable | 25,644 | 25,440 |
| Amounts held on behalf of other agencies | 3,361 | 52,269 |
| Lease liabilities | 3,414 | 4,109 |
| Liabilities under charitable trust and annuity agreements | 32,310 | 31,631 |
| Long-term debt, net | 65,374 | 71,902 |
| Accrued postretirement benefits | 2,756 | 3,116 |
| Total liabilities | 161,289 | 215,141 |
| Net assets: | | |
| Without donor restrictions | | |
| (including board designated of $455,838 in 2023 and $428,241 in 2022) | 634,826 | 581,534 |
| With donor restrictions | 811,914 | 811,256 |
| Total net assets | 1,446,740 | 1,392,790 |
| Total liabilities and net assets | $1,608,029 | $1,607,931 |
2022–2023
UJA-FEDERATION OF NEW YORK LEADERSHIP

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Stephen D. Solender
John S. Rushay

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Patricia Silvers
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Debra Wasserman
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Susan K. Stern
James S. Tisch
Wima Tisch
Lary Zicklin

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Of blessed memory

* Executive Committee Member
** Of blessed memory
*** Individuals, families, firms, and foundations who have supported UJA-Federation with lifetime giving of $10 million or more.
2022–2023
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CHAIR, UJA YOUNG LEADERS
Spencer Herbst*

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Stephen D. Solender
John R. Russak

2023, SPECIAL REPORT
Donya Levine
Director, Content Development

* Executive Committee Member
** Of blessed memory
We’ve always known our community to be extraordinary — but in this crisis you have shown a generosity that will be long remembered, a fearless resolve, and a spirit of unity that gives so many strength and hope.

Words of thanks feel insufficient to express the depth of our gratitude.
UJA-Federation of New York cares for Jews everywhere and New Yorkers of all backgrounds, responds to crises close to home and far away, and shapes our Jewish future.

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