

# Donor Plans Legacy of Community Health



Linda Cary, a resident of Upper Montclair, is focused on the future — not merely her own, but that of her community. She recently amended her will to include the newly established Mountainside Health Foundation as a primary beneficiary of her estate. This thoughtful act of kindness and planned

giving will promote health and wellness for generations to come.

“We’re born into a country that allows us to grow and achieve. We should be grateful for that opportunity and have a sense of giving back rather than consuming everything we have,” said Ms. Cary. “We all leave this earth some day and need a reason for being here... perpetuating an institution that will help others enjoy good health gives my life more purpose.”

Over the years, Linda Cary has maintained strong ties to the Essex County community as well as a longtime interest in public health and philanthropy. She was raised in Cedar Grove and her late mother was a graduate of the Mountainside Hospital School of Nursing. “My parents were instrumental in forming my outlook on life and teaching me to be a responsible citizen,” she noted.

Instilled with a solid work ethic, Ms. Cary led a distinguished 35-year career in the insurance industry. She was the first female

executive at Royal Insurance Co., based in New York City, and ultimately established her own insurance agency.

Ms. Cary has been equally successful in her charitable endeavors. She is an active member and past president of Union Congregational Church in Montclair, and is a trustee for The United Church of Christ Pension Boards, serving on the health benefits committee. She has also served for three years as Chair for the “Play for P.I.N.K.” golf tournament, hosted by the Upper Montclair Country Club to raise money for breast cancer research.

Her focus, however, has been on impacting community health. Ms. Cary is energized about the Mountainside Health Foundation’s refined mission. “The process is very exciting, with broader opportunities for preventing illness and educating people on the importance of good health,” she explained.

Ms. Cary plans on donating her entire estate to charity, with a substantial sum allocated to the Mountainside Health Foundation. “This is a brand new organization that comes with a lot of history and a unique chance to be more than it was before.”

Linda Cary reminds like-minded benefactors to revise their wills, if necessary, to reflect the institution’s new name so their generosity, like hers, can continue to advance the health of area residents. **EM**

*www.mountainsidehealthfoundation.org*

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CREATING HEALTHIER COMMUNITIES

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# FoundationMatters

News and information about the Mountainside Health Foundation ■ Spring 2008

## MOUNTAINSIDE HEALTH FOUNDATION: POISED TO LAUNCH INITIATIVES TO CREATE HEALTHIER COMMUNITIES

On April 30, 2008, the Honorable Harriet F. Klein, J.S.C. decided that the charitable funds held by the Mountainside Health Foundation are officially designated to be used for the Foundation's mission to strengthen health and wellness in communities traditionally served by Mountainside Hospital. This concluded the legal process known as *Cy Pres* (see story on page 2), and positioned the Foundation to begin making grants to advance good health practices, wellness education, disease prevention and treatment.

The Mountainside Health Foundation, formerly known as the Mountainside Hospital Foundation, is an independent, self-governing public charity with approximately \$30 million in assets. The Foundation is dedicated to creating healthier communities by serving as a catalyst for positive change and health care innovation.

"We are energized by this new direction and the potential to make a lasting and meaningful impact in our communities," stated M. Ann Johnson, Chair, Board of Trustees, Mountainside Health Foundation. "We intend to serve as a proactive community health advocate."

As a public health care charity, the Mountainside Health Foundation has the dual role of raising funds and making grants to qualified, non-profit health agencies, schools, and social service organizations. Ultimately, the Foundation hopes to inspire partnerships with other foundations and organizations. "Our goal is to leverage our resources to achieve a greater impact than we could alone," noted Izumi Hara, Vice Chair of the Board.

As an initial step, the Foundation conducted in-depth research to explore local health needs. The effort identified four areas of highest priority: improving access to health care; mental health; obesity/nutrition/healthy lifestyles; and seniors and aging.

*continued on page 2*



## Our Mission

*To strengthen health and wellness in communities traditionally served by Mountainside Hospital.*

## Our Vision

*To create healthier communities by supporting and advancing good health, wellness education, and disease prevention and treatment.*

## We Will

- *Serve as a catalyst and innovator for new initiatives*
- *Partner with other area foundations whose interests align with ours*
- *Undertake funding only for projects where we can make a difference*

**Not-for-profit organizations located in, or providing direct service to the following communities will be eligible for grants from the Mountainside Health Foundation:**

|              |                |
|--------------|----------------|
| Bloomfield   | Montclair      |
| Caldwell     | North Caldwell |
| Cedar Grove  | Nutley         |
| Clifton      | Roseland       |
| Essex Fells  | Verona         |
| Fairfield    | West Caldwell  |
| Glen Ridge   | West Orange    |
| Little Falls |                |



**MOUNTAINSIDE HEALTH FOUNDATION: POISED TO LAUNCH INITIATIVES TO CREATE HEALTHIER COMMUNITIES...** *continued from page 1*

With this in mind, the Foundation is pleased to announce three major initiatives that will be launched in the Fall of 2008. Two of these are aimed at area children. Through TEAM HEALTH, local public school districts were invited to submit proposals for school-based initiatives that promote healthier eating and lifestyles. One of the primary goals of TEAM HEALTH is to combat childhood obesity, which has doubled among American children and tripled among adolescents over the past 20 years. Childhood obesity is a strong predictor of adult obesity, which contributes to chronic diseases such as heart disease, cancer, stroke and diabetes.

TEAM HEALTH grants have been awarded to public schools located in Montclair, Glen Ridge, Bloomfield, Caldwell/West Caldwell, West Orange and Cedar Grove.

A second initiative, STARTING OUT HEALTHY will promote healthy eating and increased physical activity to four- and five-year-old children enrolled in local subsidized pre-school programs. Programs for Parents, Inc. in Montclair will implement this innovative project.

The Foundation’s Golf Tournament held on May 19 raised funds for TEAM HEALTH; a matching grant of all net proceeds from the Golf outing has been allocated to STARTING OUT HEALTHY. Nearly \$80,000 will be distributed for these inaugural grants.

The Foundation has also committed \$32,000 to fund an initiative that will address the staffing problems that cause financial difficulties at many local volunteer ambulance units. This program will partner the resources of Montclair State University’s Emergency Medical Services (MSU EMS) with the needs of the Montclair Volunteer Ambulance Unit (MVAU). The Foundation’s grant will be applied to scholarships of \$4,000 each to eight students enrolled at Montclair State University. As part of the scholarship agreement, each student will commit to volunteering as an EMT at the MVAU. If this program proves to be a success, the Foundation will consider expanding it to other rescue squads in the West Essex region, as well as to students enrolled at other local colleges.

Subsequent projects will address other vital health issues and provide resources for new or expanded programs offered by eligible non-profit organizations. Funding guidelines and applications are posted on the Foundation’s website, at [www.mshfoundation.org](http://www.mshfoundation.org).

“The Mountainside Health Foundation is a *community* foundation that will thrive with the involvement of residents, donors and other partners for enriching community health,” added Mrs. Johnson. “Together, we can all make a difference.” **FM**

*Banners announcing TEAM HEALTH grants will be displayed by the funded schools.*

**The Cy Pres Process**

As a result of the sale of Mountainside Hospital to Merit Health, a for-profit health system, the Mountainside Health Foundation applied to the Superior Court of NJ in Essex County to redesignate donations that have been given to support Mountainside Hospital. This sale to a for-profit health care provider, completed in June 2007, required the Foundation to file a *Cy Pres* application.

*Cy Pres* is derived from French and means “as near as possible.” The *Cy Pres* process allows the Court to redirect the use of charitable funds to other charitable purposes when the donor’s original intent has been frustrated. In this case, it is because Mountainside Hospital can no longer be the direct recipient of those charitable contributions. The Foundation successfully argued that its restated health care mission in support of the communities traditionally served by Mountainside Hospital made it the logical and proper successor for the use of those funds.

## Court Ruling Clears Way for Continued Support by the Foundation of the Chaplaincy Program, Nursing School Scholarships and Nurse Awards

At the Cy Pres hearing on April 30, 2008, the Honorable Harriet F. Klein, J.S.C. decided, among other things, that the continued support by the Mountainside Health Foundation of the Chaplaincy Program, nurse scholarships for students enrolled in the Mountainside Hospital School of Nursing, and nurse recognition awards for nurses who provide bedside care at the Hospital, are charitable activities benefiting the individual recipients and the community at large. Under the relevant law concerning private benefit, the Court found that these initiatives provide only incidental benefit to the Hospital.

This part of the Court’s decision addresses the Foundation’s concerns about the continued support of these programs adversely affecting the Foundation’s tax exempt charitable status. The way is now clear for the Foundation to continue its historic support of these charitable programs.

“The Foundation Board has an obligation to safeguard the charitable tax-exempt status of the Foundation,” said M. Ann Johnson, Chair, Board of Trustees, Mountainside Health Foundation. “We are pleased that the Court decision found that these programs are charitable in nature and primarily benefit the communities served by the Foundation. This paves the way for continued Foundation support.” **FM**

### *Getting to Know the Health Status of our Communities*

For the past several months, representatives from the community have joined Foundation Trustees and staff – led by Pam Scott, Chief Foundation Officer, and Kathy Smith, Grants Program Officer – in Task Force meetings to explore the area’s greatest health needs. The Task Forces are charged with studying gaps in services, and to proactively seek opportunities to fund projects where the Foundation will make the greatest impact. Additional meetings have sought input from area social service agencies and health departments, to develop a more complete understanding of the issues, and to generate ideas about how to prioritize the Foundation’s funding.

In addition, the Foundation seeks grant proposals from organizations of all budget sizes, and encourages eligible charitable organizations to apply for funding. The first step is to complete a simple, one-page pre-application outlining the scope of the project. The pre-application, funding guidelines, frequently asked questions, and other information are all available at [www.mshfoundation.org](http://www.mshfoundation.org). **FM**



**Mountainside Health  
FOUNDATION**  
CREATING HEALTHIER COMMUNITIES

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