

COAST

REFLECTING SOUTHERN CALIFORNIA'S FINER LIFESTYLE AUGUST 2002



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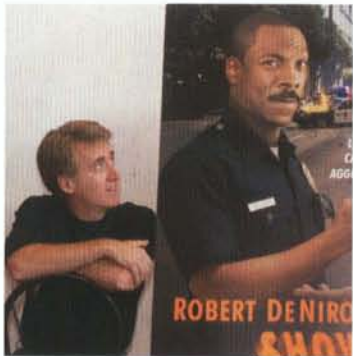


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ABOUT THE COVER

This month's Coast cover is an oil on canvas by Laguna Beach artist and Festival of Arts Board President Scott Moore. This painting, along with other new works, can be seen at the Festival of Arts through September 1.



RARE AND NOBLE CAUSE

The Orange County Community Foundation is committed to facilitating philanthropy in Orange County by connecting those who care with those working to make a difference

“To give away money is an easy matter and in any man’s power. But to decide to whom to give it and how much and when, for what purpose and how, is neither in every man’s power nor an easy matter. Hence, it is that such excellence is rare, praiseworthy and noble.” – ARISTOTLE

When I saw Aristotle’s quotation on a bookmark included in the Orange County Community Foundation’s information packet, I was amazed by the foresight of this third century Greek philosopher who was able to capture the essence of giving in the 21st century. Orange County

Community Foundation (OCCF) President Shelley Hoss agrees. “When we saw the quote, we knew it belonged as part of our message. The foundation’s goal is to help inspire the excellence that Aristotle espoused.”

If you’re wondering who the Orange County Community Foundation is, you’re not alone. It is one of the best kept secrets in the county. However, there are over 600 community foundations in the country, and 30 of them are right here in California. Even more surprising is the fact that the first one was launched in 1914, almost a century ago, in Cleveland, Ohio. Of the 200 donors who make up the foundation’s membership, *Coast* chose to profile Hoss, as well as three couples who represent the diverse makeup of this remarkable organization.

By Donna Bunce | Photos by Stephan Brown



Keith & Judy Swayne, Founder, Orange County Community Foundation

KEITH AND JUDY SWAYNE

Eight industrial families founded The Cleveland Foundation, which remains a major institution in the country today," says Judy Swayne, who founded the Orange County Community Foundation in 1989. "Cleveland has been the beneficiary of a group of renowned museums, parks, hospitals, and concert halls through the foundation due to the many donors who have participated over the years," says Swayne.

Swayne became interested in setting up the foundation in Orange County when she did some work for the California Community Foundation, based in Los Angeles, in the mid-80s. "I thought, 'This is a terrific idea. Let's do it on our own,'" she says.

Working as executive assistant to the Honorable Thomas F. Riley, 5th District, Orange County Board of Supervisors, from 1974 to 1985, Swayne had interfaced with a cadre of community leaders, many of whom she recruited to develop a major institution for endowment towards the charitable needs of the county. "Tom was almost like a father to me," says Swayne, "and he was very helpful in starting the foundation." She couldn't believe it when the first donation the OCCF received was from The James Irvine Foundation, which had awarded her a scholarship to Whittier College. "I realized the power of endowment twice," she says.

Swayne, President of the OCCF for 10 years, retired in 1999, leaving some impressive accomplishments. The foundation had managed assets of more than \$72 million and was ranked in the

top 11% for new asset growth among the 540 community foundations nationwide. Over \$4 million was granted to charitable causes in 1999 and more than \$30 million of the assets were held in permanent endowment. "It was a demanding, intense time," she says, "but also a lot of fun, and I met many wonderful people who were doing exceptional things."

Swayne's husband Keith is no less dynamic. A graduate of the University of Oregon with a bachelor's degree in economics, he met and married Judy when she was teaching junior high in Marin County and he was attaining an MBA with honors from UC Berkeley. After a short stint with Dole Pineapple and four years as an officer in the U.S. Navy, including duty in Vietnam, Keith joined the family business when his father became ill. As President/CEO of Case Swayne Co., a Corona, California-based food processor, he transformed the company from a traditional canner and freezer of fruits and vegetables to a developer and processor of specialty sauces and seasonings, increasing sales revenues six-fold from 1989 to 1999. Following the sale of the company to Best Foods in 1999 and a merger with Milwaukee Seasonings to form International Food Solutions, a \$240 million subsidiary, Keith served as CEO of the new entity and led the integration process, retiring from active management in June, 2000. "I enjoyed helping people become successful in business as well as in the advisory work I do now," he says.

The Laguna Beach couple continues to donate to their favorite charities through the Keith & Judy Swayne Family Fund they established through the OCCF three years ago. "The beauty of the community foundation is that we can implement all of our charitable giving through one convenient source with significantly better tax benefits," Judy says. "For instance," Keith says, "Case Swayne established a scholarship fund through the OCCF for graduating seniors in Orange and Riverside counties in the early 90s, and the foundation helped us find the scholars. If you do it yourself, you have to establish an infrastructure to screen and select, and that takes time and effort."

Through what the foundation calls "donor-advised giving," the Swaynes' philanthropic interests include the following categories: educational instruction, social justice, youth, and the arts. Judy continues to serve on the OCCF board as well as the boards of Whittier College and Law School, Hoag Hospital Foundation, Human Options, and Arts Orange County, which she helped found.

Keith is active on many industry and business boards, and his favorite non-profit involvement includes the Orange County Human Relations Council, which he helped found, and the Boys and Girls Clubs of America, for which he serves as a National Trustee, along with the Boys and Girls Club of Laguna Beach. "I have a personal commitment to helping better understand people with diverse backgrounds," Keith says, referring to his work with the Human Relations Council. His interest in the Boys and Girls Clubs stems from his youth, when he says the club filled a void for him and was a safe place to go.



PHOTO: PEGGY O'DONNELL

Shelley Hoss, President, Orange County Community Foundation

OCCF PRESIDENT SHELLEY HOSS

Judy Swayne is very complimentary of Shelly Hoss and her leadership. "Shelley and her wonderful board are doing a fabulous job in the growth of the foundation," she says. Hoss, with 16 years of non-profit experience at Orangewood Children's Foundation and Girls, Inc., took the reins two years ago, and one of the first things she did was to organize a strategic planning process. "It allowed us to align our board, staff and community leaders around a new direction for the OCCF," she says, "that of positioning the foundation to play a key leadership role in promoting philanthropy in the community."

The 15-member, highly respected board of governors, led by Chairman Bob Grant, managing partner of Deloitte & Touche, crafted a strategic plan with the following mission statement: "To encourage, support and facilitate philanthropy in Orange County through donor services and community partnerships."

The OCCF assists donors in giving strategically and effectively, as well as building strong relationships with the Orange County non-profit community. More than \$10 million was distributed last fiscal year by the foundation and its donors, nearly double that of the previous year. In addition, the foundation, for the first time in its history, gave a series of two-year, capacity-building grants totaling \$387,937 from its endowment to five deserving charities. Also of note, in alliance with many major California foundations over the past two years, new funding of more than \$5.65 million was given to Orange County non-profits solely because of the foundation's stewardship role.

"These accomplishments are significant for an organization

as young as the Orange County Community Foundation," says Hoss, "but there is much more to be done. We aspire to do nothing less than transform philanthropy in Orange County." She says that community foundations have experienced extraordinary growth over the past five years and that several foundations that were the size of the OCCF five years ago now have assets in excess of \$400 million.

HYLA AND RICHARD BERTEA

Shelley is taking the foundation to the next level," says board member Hyla Berteia, who, with husband Richard, also praises Judy Swayne for her vision and tenacity in making the OCCF such a success. Not surprisingly, Hoss agrees and says, "Judy Swayne is the reason we have a community foundation in Orange County today."

The Berteas were both born in Los Angeles several years apart and are graduates of the University of Southern California – Hyla with a Bachelor of Science degree in education and Richard with a BA in economics. While Hyla was in high school and college, Richard was in the U.S. Marine Corps flying jets in active duty from 1951 to 1955 and in the Reserve from 1955 to 1960.

While teaching school in the inner city in Los Angeles in the early 60s, Hyla met Richard, they married the next year and moved to Orange County in 1966, settling in Corona del Mar.

Earlier, in 1960, Richard's love of flying and aviation (he had

Hyla and Richard Berteia



obtained his pilot's license at the tender age of 17), had prompted him to join the family business, the Berteia Corporation, a leading aerospace supplier of hydraulic flight controls. Following the company's move to Irvine in 1966 and its going public in 1968, in 1978 Berteia Corporation merged with Parker Hannifin, a producer of motion control components and systems for industrial, automotive, aviation, space, and marine markets, and Richard served as chairman of the executive committee and a director until his retirement in 1993.

Richard's charity involvements over the years have included Young Presidents' Organization, Big Brothers of Orange County, Orange County Management Council, and Children's Surgical Research Foundation. His philanthropic support continues through Hoag Hospital, Chapman University, Boy Scouts of America, YMCA, Boys & Girls Clubs, Orangewood Children's Home, CHOC, Women in Aviation, and many, many more.

No less involved in the charity arena, Hyla has served as Co-Commissioner of Gymnastics for the 1984 Olympic Games, has volunteered for the Newport Harbor Junior League, and USC's Women's Athletic Board as well as its Orange County Planning and Development Council. She continues to support Lewis and Clark College, Angelitos de Oro (Big Brothers and Big Sisters of Orange County), and is a founding member and recent three-year chairman of Circle 1000 in support of the Hoag Cancer Center as well as a Hoag Foundation board member. Outside of her charity involvements, Hyla is on the board of Semptra Energy, which includes the Southern California Gas Company and San Diego Gas & Electric.

Richard collects and restores vintage warbirds and frequently flies the air show circuit, and Hyla has the distinction of piloting the last female cross-country Powder Puff Derby from Palm Springs to Tampa in 1976.

The Berteas established the Berteia Family Foundation in the early 80s to support their charitable giving, and when Hyla joined the Orange County Community Foundation board in 1995, they expanded their giving through the OCCF. "It forces you to examine how you're going to use your philanthropic dollars," Richard says. "And, it's just a more manageable way to distribute funds to charities because the community foundation does the administrative work for you and evaluates the merits of the different charities."

"Hoss and her team line up information on the tax laws, issue quarterly reports of our giving and research charities for us," says Hyla. "And they turn that information over to us in a very timely manner. The biggest advantage? It takes away the administrative details and helps us focus on our giving."

Hyla has established her own fund called the Hyla Berteia Fund through the OCCF. "I'm able to give to the causes I particularly espouse," she says.

Both the Berteas and the Swaynes have instilled the value of giving in their children, who will direct the funds when they are no longer able to.



Dan and Cathy Campbell with son Danny

CATHY AND DAN CAMPBELL

Cathy and Dan Campbell are new to the OCCF family and represent what can happen when a terrible, incurable illness takes the life of your three-and-a-half-year-old boy, and your grief becomes a battle cry to find the cure for the horrific genetic disease that took him. They have established the David P. Campbell Foundation for Pediatric Mitochondrial Disease Research as a donor-advised fund at OCCF that will distribute fellowship funds to researchers committed to finding a cure. The Campbells, who live in Mission Viejo with eight-year-old son Danny, have committed themselves to funding a \$250,000 research fellowship – the only one in the country – that will research mitochondrial diseases. "OCCF is an excellent resource for us," says Cathy, "because they can match us with potential donors and advise us on our fundraising."

The couple grew up in the Baltimore, Maryland area, graduating from the University of Maryland, before meeting at a friend's barbecue in 1989. Dan had gone on to Georgetown University for his International MBA and Cathy had received a master's in journalism from her alma mater. Dan was working as a senior research analyst in money management and Cathy was a marketing VP for a national health services firm when they moved here in 1998. Both sons, Danny and David, were born in Maryland.

David, with his mop of red hair and sparkling blue eyes, seemed like any other healthy baby until he was five-and-a-half months old. "He had some staring episodes, double ear infections, and became like a floppy doll," says Cathy. From that period on, Dan and Cathy took him to see eight out of 10 of the country's best pediatric neurologists in a quest to find out about David's problems. "We took David to the best, and they were all perplexed," says Dan.

Until the end, however, David really never had a bad day, according to his parents. "He had problems with his spine and had to walk with a walker, but he just smiled and moved on," says Cathy. "We had him in and out of hospitals and clinics constant-

ly trying to find a diagnosis, and all the while David just charmed everyone he came in contact with. His spirit was contagious; you just couldn't have a bad day when you were around him."

David spent his last days in pediatric ICU at CHOC, where his mom and dad lived for 10 weeks. "We knew it was serious, but the doctors thought David had an immunological condition, and we actually thought he was getting better. Near the end, when David's breathing, motor skills and sight were affected and he slipped into a coma, it didn't look promising." At the behest of the CHOC doctors and through the efforts of Blue Cross to pull the necessary strings, David was moved by air ambulance to Children's Hospital San Diego, where Dr. Robert Naviaux, an associate of Dr. Richard Haas, who had been so helpful to the Campbells, finally diagnosed David's condition nine days before he died. He had Leigh's Syndrome, one of 40 mitochondrial diseases, which affects the areas of the brain controlling breathing, eyesight, appetite, blood pressure, and the ability to walk. It was too late for an experimental treatment, and there is no known cure for the disease. "He just didn't fit any of the symptoms until the very end, and that's why it was so difficult to diagnose," Dan says. David was the first diagnosed mitochondrial patient at Children's Hospital San Diego.

David died July 1, 2001, and over 300 people came to his funeral. "The outpouring of love for David was just phenomenal," says Cathy. "We asked that donations be made in David's name to the UCSD Mitochondrial and Metabolic Disease Center, and \$10,000 was given. And then our neighbors and friends organized a fundraiser in his name and another \$12,000 was raised. That money funded the services of a part-time research position at the UCSD center who helped develop three new tests for the disease." Danny missed his brother so much that he died his hair red in his honor, says Cathy.

"When the doctors at UCSD called to say the money raised was the second largest donation ever made to mitochondrial research, we knew we needed to create a foundation in David's name to raise funds for research and awareness of the disease," says Dan. "How could we not do it?" asks Cathy. "To know that another little three-year-old boy may have a chance because of our efforts is reason enough."

Their research told them it would cost anywhere between \$20,000 to \$50,000 to set up a foundation, so they began looking into local community foundations on the advice of a friend. "We really liked OCCF," says Cathy. "From the initial contact, they were supportive of our cause and our needs. And, of the three organizations that we called, Shelley Hoss was the only executive director to call back. She immediately got involved."

Three charity fundraisers are planned this fall for the David P. Campbell Foundation for Pediatric Mitochondrial Disease Research. The second annual Wish Upon a Cure fundraiser on September 29 is for the whole family and features salon haircuts, personal services, gift baskets, boutique shopping, and car washes. The Wish Upon a Cure Benefit Concert on October 26 will show-

case gifted singer/songwriter and Irvine resident Jana Alayra, whose sister suffers with a mitochondrial disease, and the Wish Upon a Cure Benefit Luncheon and Birthday Party on November 15 will honor David's birthday with a visit from the UCSD research team. Call (949) 462-0307 for further information.

All three couples found OCCF to be the answer to their giving needs. With so many good causes to support, the strength of OCCF seems to be its ability to research and determine people's specific needs. "Often, people look at where their money is going and see no rhyme or reason," says Hoss. "Nobody asks, 'What is it you really want to accomplish?' But we do. We find out what is in their hearts."

Contact the Orange County Community Foundation for further information at (949) 553-4202. ■

The Community Foundation: Orange County's Philanthropic Matchmaker

The Orange County Community Foundation is an expert matchmaker for donors who want to ensure that their charitable gifts fulfill both philanthropic goals as well as tax and timing objectives. When an individual, couple or family opens a donor-advised fund, the Community Foundation:

1. Assesses the best way for the gift to be made. For example, endowed vs. non-endowed; donor-advised fund vs. supporting organization – depending on the donor's needs and desires.
2. Assesses the asset to fund the gift. Cash and appreciated securities are easy, but what about closely held stock? S-Corporation stock? Real estate? Partnership interests? The Community Foundation can receive and process all types of assets – and works with donors' professional advisors to ensure that gifts enjoy the best possible tax advantages.
3. Meets one-on-one with donor-advisors to understand their charitable goals and interest areas, helping donors make a difference and communicate values through their giving.
4. Introduces them to other donors, if desired, who share their charitable interests, and arranges educational forums on topics of donors' interest.
5. Conducts research and due diligence on charitable organizations, using the expertise accumulated over years of experience in the Orange County non-profit arena.
6. Accompanies donors on site visits and helps them get personally involved if they choose.
7. Reports to donors regularly on the activity in their fund, and presents new ideas and opportunities if they desire.
8. Helps to ensure that donors' legacies are fulfilled, by acting as a steward of bequests and other planned gifts.