



The
Durfee Foundation

2011–2023

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Durfee Foundation Timeline

1960

R. Stanton (Stan) Avery and Dorothy Durfee Avery found the Avery Foundation

1964

Dorothy Durfee Avery passes away

1965-1966

Stan and Dorothy's three children, Judy, Dennis, and Russell Avery, join the board

1977

Avery Foundation is renamed the Durfee Foundation in honor of Dorothy Durfee Avery

1979

Foundation's first Executive Director, Robbie Macfarlane, is hired

1980

New grantmaking guidelines created, including an emphasis on grants to individuals and to efforts unlikely to receive other support

1985

American/Chinese Adventure Capital program launched in honor of Stan Avery's connections to China; program runs for over 15 years

1986

The first wave of the third generation joins the board; Michael Newkirk and Carrie Avery become trustees

1989

Durfee's longest standing (and only national) program, Student Challenge Awards at Earthwatch, established

1992

Durfee Community Fund gives out first grants

1993

Carrie Avery elected board president

1994

Board adopts community representation on selection panels of grant programs

1995

Jonathan Newkirk joins the board (Russell and Dennis Avery had previously retired)

1996

- Robbie Macfarlane retires; Claire Peeps named Executive Director
- Board affirms its focus on grantmaking in the Los Angeles region, and on efforts that involve individuals and risk-taking

1997

- Sabbatical Awards program launched
- Master Musician Fellowship program launched
- Stan Avery passes away at age 90, just a few weeks after attending a board meeting

1998

Halina Avery joins the board

1999

- First ARC Awards given out
- Durfee Artist Awards launched
- Diana Newkirk (McKee) joins the board

2001

Gay and Lesbian Fund launched

2003

- Artist Awards program sunsets
- Claire takes three month Sabbatical

2006

- First cohort of six Stanton Fellows selected
- Durfee Community Fund replaced by the Springboard Fund

2008

Gay and Lesbian Fund sunsets

2009

- Judy Avery retires from the board after nearly 50 years of service; trustees are now all third-generation family members
- Master Musician Fellowship program sunsets

2010

- Foundation celebrates its 50th Anniversary
- Robin Kramer and Bill Watanabe welcomed as first Board Fellows

2011

New website launches

2012

Sandra Bryant & Cristina Regalado join board as Community Trustees for 2-year terms

2013

- Chris Avery joins board
- ARC (Artists Resource for Completion) program administration transferred to CCI (Center for Cultural Innovation)

2014

- Bruce Saito & Belen Vargas join board for 2-year terms, later extended for a 3rd year
- ARC program sunsets

2015

- BayTree makes \$5 million commitment over 5 years (\$1m/yr)
- Sara Avery joins board

2016

Bylaws amended to make community trustee term extendable to 3 years and cap board at 15 members, with minimum 51% family representation

2017

- Theo Avery joins board
- Paula Daniels & Vera de Vera join board as Community Trustees for 3-year terms
- Sara Avery steps down from board

2018

- Stella Chung and Mary Cruz join staff, bringing full-time staff to three for the first time in Foundation's history
- Office relocates to downtown Los Angeles
- Carrie takes a 3 month sabbatical

2019

- BayTree completes transfer of approx. \$21 million
- Durfee engages Angeles Investment Advisors for asset management

2020

- Nike Irvin & Leslie Ito join board for 3-year terms
- Sabbatical program paused due to COVID-19 pandemic
 - Wellness grants distributed to 60 organizations
- Carrie becomes Chair of Trust Based Philanthropy Project Advisory Board

2021

- Earthwatch/Student Challenge Awards Program sunsets after 32 years
- Sabbatical program makes a record 12 awards
- Durfee awards \$1.7 million in Flow Funds for COVID-19 relief
- Pilot for Lark Awards initiated
- Chris Avery and Jonathan Newkirk step down from board
- Board votes to add a third community trustee to board

2022

- Robert Sainz joins board for 3-year term
- Doug Newkirk starts one-year prospective family trustee process
 - Lark Awards launches
- Mary Cruz departs; Yvonne Macias joins staff

2023

- Doug Newkirk joins board as first 4th generation trustee
- Elmer Vivas Portillo joins staff, bringing Durfee staffing to four full-time
- Carrie Avery steps down from board/staff role at year-end
- Claire Peeps makes one-year announcement of stepping down in 2024

Introduction



In 2011 the Durfee Foundation published a monograph commemorating its 50th anniversary. It probably would have waited until its 75th anniversary to update it had 2023 not been such a milestone year for the foundation. In July Carrie Avery, the board president and staff member, and Claire Peeps, the executive director, announced

they would be stepping down from their respective roles within the coming year. They had been an inseparable team for almost 30 years and had enjoyed an impressive run. Now, they agreed, it was right time for the next generation to step up. It also seemed the right moment to document the foundation’s evolution from 2011–2023.

The leadership transition and succession represented a major turning point for the foundation, but not the only significant change. The past 12 years had been an unusually eventful time for Durfee. It moved its office to downtown L.A., and nearly doubled its assets, allowing it to increase its grants budget and staff. True to its tinkering culture, it continuously tweaked and refined its grant programs, discontinued some longtime programs and created a new one. The board demographics also changed; a third community trustee was added and the first fourth-generation family trustee joined the board. And then in 2020, the Covid pandemic roiled the nonprofit community, testing the Durfee board’s and staff’s ability to respond quickly to an unprecedented emergency.



*Stan and
Dorothy
Avery*

Throughout its history, the Durfee Foundation has been guided by the enduring values of its founders, R. Stanton Avery and Dorothy Durfee Avery. While the programs and policies will alter over time in response to changing circumstances, Durfee’s values—the foundation’s North Star—are immutable. The trustees are firmly committed to Durfee’s fundamental mission of taking care of the individuals doing the hard work of bringing about meaningful change in Los Angeles County.

Durfee’s reputation has evolved as a foundation with a brain and a heart, with its work defined by collaboration, innovation and mutual respect. Its relational approach to philanthropy has become a model for foundation grantmaking. It is gratifying that a growing number of funders are recognizing the advantages of having more open, honest and equitable relationships with grantees. Durfee’s own experience with this approach has resulted in more effective programs and a more enjoyable grant-making experience for the staff and grant partners.

The Durfee Foundation is proud to share this record of accomplishments over the 12 years from 2011-2023 and its optimism about the foundation’s next chapter under the leadership of its new chair, Theo Avery.



Durfee Board Retreat, 2023

Changes on the Durfee Board

Community Trustees Become Full Board Members

The Durfee Foundation had an all-family board since its inception, and the third generation continued the tradition. The trustees enjoyed the warmth and camaraderie of a close family board. Adding non-family trustees was not on their radar until Carrie brought it up. She had been attending conferences organized by the National Center for Family Philanthropy where she met family trustees who had invited non-family trustees onto their boards. Their experiences were overwhelmingly positive. That was confirmed by interviews Carrie conducted herself. She had long favored increasing the diversity of the board. Bringing on people of different races, perspectives and experiences in the L.A. nonprofit community would only strengthen the board and the foundation. The Durfee board was known for its openness to new ideas; Carrie was surprised by their hesitancy when she suggested adding non-family members.



Robin Kramer

To ease the board's concerns, Claire recommended inviting Robin Kramer and Bill Watanabe, two people well known to the foundation, to join as board fellows. Since the trustees had experience in managing fellowships, this seemed like a comfortable starting model for the board. The new board fellows would attend all board meetings and be privy to all board information, but they would not have the right to vote. Carrie and Claire explained that this would be an experiment and that Carrie would conduct exit interviews at the end of their two-year terms. Bill told Carrie that the experiment was promising, but not having a vote made him feel like a second-class citizen on the board.



Bill Watanabe

“When I told the board how Bill felt,” said Carrie, “they quickly affirmed that the board fellows should be converted to community trustees with full membership and the right to vote. Claire’s assumption that the board was reluctant to step into the unknown had been correct, but once the trustees saw the caliber of the people we had invited to join and how much they added to our discussions there was no looking back.”

After the next two community trustees completed their terms, Carrie conducted one-on-one conversations with each of them. They told her that the first year had been a steep learning period and that the two-year term went by too fast for them to get fully up to speed. The board listened and voted to add an optional third year to the community trustees’ terms. So far, all have chosen to take it. The board agreed that capping the trustee terms at three years would enable them to rotate in new trustees on a regular basis, which has proved to be valuable.

Carrie’s departure at the end of 2023 and Claire’s in mid-2024 presented a dilemma for the incoming 2024 board. Two community trustees were coming to the end of their three-year terms. In normal times, the board would have recruited two new members to replace them. But Durfee was in the midst of its first major transition in leadership in three decades. Theo Avery would be beginning his tenure as chair in January and the search for Claire’s successor would be underway.

“We didn’t want to bring on two new community trustees who would need orientation and tending right at the start of the transition,” said Carrie. “As president, I regularly checked in with new trustees in their first year to see how they were doing. I didn’t want to burden Theo with that during his first year while simultaneously leading the search for the new executive director. I also wanted to have the board prepared to move full-steam ahead, ready and able to support Theo and Claire.”



Sandra Bryant

Carrie proposed and the board approved filling the two vacancies with two former community trustees: Sandra Bryant, a Sabbatical Fellow in 1999, and Paula Daniels, a Stanton Fellow in 2012. Both agreed to return to the board in January 2024.



Paula Daniels

The Durfee board is fortunate to have an exceptional pool of Sabbatical and Stanton Fellows Programs and other community partners from which to draw community trustees. Beside the advantage of being known to the board, their vast experience and knowledge of Los Angeles's nonprofit community broaden and enrich the board's discussions.

“This is a very friendly, open-hearted group and refreshingly honest,” said Paula. “I felt honored to be invited back again and to contribute whatever I could. I’ve served on boards where the workload felt like a burden. Durfee requires just the right amount to keep trustees engaged and informed, so it’s easy to manage and work full-time.”

Theo and Paula both joined the board for the first time in 2017. She got to know him well during the three years they served together. “Theo is wonderful,” she said. “He’s going to be an absolutely terrific leader.”

First All-Family Board Retreat



The Durfee board holds a retreat every other year to take a long view of its mission and goals, but it has always been for trustees only. At the 2012 board retreat, the trustees turned their attention to the expanding Avery clan. The oldest of the Next Gen—teens and young adults—are just the right ages to begin introducing them to the foundation. The board suggested inviting the Next Gen to attend the board retreat in 2014 to acquaint them with the foundation.

*All-Family
Board Retreat*

That the trustees had to be more deliberate in their outreach to the younger generation was confirmed by Chris and Sara Avery. They had participated in a yearlong prospective trustee process in 2013 to learn about the foundation’s programs and how the board operates. Afterwards, they told Carrie what a wonderful learning experience it was. Their only complaint: Why hadn’t they known about the foundation earlier?

**“That got us thinking,” said Carrie.
“We needed to do more to show the whole family,
not just those already on board, what the Durfee
Foundation was all about.”**

In July of 2014 the Durfee Foundation held its first All-Family Board Retreat. Seven Next Gen (both 3-G and 4-G) between the ages of 17 and 26 attended the retreat. The board had a big docket to get through, so Carrie and Claire worked with Robin Kramer, Durfee’s longtime facilitator, to refine the goals of the retreat. They planned a separate schedule for the Next Gen that would balance age-appropriate sessions on Durfee’s mission, history and values with plenty of free time for them to have fun.

On the first evening, the whole family gathered after dinner for a “fireside chat” with Judy and Russell Avery, the daughter and son of the founders who had served on the board for decades. They shared memories of their parents and the early days of the foundation that piqued the Next Gen’s interest and curiosity about the founders.

The next afternoon the Next Gen met with Esther Kang, a Durfee staff member, to talk about Durfee’s programs and hear about the Next Gen’s own community interests. Esther started off by asking: Apart from money, what have you inherited and what do you want to do about it? Do you volunteer and, if so, where and what have you learned? Do you have questions about the foundation? They wrote their answers on sticky notes and stuck them on poster boards.

On Sunday morning the whole family gathered after breakfast to talk about the sticky notes the Next Gen had posted. The discussion gave the board a good sense of what was on the minds of the younger generation and a chance to answer their questions about the foundation and why philanthropy is important.

*Rick Nahmias,
Food Forward*



What better way to make real what the Next Gen had just learned about Durfee’s programs than to meet a grant partner? Carrie and Claire knew exactly whom to call: Rick Nahmias. His organization Food Forward had received a Springboard award in 2011. Walking around L.A. he had noticed how much fruit from trees in backyards and public

places was rotting on the ground. Why not harvest it from the trees and give it to food pantries and homeless shelters? From that simple idea, a start-up organization was born. Over the past three years, Food Forward has recovered and delivered more than four million pounds of food. It has become a juggernaut food recovery organization, with over 50 staff and a robust operation that now includes food recovery from Farmer's Markets and wholesalers. Rick became the first Springboard grantee to receive a Durfee sabbatical in 2023.

Rick arranged to have the family pick oranges for Food Forward. Handing them baskets and basket pickers, he put them to work. The whole Avery clan from age two to 76 pitched in, filling 30 cartons with oranges that would be delivered to a food pantry that day. Afterwards, Rick talked to the group about how the Springboard grant had kickstarted his organization. He had never run a nonprofit organization and didn't know where to begin. Durfee's financial support was critical, but what really put Food Forward on the path to success was the coaching he received from Steve Le Pore, a Sabbatical and Stanton Fellow, who had mentored Rick on how to grow his organization.

By all accounts, the first All-Family Board Retreat was a huge success. Building on its momentum, Durfee launched a bimonthly e-mail newsletter with updates about the foundation that goes out to every member of the Durfee family.

*Board Retreat,
2012*



The All-Family Retreat was such a hit that the board wanted to include the Next Gen in the 2018 retreat. To appeal to their concern about the environment, Carrie and Claire recommended a visit to RiverLA with Stanton Fellow Omar Brownson and LA Compost, a Springboard grantee whose founder Michael Martinez was mentored by Omar. Maintaining the Next Gen's enthusiasm was more unpredictable than the trustees expected. Not one accepted the invitation to the retreat. The board accepted the reality: most were not at a place in their lives when Durfee was appealing or accessible to them, and they left it at that. The board agreed that the Next Gen would be more likely to engage with Durfee when they were in their later twenties and beginning their independent lives. In 2023, there were 15 members of G-4, ranging in age from 1 to 34. Figuring out how to share the foundation's work with Next Gen remains an ongoing project.

First Fourth-Generation Member Joins the Board

The Durfee Foundation is committed to maintaining a strong family presence on the board, but keeping a steady stream of family members in the pipeline doesn't just happen; it requires cultivating young family members over time. Carrie had checked in regularly with third and fourth generation family members in their twenties. By keeping them informed of the exciting work the foundation was doing, she hoped to spark their interest in serving on the board one day.

The current third-generation board members are now middle-aged; some like Carrie, her brother Mike and their cousin Halina have served for a long time. Theo is replacing Carrie as chair, but what if Mike or Halina were to step down. Who would replace them?

Douglas Newkirk



Carrie had her eye on her nephew Douglas Newkirk, her brother, Mike's son. Douglas is the oldest of the fourth generation and one of the last to have met his great grandfather, Stan Avery, who lived near where Doug grew up in Pasadena.

“I was pretty young when he died,” said Douglas. “I learned more about him when I was growing up because he had deep roots in Pasadena. He donated money to build a children’s wing of the Pasadena Public Library. It was so cool to see his name on the entrance to the library. And there’s Avery House at Cal Tech, so I knew that he had contributed a lot to Pasadena.”

Doug was aware of the Durfee Foundation from a young age. His father Mike, a physicist, had started the Earthwatch/Student Challenge Program, that sent gifted high school students to work on science projects for two weeks during the summer. Doug remembers looking over his father’s shoulder as he read through a stack of applications in the living room and asking about the projects, but he had a hazy idea about how the foundation operated. It wasn’t until he attended the All-Family Board Retreat in 2014 that he learned about Durfee’s history and other programs. “The discussions demystified the foundation and made it a lot more real to me. I came away from the retreat feeling a lot of pride in being connected to it.”

The time wasn’t right for Douglas to think about serving on the board in 2014. He was 25 and busy teaching elementary school in the San Francisco area. When Carrie approached him in 2020 about serving on the board, he was more open to the idea. He was still busy teaching, so what changed between then and now? “What changed was Carrie asking me directly to be a prospective trustee,” said Douglas. “She was about the same age I am now when she joined the board, and she laid out her position. How could I say no? It’s such an honor to be the first of the fourth generation to serve.”

In 2022 Douglas started attending board meetings as a prospective trustee. At the end of the year, trustees voted to invite him to join the board. “I didn’t know how anything worked when I started,” said Douglas. “The prospective year was a time for me to observe and absorb without feeling any pressure. Everyone was super patient and talked to me one-on-one outside of the meetings about how things were going and how they could help me.”

Carrie was always on the lookout for opportunities for new members to educate themselves apart from the board. She messaged Douglas asking if he wanted to sign up for an online seminar about the legal responsibilities of a trustee. He did. “The seminar was for people just like me, brand new trustees, and covered all the basics. I learned a lot, and I’m still learning.”

Carrie also invited Doug to go with her to a National Center of Family Philanthropy conference where he got another view of the Durfee Foundation. “My family is so humble,” he said. “They never boast about having a foundation. Walking around the conference with Carrie was an eye-opener for me because I saw how highly regarded Durfee was by other philanthropists.”

Doug attended his first board meeting as a full trustee in March 2023. It seemed fitting that the first fourth-generation family member would start his tenure on the eve of a major generational transition in leadership.

“My timing was perfect because I served my prospective year when Carrie was still president and got to see how she did things,” said Douglas.

“Now I’m excited about supporting Theo and championing the next phase of the board. I also think I can bring some new perspectives from my background in education. It’s such a wild feeling for me to be sitting on the board and having a chance to contribute to the foundation.”



A View of Downtown Los Angeles

Administrative Changes

Durfee Moves Office Downtown



Durfee had an office in Santa Monica for nearly 20 years to be accessible to the Los Angeles airport for those who needed to fly in for meetings. Judy Avery also had a residence there where family members could stay. Moving the foundation's office had been on Carrie's and Claire's minds for a while. They were concerned that it sent the wrong message for Durfee to have an office on the farthest-most western edge of Los Angeles when it was funding programs all across Los Angeles County. It was also inconvenient for staff who couldn't afford to live nearby and who had long commutes to the west side of town. When the lease came up in 2018, Claire found a space in downtown Los Angeles that was centrally located for the whole county, with many nonprofit and philanthropic partners nearby.

Durfee's Assets Surge

BayTree was a private foundation established by Judy Avery. She had begun making gifts to Durfee in 2013 to underwrite the expenses of operating the Earthwatch and Sabbatical programs. After a few years, she increased the donations to \$1 million annually. Then, in 2018, she decided to dissolve BayTree and distribute \$21 million of its remaining assets to the Durfee Foundation. The gift boosted the foundation's assets to \$60 million. "It changed some of our operations," said Claire, "but it didn't affect our grant making very much because Judy's prior annual gifts had already allowed us to grow the programs to a comparable level, of approximately \$2.8 million."

The large influx of money did require a change in how Durfee invested its assets, however. The board had been investing in a collection of mutual funds on its own. With a substantial increase in assets, the foundation needed a more sophisticated investment strategy. For the first time in its 58 years, Durfee hired a professional investment management firm, Angeles Investment Advisors.

Durfee Hires Full-time Administrative Staff

Carrie and Claire were such a strong team and did so much of the work themselves that they had managed to run the foundation with only two part-time administrative aides. Before coming to Durfee, Claire had worked in nonprofit organizations that were perpetually strapped financially. She operated with a nonprofit scarcity mindset of keeping administrative costs down to spend as much as possible on programs and services. In recent years, the administrative workload had outgrown its small staff, and Claire was feeling overwhelmed. It wasn't the increase in assets that finally convinced Claire to hire more staff, but the unexpected confluence of events that occurred just as Carrie was leaving on her Sabbatical in 2018.

Durfee's two part-time administrative staff had decided to move on, and Claire hired a new one to work with her while Carrie was away. Forty-five minutes before driving Carrie to the airport, Claire learned that the new hire had made a last minute decision to take a job out of state. The timing couldn't have been worse. Durfee had just hired the new investment management firm, was in the midst of negotiating a new office lease, working with contractors to design and build out the new office, and in the process of shutting down the foundation's storage space and digitizing the foundation's entire history. "I was the last person standing," said Claire, "and it just about broke me."

Claire turned to the board for help. They quickly approved funds for her to hire two full-time staff members. That was a big shift for Durfee; it had previously had only part-time office employees. There was no way that Claire could manage the office and have time to review resumes and interview candidates for two positions on her own. Claire put out another call for help, and two board members, Paula Daniels and Halina Avery, responded.

Claire had talked with Paula and Halina about the high turnover of part-time staff which Claire believed was related to the nature of the jobs. Young people attracted to working in a foundation expected it to be an interesting place to work, but they got bored doing administrative tasks and left. Claire proposed restructuring the jobs so that they would include both administrative and program responsibilities. Besides making the jobs more engaging, it would give the foundation needed flexibility.

Each position would have the same training, allowing one staff person to cover for the other if one were out sick, took vacation, or decided to move on.

Carrie, of course, knew nothing of what had transpired until she returned from her three-month Sabbatical.

*Stella Chung
and Mary Cruz*



“I felt terrible that Claire was left in such dire straits while I was having a great time in Africa,” said Carrie. “Luckily, Paula and Halina pitched in and the happy outcome was Durfee’s hiring two strong staff members, Stella Chung and Mary Cruz.”

Just as Claire predicted, adding the programs to the administrative tasks made the new staff members feel like a part of the team. Stella was assigned responsibilities for the Sabbatical Fellows and Mary for the Stanton Fellows. Smart and capable, they quickly immersed themselves in the work.

After four years as a program manager, Mary enrolled in law school as she had planned to do, and Stella was promoted to director of programs and operations. Claire has since added two more full-time staff members: Yvonne Macias as programs & operations associate, and a program manager.



Yvonne Macias

In retrospect, Claire regrets not having hired full-time staff when Durfee started receiving Bay Tree money. The part-time administrative positions were dead-end jobs. By contrast, the full-time staff positions provided real educational experiences; beside managing the programs, young staff members were developing relationships with nonprofit leaders in Los Angeles. “Once they tap into the magic of doing this work,” said Claire, “they get invested in the program. We missed opportunities to set staff on paths of advancement sooner.”

Even with the addition of three full-time staff members, Claire was still busy, but with one big difference: she had more time to think about bigger issues. “When I look back over the history of Durfee’s programs, the work load has always been high,” she said. “We used to turn on a dime, and do what had to be done without much administrative support. Now with the staff doing such a terrific job, I have time to think more deeply and productively about our programs as well as issues in the nonprofit sector I want to see change, like paying livable wages to the staff of our nonprofit partners. I have a long to-do list of things that still need to be done.”



Stanton fellows at Prevention Institute with Manal Aboelata

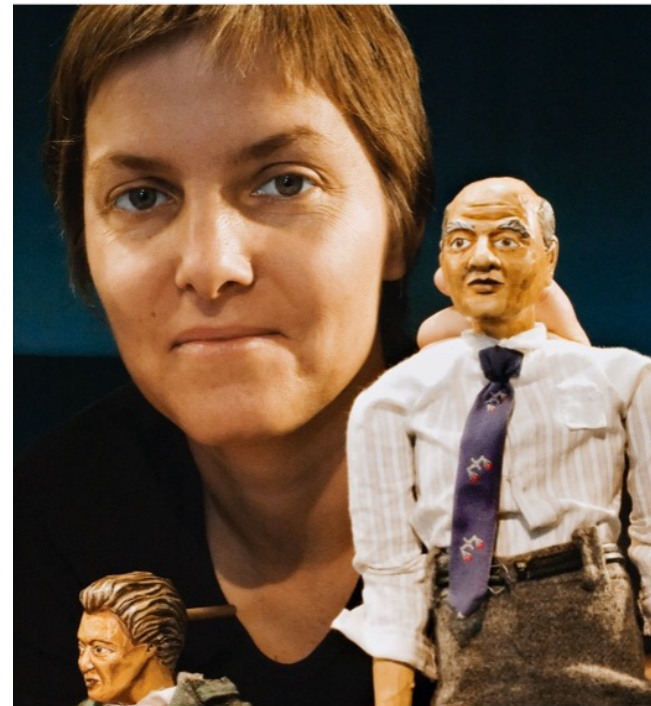
Grantmaking

Durfee Closes Two Long-running Programs

Durfee is committed to staying with its programs for as long as they are needed and are manageable for Durfee staff. Over the years, it has terminated programs only when circumstances changed, such as when other funders have stepped in with larger dollars or when the workload of managing the program outgrows Durfee's capacity.

Durfee created the **Artists' Resource for Completion (ARC)** program in 2000. It awarded small grants to Los Angeles artists to take advantage of a specific opportunity that arose and might boost their careers. Carrie and Claire were aware that both young and more established artists struggled financially. Beside recognizing their work, they hoped the ARC grants would create a climate of optimism in the L.A. arts community. Durfee reached out to other funders to step in and support the program but none stepped forward. Finally, in 2013, Durfee transferred the administration of the program to the Center for Cultural Innovation, a Los Angeles organization that promotes networking and financial independence for individuals in the arts.

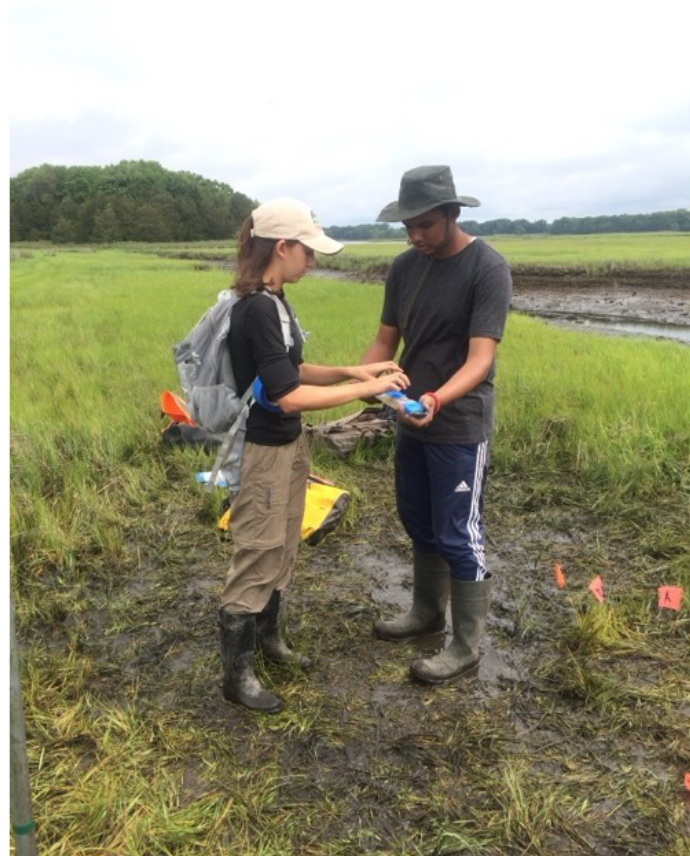
The ARC program concluded in June 2014 with a final round of grants. In total, the program had helped advance the careers of 600 artists working in a range of disciplines and had a significant impact on the L.A. arts community.



*ARC Recipient
Susan Simpson*

“It’s really hard to get funders to join in or take over another foundation’s work,” said Claire. “They perceived it as ours, not theirs. The lesson we learned was that if you want a program to be funded by a collective, it has to be done at the outset.”

In 2021 Durfee ended its longest running program, **Ignite**, started by Mike Newkirk at a time when family trustees were encouraged to initiate their own programs. Mike, a physicist, wanted to give high school students from around the country the experience of working on a science research project in the field. The program was ambitious and hugely popular, but complicated to administer; Durfee had to work with an out-of-state partner, Earthwatch, to line up projects. Over time, the Durfee's goals to expose students to many scientific disciplines diverged from Earthwatch's focus on conservation science. Meanwhile other programs had sprouted up around the country offering summer science research projects for high school students, making Durfee's program less urgent or unique.



Ignite student participants

One of Durfee's goals in funding a program long-term is to develop ongoing relationships with the grantees. It was difficult to build an Ignite alumni cohort because the high school student went off to college and were difficult to track. Durfee had other concerns. The program was also expensive to run and took up a large part of Durfee's grantmaking budget. The foundation had hoped that Earthwatch would be able to generate other funds to share in the costs of Ignite in Los Angeles or to replicate the program across the country, but both proved unsuccessful. But most importantly, and happily, a national focus on STEM education had prompted several other substantial programs to be developed nationwide, making Ignite less urgently needed. For all of these reasons, Durfee terminated the program after an impressive 32-year run. Durfee acknowledged that the world had changed around it, and celebrated the role the foundation had played in helping Earthwatch and other entities develop STEM programs for youth. The foundation made a parting general operating gift to Earthwatch to help them sustain their work.

Durfee Responds to Pandemic Crisis

By March 2020, Covid-19 cases and deaths were spiking at an alarming rate. California was the first state to order a lockdown. In Los Angeles, as across the state, schools closed, business districts became ghost towns, and tens of thousands of Californians lost their jobs. Among the most vulnerable—many low-wage workers and the undocumented—were clients of Durfee’s grant partners. The lockdown caused chaos and confusion in the nonprofit community. Like all foundations, Durfee had little time to figure out how best to respond to the emergency situation.

Durfee maintains a calendar that maps out grant programs, deadlines, events and meetings three years in advance. Every two years it selects a new class of Stanton Fellows who travel the world and meet quarterly with their cohorts. Durfee also brings together the Sabbatical alums for lunches twice a year and a retreat biannually.

“All of this planning went out the window,” said Carrie. “I was supposed to be in L.A. for a meeting with CIELO, an organization that supports the indigenous immigrant community in L.A. Meeting on Zoom, I expressed my shock and distress about the pandemic. They shrugged. They wanted to talk only about what their community needed now.”

Carrie and Claire contacted the Durfee network of Los Angeles nonprofit leaders to find out what immediate problems they were confronting. Among the most urgent were how to pivot to online work, keep frontline workers safe and change their programs quickly to keep serving their communities. The leaders were under tremendous stress and wanted to hear how their colleagues were responding to the crisis. Could Durfee set up facilitated support groups? Durfee staff put out calls for leaders to join voluntary support groups and many responded. Durfee engaged two long-tenured and beloved fellows to facilitate zoom groups. Four groups of eight met bi-weekly over the course of the next several months. The facilitators sent the participants care packages paid for by Durfee, which

they opened together online - snacks, candles, mugs, poetry. The fellows reported that the peer gatherings and conversations were a source of strategic focus, solace and renewal during a stressful time.

Worried about the well-being of their grant partners, Durfee staff brainstormed what more Durfee could do to help them. They had extra cash on hand from canceled events. Why not use it now? With the board's approval, Durfee rushed to send out \$5,000 unsolicited gifts to about 60 of the most engaged organizations in its network to support their staffs, waiving applications and final reports. "The gratitude for these small gifts recognizing the humanity of nonprofit staff members was overwhelming," said Carrie.

Not knowing when the lockdown would end, Durfee kept planning and postponing events scheduled for the Stanton Fellows. Finally, they canceled them. Stanton is a two-year fellowship. Because it was impossible for Fellows to travel and work on their inquiries, Durfee added \$10,000 to the fellowship stipend to be used for personal well-being. The Fellows were moved and energized by the gift, and shared ideas with one another on how to spend it - improve their home work spaces, take brief get aways, consult with nutritionists and more. The Sabbatical and Springboard programs were also put on hold, with the lockdown still in place. This left a substantial amount of cash available for Durfee to distribute in 2021. The Durfee team brainstormed how to allocate grant dollars most effectively during this time. Claire shared a **"flow funds"** philanthropic model she had learned about, allowing grants to be made to organizations for pass-through redistribution directly to community members. She made calls to several deeply trusted, small Durfee nonprofit partners who were on the frontlines of Covid relief in neighborhoods across Los Angeles County who were not yet receiving substantial government assistance but whose staff were both overstretched and directly exposed to Covid. They needed help.

With Durfee board approval, the foundation swiftly made grants of close to \$200,000 to each of nine community-based organizations, totaling \$1.7 million. No application or final report was required. Instead, Durfee asked the organizations to send a short closing letter with a photo and a story of someone served. The stories were moving. One organization created a drive-through haunted house for Halloween and subsequently a drive-through visit with Santa. There was a line of cars a mile long waiting for diapers, food, home supplies, bicycles, and toys. Another paid medical bills and rent for residents who had lost jobs or family members to Covid.



*Barrio Action
Flow Fund
recipients*

Still another made multilingual flyers about Covid for non-English speaking neighbors. Many organizations' offices became vaccination sites for the administration of shots to thousands of low-income residents.

Still grappling with the shock of the pandemic, the country was thrust into more turmoil in May when George Floyd was murdered by police in Minneapolis. Durfee staff contacted Black leaders in Durfee's network to find out how they could support them. Shaken by recent events, the group asked for a facilitator to meet with their colleagues to process their feelings about the crisis. After several meetings with the facilitator, they invited Carrie and Claire to join them to review a broad inventory of Durfee DEI practices related to its board, staff, grantmaking and investments. "We asked how Durfee could be a better partner," said Carrie. "They encouraged us to promote our practices of transparency and respect in the broader philanthropic community and specifically endorsed the Trust-Based Philanthropy model, an initiative addressing power imbalances between grantors and grantees. We were gratified to hear that they considered Durfee to be a valued partner to the Black community."

The board also discussed the impact of the racial reckoning at Durfee. In the summer of 2021, during a brief lull in Covid, the Durfee board was able to assemble for an in-person retreat. Recognizing that the board represented a range of experience on the topic of race, Carrie and Claire invited two Durfee community trustees, Nike Irvin and Paula Daniels, to lead the board discussion. They each chose a poem as a starting point for board discussion; Nike read "In This Place (An American Lyric)" by Amanda Gorman, and Paula read "Let America be America Again"

by Langston Hughes, and conversation ensued. Each board member was also invited to recommend a book to the group, which Durfee purchased. At the conclusion of the retreat, board members had a lively exchange about the books. It was an important step in what continues to be an urgent discussion.

The Durfee staff are careful planners. For the first time in their long history, they had to scrap their plans and improvise on the spot how to support Durfee's community during an unprecedented crisis. Like all foundations, they were in uncharted territory, but Durfee staff had an advantage: they had strong relationships with their grant partners. Their practice had always been to consult them before taking action, and that's what they did during the Covid lockdown. The foundation's ability to act quickly and boldly had never been tested as it had during the lockdown. It was a profound learning experience, which they hope will serve the foundation well in the future.

Two Junior Staff Members Create the Lark Program

The new staff positions that combined administrative and program responsibilities were as stimulating as Claire had hoped; the new staff members were thoroughly engaged in their work. Creating a work environment that promoted independent thinking and innovation was rooted in Durfee's values. Stan Avery, Durfee's founder, attributed his business success to encouraging employees to take the initiative in presenting ideas to fill a need or improve existing practices. Stella Chung and Mary Cruz did just that.

In 2020, Stella and Mary were promoted from program associates to program managers. Mary was working on the Stanton Program and Stella on Sabbatical. One of Stella's responsibilities was recruiting applicants for the Sabbatical program. To be eligible for the grant, the candidate's organization had to have a minimum of five staff people and be stable enough financially to get by for three months without its leader.

Mary and Stella were frustrated. Some highly regarded organizations whose names had been submitted to Durfee didn't fit the Sabbatical program's guidelines. Mary had been making a list of small organizations doing important work. She knew many of their staff members; they were working hard at low-paying jobs and were exhausted. Didn't their well-being matter, too? She and Stella made their case to Carrie and Claire. "You never know how these conversations will go over," said Stella, "but Carrie and Claire were receptive to our idea. They acknowledged that we had identified a gap in Durfee's outreach. They told us to think about what the need was and how we proposed filling it and to come back to them with a proposal."

Stella and Mary consulted with several Durfee Fellows. They also interviewed friends who were leaving nonprofit jobs because they were burned out.

“All of this was happening in the context of the pandemic and the toll it was taking on staff,” said Stella. “We learned a lot from the interviews and saw an opening to create a new grant program centered on care and renewal that’s right for small organizations.”

Stella and Mary presented their proposal to Claire and Carrie and later to the board at the July 2021 meeting, making Durfee history as the first non-executive staff members to offer a new program idea to the board.

Their proposal was approved as a pilot program, a common Durfee practice. Before embarking on a new program, Durfee often turns to focus groups to get feedback from the nonprofit community. They chose three former Springboard partners that had been small, grassroots organizations at the time they had applied for the grant. "We wanted to hear what they thought of the idea and what the parameters should be," said Stella. "At first we considered earmarking some of the money for the executive directors' use, but the focus group discouraged it; having one rule for all organizations wasn't advisable because their cultures differ too much. They recommended letting each grant partner decide how to use the lump sum for the well-being of the staff." The three pilot organizations received \$30,000 grants and provided feedback to Durfee about what worked and what needed improvement or clarification.



*Lark Galloway-Gilliam,
Community Health
Councils*

After presenting the positive feedback they received from the pilot test, Mary and Stella asked the board to approve the new Durfee program. The board voted to make it a full-fledged open application program. Stella and Mary were ecstatic. The program was named the Lark Awards after the late Lark Galloway-Gilliam, founder and director of Community Health Councils, who had dedicated her career to improving health and environmental equity in South Los Angeles and a 2004 Durfee Sabbatical recipient. In 2022, Durfee awarded the first \$30,000 Lark grants to 15 small organizations for the collective well-being and care of staff.

Stella agrees that it was a pretty heady experience having a program she and Mary conceived become a reality. “I don’t know of any other foundation or workplace that would give young staff members a chance to do something like this,” she said. “It showed the trust that Claire and the board had in us. Durfee values learning from what we hear from the field and acting on it, and that’s what Mary and I did.”

Durfee Alums Mentor Springboard Grantees

Durfee started The Springboard Fund in 2006. Since then it has awarded grants to 36 emerging organizations and their leaders who are implementing creative and novel strategies to address challenges in Los Angeles County. In addition to receiving a grant of \$90,000 divided over two years, recipients are matched with a mentor from the pool of Durfee Fellows who provides 50 hours of mentoring each year. A small grant is a welcome show of confidence in a fledging organization, but what determines its success is timely guidance from knowledgeable and experienced mentors. The Durfee fellows who have founded organizations are highly qualified to fill those roles. Building relationships is integral to all of Durfee's programs, and the 100 hours of mentoring allotted in the Springboard grant gives the mentor and grant partner a generous amount of time to develop a close bond.

Inclusive Action for the City



Rudy Espinoza,
Inclusive Action
for the City

Maria Cabildo, then executive director of East Los Angeles Community Corporation (ELACC), received a Sabbatical Fellowship in 2003 and a Stanton Fellowship in 2012. Her Stanton inquiry focused on elevating street vending as an economic development solution for low-income residents, especially those who didn't have a legal right to vote. In 2013, she hosted her cohort and Durfee staff at her office to update them on her inquiry and to introduce Rudy Espinoza, executive director of LURN (now renamed as Inclusive Action for the City), who partnered with ELACC in advocating for street vendors. Maria had known Rudy since he was a graduate student and recognized his exceptional leadership skills. "Most people focus on problems," said Maria. "Rudy can envision possibilities that others don't see and make them happen."

Maria's organization had been advocating for Los Angeles to change the city code and public health code so that vendors could get permits to work legally in the city. Rudy was working on the capital side—developing financial resources to ensure vendors had access to capital to sustain their businesses.

Carrie and Claire were impressed by Rudy's work and potential and suggested he apply for a Springboard grant. He received the grant in 2013, giving his organization the bump it needed to grow. Elwood Hopkins, a 2008 Durfee Stanton Fellow and the founder of Emerging Markets, signed on as Rudy's official mentor, at Rudy's invitation. His network continued to expand through Elwood, Maria and other colleagues in the Durfee family.

“It’s hard to get funders to invest in small organizations,” said Rudy. “Durfee’s faith in us really got the ball rolling. Durfee is respected in the philanthropic community, so when Carrie and Claire back an organization, other funders take a second look.”

Investing in promising small organizations is a risk Durfee is willing to take, knowing that not all will succeed. Inclusive Action for the City has surpassed its expectations. When it received the Springboard grant it had a tiny budget, and Rudy was its sole staff. Today it has a budget of \$1.6 million and a staff of 28. Over the past 10 years it has built three divisions: a team that advocates for policies supporting low-income communities and workers, like the street vendor campaign that succeeded in passing two state policies that created pathways for street vendors to get permits; a micro loan and business division that provides coaching to entrepreneurs, including street vendors. (So far, it has deployed \$2.5 million in loans and thousands of hours of coaching); and a third group just getting underway to develop resources to help individuals and business buy real estate.

“Maria was the broker who connected us to Durfee,” said Rudy, “and for that I’m forever grateful. Durfee has been an amazing partner. Beside investing in our loan fund, it has been a terrific advocate and ambassador for our work.”

Lost Angels



Steve LePore
and Aaron
Valencia

Aaron Valencia is a vintage auto restoration master craftsman, who has long operated a small business in Lancaster, a city in north LA County with the highest rate of youth living in foster care (84%) in California. Curious kids in the neighborhood started hanging around the garage where he was working. Could Aaron teach them how to paint cars? Aaron identified with those kids because he used to be one of them. He decided to open his garage to teens after school and on weekends to teach skills that would help them get good-paying jobs. After serving them a meal each day, he taught them how to paint cars. When they finished restoring a car, they auctioned it off to raise money to buy another old car.

Three years after founding Lost Angels in 2014, Aaron got a Springboard grant. He was just the kind of candidate the program was designed to help: he had a terrific idea and a shaky organization. The Springboard Fund gives recipients the names of five prospective mentors to interview and choose from, but Claire thought that Steve LePore might be a good match with Aaron. Steve has a long history with Durfee. In addition to receiving a Sabbatical Fellowship in 1997 and a Stanton Fellowship in 2010, he has been a Springboard mentor for the past 11 years, making him

what Claire calls a Durfee Triple Crown fellow. As the founder of three nonprofit organizations, he knows what it takes to get a promising young organization off the ground.

Steve's warm, welcoming manner usually puts inexperienced grant partners at ease, allowing Steve and the leader to dive right into figuring out what the organization needs. Aaron presented a challenge; he was a stranger to the nonprofit world, skeptical and guarded. Steve would have to take a different approach to win Aaron's trust. "I couldn't wait for him to call me," said Steve. "I had to take the initiative in reaching out to him in person. I drove out to Lancaster and spent several hours with him at a time. I just kept showing up until he was comfortable with me. That's my job. I have to earn the right to mentor."

When Steve started working with Aaron, Lost Angels was operating on a shoestring budget. It had no board to speak of, just a few friends, and one part-time staff, also a friend. "I have little to no education," said Aaron. "I didn't know anything about nonprofits. I just saw a void and wanted to fill it."

One of Steve's truisms is that new leaders don't know what they don't know, so how can they be expected to tell the mentor what they need? Before Steve could start working with Aaron, he had to be sure he understood his vision for Lost Angels and what he had been doing. Then they could begin tackling the organizational basics, like formalizing the board, hiring a bookkeeper, and making a budget.

Over the two years of the Springboard grant, Aaron and Steve built Lost Angels piece by piece into a stable organization. "Claire couldn't have been more right about Steve being the mentor for me," said Aaron. "He had founded organizations and knew all the mistakes. He wanted to keep us from going down the same rabbit holes. Steve's never judgmental and has zero negativity. He believed in me and gave me confidence that I could pull this off."

"I have to believe in the individuals and their projects to mentor them," said Steve. "Despite the hurdles, is there a possibility of a lift off? In Aaron's case—actually in all the cases of the Springboard grantees I've worked with—I fell in love with the person and the mission. If they stayed the course and did their part, there was no question that they'd lift off."

Since getting the Springboard grant, Lost Angels' budget has jumped from \$220,00 to \$2.5 million and the staff from one person to 12. Its programs have expanded from restoring cars to include classes in silk screening t-shirts, welding, electrical work and car mechanics. Lost Angels offers three semesters of classes a year and enrolls 40-45 students in each semester.

Lancaster is the home of the aerospace industry. Lockheed Martin and Northrup Grumman told Aaron they will hire every Lost Angels student who can pass their tests. Aaron adjusted the curriculum to make sure they could. Of the 120 annual graduates, 90 percent have gone straight to full-time careers in manufacturing and aerospace industries where they're earning good salaries.

Word of students' successes has spread around Lancaster. Today Lost Angels has a waiting list of more than 500 neighborhood youth aged 18-24 eager to start the program and companies eager to hire them. Aaron even caught the attention of CNN's Annual Heroes Awards. In 2017 he was one of the 10 finalists flown to New York and honored at the awards ceremony on television.

Steve has been at Aaron's side at every step of Lost Angels' progress, but Claire had a hand in Aaron's success, too. "Claire has been a great ally," said Aaron. "She's told a lot of funders about us. She's respected in this field so when she says she likes an organization, other funders take note. We've gotten calls from these foundations asking us to send them an LOI (letter of inquiry). Steve explained the process, and now we're ready to go when we're asked to send proposals."

Aaron has the new founder's obsession with his organization. "I live and breathe this work," said Aaron. "That's all I think about. How can we do better? How can we graduate more students? What other skills can we teach them? Steve recognized that look in my eyes and told me passion is good but if I didn't take care of myself, I could fail." Aaron listened and started taking off every other Monday to do activities he enjoys, like surfing and cycling. "Of all the things I learned from Steve," said Aaron, "self-care is the most important."

The Springboard grant put Lost Angels on the path to success, but his connection to Durfee didn't end there. "With Steve I didn't just get a mentor," said Aaron, "I got a friend. We've stayed in close touch since the Springboard grant ended. When we run into a problem, we hire him as a consultant. I didn't understand at the beginning that the Springboard grant would give us more than money and a mentor; it offered us fellowship. We're part of the Durfee network now, and the people couldn't be more helpful and positive."

Durfee Increases Grants for Sabbatical and Stanton Fellowships

Durfee started The Sabbatical Fellowship in 1997 to award grants to leaders of nonprofit organizations in Los Angeles to take three-month sabbaticals for needed relaxation, renewal and reflection. In 2022, Durfee increased the grant to \$75,000; \$60,000 goes to the awardees to use as they choose for travel or rest and \$15,000 to support the interim leaders and their staff while the leaders are away. Durfee had been awarding six Sabbatical Fellowships annually since the program began but because the program was put on hold during the 2020 Covid pandemic, it gave out a record 12 Sabbatical Fellowships in 2021. Over the past 26 years, Durfee has awarded 126 Sabbatical Fellowships.

The Stanton Fellowships are awarded to leaders to identify and think deeply about big questions facing Los Angeles. The program is open to senior leaders in the nonprofit sector and government, as well as to artists and organizers. It is a highly selective program. A maximum of six fellowships are awarded every two years. The six Fellows form a cohort that meets regularly over the two years of their fellowships, and many develop close friendships that continue long after their fellowships end. Durfee also increased the amount of the Stanton Fellowship from \$75,000 to \$110,000 over two years, with \$100,000 to support an inquiry through travel, convenings and other activities, and a \$10,000 well-being stipend for the fellow. Since launching the Stanton Fellowship program in 2006, Durfee has awarded 53 grants.

Lisa Watson Hired as Consultant to Sabbatical Fellows



Lisa
Watson

Durfee staff had been managing all aspects of the time-intensive Sabbatical Program since its inception. In 2014, they recognized the benefit of having a dedicated consultant to help prepare the Fellows for the sabbatical and the interim leaders for the executive director's absence. They immediately thought of Lisa Watson. She was a Stanton Fellow in 2008 and a Sabbatical Fellow in 2011. Besides having had firsthand experience with the programs, she is extremely knowledgeable about nonprofit organizations and an empathic listener. The timing was perfect. After 20 years as CEO of the Downtown Women's Center, Lisa had just started her own consulting business.

The excitement of receiving a three-month paid vacation can be tempered by the preparation required to take so much time off. The Fellows have to make their personal arrangements, and the interim leaders have to be ready to fill in for the executive director. That's why Lisa steps in soon after the awards are given.

"This is a once-in-a-lifetime opportunity," said Lisa. "I talk to Fellows about dreaming big and celebrating themselves. I encourage them to have fun imagining all of the things they could do and not to limit themselves. Of course, I also talk about practical matters, like their budget and which staff member or members will be the interim leaders."

Lisa also meets with the interim leaders to explain the terms of the Sabbatical. They cannot have any contact with the executive director for the full three-months—no calls, no texting, no e-mails. Lisa emphasizes that this period is a time for organizational growth as the interim leaders must form a team and learn how to delegate responsibilities. This applies to the board, too.

“The Sabbatical award is not only for the executive director, but for the whole organization. It’s really an honor because Durfee only gives the award to organizations that are strong enough to function well in the executive directors’ absence. I also caution them to allow more time to complete tasks that may look easy because the director did them quickly but will take them longer to do.”

Lisa meets with the Sabbatical Fellow cohort two or three times before they leave and then individually when they return. She also meets with the interim leaders twice before the executive directors leave and once each month during the Sabbatical. She assures the interim leaders that she will be on call if an emergency arises and to call her first to talk about how to handle it. She reminds them that they have the full support of the Durfee Foundation as well.

Stella Chung has been managing the Sabbatical program since 2018. She steps in when the Fellows still have questions about some aspect of the program or the foundation’s expectations for the sabbatical. “Lisa is their guide and confidante.” said Stella, “My role is to clarify anything they don’t understand.”

Lisa enjoys seeing the Fellows and the interim leaders through the full cycle of the grant. The Fellows return looking rested, energized and, often, with a different perspective on their work. There’s a change in the interim leaders, too, who learned to turn to one another to solve problems instead of immediately going to the executive director as they used to.

“It brings me such joy to work with the Sabbatical Fellows,” said Lisa. “They deserve to have this time because they give so much of themselves every single day at work. It’s amazing to see the changes in the interim leaders, too, many who now see the possibility that one day they could lead an organization. It’s just all so gratifying to have a part in this program.”



Martha
Dina
Arguello

Martha Dina Arguello received a Sabbatical Fellowship in 2021. She started working at Physicians for Social Responsibility Los Angeles in 1998 and was promoted to executive director in 2007. The organization advocates for policies and practices that improve public health, eliminate nuclear and environmental threats and address health disparities. An activist since she was a teenager, Martha has worked nonstop as an advocate, community organizer and coalition builder in the environmental justice movement. “I’ve defined myself by my activism,” she said, “and I’ve been lucky that my

jobs have been deeply aligned with my values, but I never learned how to take breaks.”

Taking care of her health was Martha’s first priority for her Sabbatical. She spent the first month at a wellness spa in San Diego that was more like boot camp than a vacation. “The program was structured and tough. I was up at 6 every morning and fell into bed exhausted at night. I had never been in my body in that way, and it reset me in profound ways. Two years later, I’m still keeping up my daily exercises.”

The second month of her Sabbatical was going to be all fun. Martha has been a Jane Austen fan since she discovered her novels in high school. “I was that weird kid who loved Jane Austen and the Bronte sisters.” For years she had dreamed about going to the annual Jane Austen Festival in Bath, England and dressing up in Regency costumes. Now was her chance to do it. “I invited my sister and 14-year old niece to join me. We didn’t know that Bath was the spa capital of England so, of course, we had to try a few spas, too. It was such a blast walking around Bath and seeing so many people dressed in Regency costumes. We had so much fun.”

The spa and trip to England were focused on activities. Martha wanted to spend the last month of her Sabbatical doing what she had never done: relax with no obligations to do anything. Martha was hardly idle. She took several day trips with her family and wrote for almost two hours every day. Besides writing in her journal, she wrote an outline for a story that she plans to turn into a performance piece.

“I do a lot of public speaking for my work, and I’m pretty good at it. That’s one thing that became clear to me during my Sabbatical. I love being on stage and telling stories. A friend suggested that I try out for the Moth Story Hour, and I’m going to do it.”

When Martha returned to work from her Sabbatical, people kept telling her that she seemed different, and she did feel different. “Before I left for my Sabbatical, I was feeling angry and brittle. I was about to turn 65, and I was feeling like I was being erased, that others, especially young people, were taking credit for my work and it made me really mad. I’ve been in the nonprofit sector for 40 years, and I never felt validated until I got the Sabbatical fellowship. Now that I’m part of the Durfee network and community and with such accomplished people, I feel encouraged to try things I never believed I deserved.”

Things were different at work, too. Her staff had stepped up while she was gone, and she could see they had more confidence in making decisions without relying on her. Meanwhile, her staff had grown substantially. “When I started as executive director, I had only two staff members. Now I have 22. Running a larger organization is different. I’m learning how to do it, and it’s going pretty well.”

Having experienced the restorative value of a Sabbatical herself, Martha was inspired to start a three-month Sabbatical program for her organization. One staff person is currently on Sabbatical and another is scheduled to go next year.

It’s now been two years since her Sabbatical and Martha is still feeling its positive effects. She’s better able to cope with the stresses of her job and has learned techniques for moderating her rage at the injustices in the world.

“Writing every day and developing a daily gratitude practice has helped. Now when my angry monkey brain takes over or I start obsessing about something, I just say “Be thankful” and I list everything I’m grateful for. You can’t believe the power of something so simple to rewire your brain.”

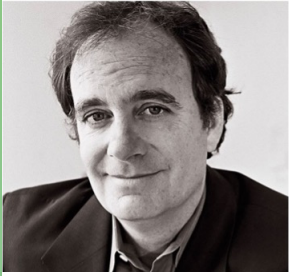
Stanton Fellow Changemakers

When the Durfee Foundation established the Stanton Fellowship in 2006, it gambled on giving grants to exceptional leaders in Los Angeles to think about difficult issues confronting their communities without knowing exactly where their initial inquiries would lead. The inquiries are meant to be processes of learning and discovery, a departure from traditional philanthropy that favors grant proposals outlining specific objectives and outcomes.

The Stanton Fellowships give grantees the gift of time—three months of intensive exploration spread over two years—and the resources to pursue their inquiries through reading, networking, probing conversations and travel to other parts of the country and even the world. Not all inquiries go as planned, nor does Durfee expect them to. It's not uncommon for Fellows to have to revise or even change their inquiries midstream or, in some cases, admit they have reached a dead end. None has been a waste of time and all have been important educational experiences. The cohorts meet quarterly over two years to keep their partners informed of their projects' progress, and assuring an ongoing learning process for the cohorts and for the Durfee board, too.

“We tell the Fellows that Stanton isn’t intended to be a linear journey,” said Claire. “It often involves left turns and surprise detours. It’s not so important that they solve a problem—though sometimes that happens! More important is that they make headway in a complex terrain, sharing lessons learned and illuminating the path for others. Often the big breakthrough happens months or years later. The two-year Stanton Fellowship ends, but the journey continues.”

For all that, a surprising number of Stanton Fellowships have hit home runs. The Durfee Foundation applauds their successes and positive impact on residents of Los Angeles County.



Jonathan Parfrey

Jonathan Parfrey received a Stanton Fellowship in 2010. At the time he was the director of the Los Angeles Affiliate for Physicians for Social Responsibility. For his Stanton project, Jonathan investigated national and international models of climate change in order to develop a plan of action. His inquiry led to his establishing Climate Action, Los Angeles's leading climate advocacy organization.



Madeline Janis

Madeline Janis was the co-founder and national policy director of Los Angeles Alliance for a New Economy (LAANE) when she was awarded the Stanton Fellowship in 2014. At the time, Los Angeles was building a rail line with imported trains. Her inquiry delved into how investment in transportation infrastructure could help create domestic manufacturing capability in Los Angeles. Madeline co-founded Jobs to Move America, (JMA) as a project of LAANE. A multimillion dollar project located primarily in Los Angeles, its goal is to use public transportation funding to create jobs in underserved communities. JMA is transforming the way public dollars are used to generate greater racial, gender, and economic justice and creating good-paying jobs for Angelenos in the transportation sector.



Chris Ko

Chris Ko received a Stanton Fellowship in 2020. His experience illustrates the professional and personal discoveries that can come from pursuing an open-ended inquiry. Chris is the managing director for Homelessness & Strategic Initiatives at the United Way of Greater Los Angeles. At the time he started his Stanton Fellowship in 2020, he had been working on the issue for 12 years. Meanwhile, Los Angeles County's homeless population kept growing. The Stanton Fellowship would allow Chris to dig deeper into the intractable housing crisis, something he would never had time to do on his job.

His original inquiry was to explore what everyday Angelenos could do to be more meaningfully involved in ending homelessness. Chris's fellowship took place in the midst of the Covid lockdown. With travel restricted, he visited local mutual aid sites and met with individuals trying different ways to help the homeless.

**“I answered my question quickly,” said Chris.
“Individuals couldn’t do much by themselves.
The people whose efforts were taking off had
found other people to do it with them.”**

Claire encouraged Chris to broaden his inquiry and not to be afraid of change. Coincidentally, United Way was approaching its 100th anniversary in 2023 and had given Chris a mandate to think about its direction over the next 100 years. “I realized that the question behind my question was what structures sustain collective action,” said Chris. “The way the Stanton Fellowship and my new job came together was a pivotal moment for me.”

Chris and the five other Stanton fellows in his cohort had bonded quickly in the face of the pandemic uncertainties. In 2021 they flew to Hawaii to reflect on their inquiries. One of the fellows, Patrisse Cullors, cofounder of the Black Lives Matter Global Network, was headed to Rwanda for her inquiry. She had already established contacts there and invited Chris to join her. For two weeks, they visited different cooperative models.

After the genocidal civil war between the Hutus and Tutsi, the Rwandan government concluded that collaborative action was the only way to heal the country. It created a government agency to incentivize and structure economic redevelopment for starting cooperatives and offered loans and technical aid. Today 80% of Rwanda adults work in some kind of cooperative.

“As my inquiry expanded, I understood that lacking a path to ownership is the root cause of homelessness,” said Chris. “Learning about cooperative models in Korea, Hawaii, the Basque country and Rwanda gave me hope that specific government laws and policies could play a critical role in developing partnerships based on shared ownership.”

Chris’s research on cooperative models resonated with his own organization’s history. United Way had originally started as a collection of 37 neighborhood-based Community Chest groups, which was right in line with Chris’s inquiry. “I started pulling on the threads of United Way’s heritage and realized we had to get back to supporting neighborhood-based efforts.”

Chris gave a presentation on his Rwanda trip to his colleagues, including videos and pictures of cooperatives ranging in size from five members to 2,200. United Way was sold on the Rwandan approach that combined building community wealth with community care. It created a multimillion-dollar grant to fund grassroots initiatives for cooperatives and has already funded seven groups in Los Angeles based on the cooperative models Chris had visited in Rwanda.

Chris's inquiry has landed him on a professional circuit. On a trip to England he visited a cooperative that led him to another cooperative in Mondragon, Spain. The connections keep coming. Chris has invited some of the people he met on his travels to Los Angeles to speak about their work and, in November, he is headed back to England where he was invited to speak at a conference on cooperatives.

“The Stanton Fellowship helped me get crystal clear about the part of my work that comes from a deeply personal place,” said Chris. “I started my Stanton travels in Korea where my parents had worked in an informal agricultural cooperative after the Korean War and where I was born. My initial inquiry felt like work. My revised inquiry is a question I’m excited about pursuing because it’s connected to my core life experiences. The Stanton Fellowship has re-centered me at work and reconnected me to myself. I’m just realizing how life changing it’s been.”



Us Durfees, 2023

The Durfee Community

The Expanding Durfee Network

The Sabbatical and Stanton Fellows make up a highly select group of some of the brightest and most innovative thinkers working in leadership positions in the Los Angeles nonprofit sector. From the start, Carrie and Claire understood the potential of a network of exceptional leaders to be a force for positive change in Los Angeles. The Sabbatical and Stanton Fellows that Durfee has nurtured over the past 20 years has grown to 180 alums and is generating the results that Carrie and Claire had imagined.

The alums represent a cross section of Los Angeles's nonprofit community. They all have full schedules and, even though finding a date convenient for everyone is difficult, Durfee staff has managed to arrange a variety of convenings each year: lunches, biannual two-day retreats for Sabbatical and Stanton Fellows and, in 2023, an all-alum retreat. The convenings are held in informal and relaxed settings where alums can learn about one another's work, swap information and bounce ideas off each other. With each convening their friendships deepen, so that when they need information or a referral for a work-related problem, they feel comfortable calling on a fellow alum.

Marqueece Harris Dawson, a 2012 Stanton Fellow, offered a personal example of how Carrie and Claire hoped the Durfee network would work. When Marqueece was first elected to the Los Angeles City Council in 2015, he was given a portfolio to work on homelessness, an issue he didn't know much about at the time. The first person he thought to call for advice was Adam Murray, a member of his 2012 cohort. Adam was executive director of the Inner City Law Center that provided services to people living on Los Angeles's Skid Row. He was able to give Marqueece resources and references to begin working on the issue. "Reaching out to fellow alums happens a lot," said Claire, "because they've built up a lot of trust spending time together at retreats over the years."

A common saying among alums is: We didn't just get a Durfee fellowship, we got a community.

“There’s a real pride in being a Durfee fellow,” said Lisa Watson. “When you go to your first retreat and meet other alums — CEOs and executive directors who are changing Los Angeles—you think, Wow, I’m part of a high-level peer group I can learn from and call on if I have questions about something in my organization. It’s an automatic friendship group; you immediately feel connected, even to alums outside of your cohort group. That’s not something most people in the nonprofit sector get to experience.”

Because the Durfee staff build strong relationships with the alums, they stay connected long after their fellowships end. The alums represent a vast reservoir of collective knowledge and organizational experience that the Durfee Foundation can draw on for advice and service. The Durfee Foundation is unusual in inviting former grant partners to serve on the Durfee Board. Since opening the board to members outside of the family, many of the community trustees who have served on the board have been former Sabbatical and Stanton fellows. Fellows are also hired as paid mentors to Springboard grant partners, and at least three program alums serve on selection panels for Sabbatical and Stanton Fellowships. Besides offering their perspectives on the candidates, the experience deepens the alums’ bond with the new fellows and with the program.

Robin Kramer probably knows the Durfee Foundation more intimately than anyone outside of the family trustees. She was one of the first community members to be invited to serve on the board in 2010 and has facilitated all of its retreats. Carrie and Claire also invited Robin to be the first advisor to the Sabbatical and Stanton programs, so she has had a front-row seat in watching the Durfee community develop and grow.

“Durfee is a courageous funder,” said Robin. “When it commits to something, it’s in it for the long haul. Carrie and Claire have been building bridges between leaders within and across nonprofit sectors for over 20 years. Because of the horizontal nature of our community and the tendency of people to work in silos, connections don’t just happen on their own. If not for the determined, careful work of Carrie and Claire, this amazing network of people working at the top of their fields—or even the possibility of such a network—would not exist.”

The 2023 All-Fellows Retreat



*Durfee fellows
at 2023 All
Fellows Retreat*

all, some or none of the sessions or spend the day napping or at the beach. The time is theirs to use as they please, but most choose to join their colleagues at sessions and meals.

Alums could choose from a schedule of talking and doing sessions. Transitions and succession were on everyone's mind as this was the last time Carrie and Claire would attend a Durfee retreat before their departures. Alums led two peer-to-peer sessions where fellows could swap stories about leadership transitions in their organizations, and Theo and Halina Avery and Doug Newkirk hosted two focus groups where alums had a chance to express their thoughts and feelings about Durfee's leadership transition. The doing sessions included activities led by alums: poetry, yoga, group singing, crocheting, walking, and even poker. The retreat was capped off with a raffle to win gift certificates to local restaurants and entertainment venues.

The roster of fellows attending the retreat read like a Who's Who in L.A.'s nonprofit sector. Several alums commented on the wealth of knowledge and experience represented by the CEOs and executive directors gathered in one place. Anyone wanting to know more about what was happening in the arts or mental health or just about any pressing issue in L.A. could find an authority on the topic to discuss it with at the retreat. Kazue Shibata, founder and executive director of Asian Pacific Health

In October 2023 Durfee hosted **Us Durfees**, a rare three-day retreat for Sabbatical and Stanton alums. One hundred alums gathered at the Portofino Hotel located on the Pacific Ocean in Redondo Beach. Like all Durfee convenings, hospitality took center stage with good food, comfortable rooms and a welcoming environment. The retreats are designed to give alums a mini-vacation: a time to relax, rest, and spend time with old and new friends. Alums are free to attend

Care Venture, Inc., received a Sabbatical Fellowship in 1998. One of the earliest alums, she has attended many convenings and always leaves feeling she has gained something valuable. “The retreats provide a dedicated time and space for me to learn from such special people and leaders,” she said. “What they share confirms or challenges my current assumptions and line of thinking and raises more questions for me to think about. It’s also a great opportunity to stay connected to Durfee. I really enjoy coming to these retreats and catching up with longtime friends and making new friends.”



The Freedom Singers

On the last evening together, Pete White, a 2010 Sabbatical Fellow and founder of the Los Angeles Community Action Network, brought The Freedom Singers to entertain the alums. The group, a musical wing of arts and culture at LA CAN, is composed of members of the Skid Row community. The rousing musicians quickly got the alums out of their chairs and moving. Program director Stella Chung closed the night as emcee of an open karaoke session.

Watching his fellow alums singing and dancing and having such a good time together, Raul Estrada said, “Durfee isn’t just about getting grants; it’s really about this community.” Raul is the executive director and CEO of El Centro de Ayuda, and a 2017 Sabbatical Fellow. “What I realized years later was that as amazing a gift this life- changing Sabbatical has been, it was not the main prize,” he said.

“Participating in these retreats with such incredible people is the prize. My becoming a member of such an amazing top shelf group was like being nominated for an Oscar. I’ll always make time to get together with my tribe, whom I affectionately refer to as Mi Durfee Familia.”

Raul was not alone in regarding the Durfee community as a family. Many others at the retreat commented on the deep bonds they’ve developed with fellow alums over the years and their pride in belonging to a very special group. “There are all kinds of families,” said one alum. “Durfee is the one everyone would want to be part of.”

The next day at the closing lunch, Carrie stood on stage, pointed at the seated alums in the dining room and said simply, “This is love,” summing up the spirit of the retreat in three words.

Transition and Succession



CicLAvia

Carrie and Claire's Remarkable Partnership



It's rare for a board president and executive director to have such long, continuous joint tenures. No one was more surprised than Carrie and Claire. When they started working together in 1996, neither would have believed they would be holding the same positions some three decades later. But then, neither had expected the work to be so stimulating nor their partnership so exhilarating and enduring.

Carrie and Claire's partnership was unusual in family philanthropy. It was an affinity between equals driven by the same desire to make the

*Claire Peeps and
Carrie Avery*

Durfee Foundation the best it could be given its resources. The stars were perfectly aligned when they started working together. The third generation had recently assumed leadership of the foundation and had no preconceived ideas of what philanthropy was supposed to be. They all agreed that Durfee didn't have to be like other foundations; it could find its own path. Innovative thinking was very much in the entrepreneurial spirit of the founder, Stan Avery, a tinkerer by nature, who continued experimenting with new ideas and products until the end of his life.

Carrie and Claire were well suited to take up the gauntlet of evolving Durfee's philanthropy with input from the board. Both were adventurous thinkers with a penchant for questioning, probing and batting ideas around. They approached grantmaking as a laboratory for experimentation, and they let their imaginations fly.

Claire's predecessor, Robbie Macfarlane, gave a few one-off awards to grantees to take sabbaticals, but he didn't have an open-application program. It took Claire to see the potential of his idea. She turned it into the sabbatical fellowship program to give overworked nonprofit leaders time off for much needed rejuvenation and reflection—a program that came to define Durfee's grantmaking.

“When Claire and I envisioned the Sabbatical program, we didn’t know that focusing on the well-being of nonprofit leaders would become Durfee’s grantmaking niche,” said Carrie. “We just kept asking ourselves what we thought was missing in philanthropy and the pieces came together.”

Durfee funds individuals, but its ultimate goal has always been to build community. Carrie and Claire quickly saw the potential of forming a network of influential Sabbatical Fellows that would grow over the years. Similarly, nine years later when the Stanton Fellowship was launched, they started developing a network of Stanton Fellows.

With support from Durfee board and staff, Carrie and Claire had a hand in every aspect of the foundation’s grantmaking. They interviewed applicants, stayed in touch with grant partners and organized and attended lunches and retreats for the Sabbatical and Stanton Fellows. And they tried to inject fun into philanthropy, balancing serious concerns with playfulness in all of their convenings.

Carrie and Claire aspired to approach grantmaking with humility. Innately thoughtful and polite, they set the tone for Durfee’s respectful and attentive interactions with grant partners. They regarded the people doing the work as the experts and organized listening sessions to hear what nonprofit leaders and staff needed or to solicit their views on program changes Durfee was contemplating. “Everything we’ve done in developing our grant programs,” said Claire, “has been because of what we learned from our grant partners.”

Carrie and Claire were kindred spirits who tapped the best in each other, making them more creative and productive as a team than they would have been separately. “One of the reasons I stayed so long at Durfee,” said Carrie, “was because I had the perfect partner in Claire. “We made each other smarter and stronger in working for the community and for Durfee, and that was the best part of what we did.”

First Discussions of the Leaders' Stepping Down

Carrie and Claire found the work so energizing and fulfilling that even after 20 years on the job, they hadn't considered stepping aside. They had occasionally talked to each other about leaving Durfee someday, but they hadn't discussed it with the board because it seemed so far off. The board wasn't thinking about it either. Carrie and Claire still brought the same curiosity and joy to their work, and the board assumed they would keep the foundation's programs and operations humming.

It wasn't until the 2016 board retreat that the topic of Carrie's and Claire's exits was broached. For the first time the trustees expressed anxiety about what would happen if one or both leaders decided to leave or got sick or got hit by a car? "We wouldn't know what to do," they said. "We need a written plan." Carrie and Claire agreed to sketch out individual succession plans and present them to the board.

Replacing the executive director was straightforward; replacing Carrie was more complicated because she held dual roles as board president, staff member and family. When Carrie became board president in 1993, Durfee did not have a program director. She offered to take on a part-time staff position. After Claire was hired, Carrie's staff job grew from two days a week to four as she and Claire took responsibility for all aspects of Durfee's time-intensive programs. The unusual arrangement worked beautifully because of their one-of-a-kind relationship.

"Carrie and I have grown together at Durfee," said Claire. "We have a very fluid way of working. We know each other so well that we often laugh about feeling like an old married couple completing each other's sentences and thoughts. We knew that our partnership was not replicable. We are a unit; if one of us left, the other one would leave, too." Durfee's grant partners see them as a unit, too, and have come to call them "Clairrie."

Carrie's and Claire's first drafts of their succession plans gave the board a road map for navigating the transitions of its two leaders. It would be revised as the official dates of their departures approached and intervening events led them to rethink their own timelines.

Carrie Contemplates Stepping Down

In 2018 Carrie took her first extended break from her responsibilities at the Durfee Foundation in 25 years. Having seen more than a 100 Sabbatical Fellows through the program, she knew the routine. She would have no contact with Durfee for three months and would use the time to reflect, relax and, most important, enjoy herself. Carrie happily complied. She traveled, visited family and friends and even volunteered to work on an election campaign. And when it ended, she was ready to return to work.

“Before the Sabbatical I couldn’t picture my life without Durfee,” she said. “That step away from the foundation planted a seed in my mind that, yes, I could have a good life apart from Durfee. It wasn’t going to be immediate, just something to think about.”

Returning from the Sabbatical, Carrie resumed her hectic schedule of planning board meetings and working with Claire on Durfee’s grant programs. Carrie, who lives in Berkeley, had been commuting twice a month, sometimes more often, between Oakland and Los Angeles airports. In late December 2019, reports started circulating of a Covid virus spreading around the world. By March 2020, it was declared a global health emergency. California, and most of the country, went into lockdown.

“I was serving on several boards and had lots of engagements scheduled,” said Carrie. “All of a sudden everything came to a screeching halt. It was almost a relief to have everything stop. I hadn’t recognized the wear and tear of all of that travel. Had I really been living at such a crazy pace?”

The pandemic gave her time to reflect on her priorities. When she started serving as president, she had expected to serve for a few years. That was before Claire was hired and they developed their extraordinary partnership. In 2020, she was at a different stage of life. In two years she would turn 60 and the following year would mark her 30th year with Durfee. The milestone anniversaries seemed like the right time to step down.

“Many leaders stay in their positions too long,” said Carrie. “I didn’t want my successor to sit around waiting for me to retire. I want to go out on a high note. Durfee has accomplished so much and I feel great to have been part of it, but now it’s time for me to move on.”

The Evolving Leadership Succession Plan

In Carrie’s first draft of a succession plan she recommended that the board form a committee to identify a board member interested, capable and ready to carry out the board president’s duties. That proved unnecessary when her cousin Theo Avery expressed interest in succeeding her. Theo had been on the board for three years and, like Carrie, is a lawyer. As one of the younger members of the third generation, Theo straddles the third and fourth generations, making him a natural bridge between the two.

Theo made clear that he was interested only in leading the board; he did not want to take on Carrie’s staff position. That solved the problem of how to untangle those two roles, and also aligned with the succession recommendations that Carrie and Claire had made to the board. Carrie’s staff position would be renamed, possibly deputy director. Changing Theo’s title to chair would also distinguish it from the title Carrie had held. As board chair, Theo would have a more traditional role of tending to board business and overseeing the foundation’s governance and operations in partnership with the Executive Director.

“Theo couldn’t be more perfect to lead,” said Carrie. “He’s smart, empathic and funny, all the qualities we could want in a leader. He’s also young, 35, just the right age to take on these responsibilities.”

Claire initially recommended that the trustees consider hiring an interim executive director for 9-12 months before hiring a permanent replacement to give themselves a better sense of what they were looking for in a new leader. But whether they sought an interim or permanent successor, she cautioned the board that not all highly qualified candidates would be well suited to working in a family organization. The new executive director would have to understand that Durfee is deeply rooted in the values of its founders and that those values guide the foundation's work and relationships with their grant partners. In addition, having a majority family presence on the board is central to the foundation's mission. In due course, Claire recommended that the board hire a professional search firm; it would be expensive but it would bring visibility, accessibility and transparency to the search process, which was important to the foundation, while also ensuring the confidentiality of applicants. She informed the board that, in keeping with best practices, she would not participate in the search for her replacement.

Now the board had a better sense of how the transition would proceed, but they were still nervous about how it would play out. One trustee finally asked Claire point blank: Have you set a date for your departure?

"I had been advised by wise people who had experience with transitions not to specify a departure date too far in advance," said Claire, "because my circumstances and Durfee's could change. But the board was dealing with so much uncertainty because of the pandemic, I thought I should tell them that I planned to leave in three to four years. I assured them that Carrie and I would not leave at the same time. And that's where we left it in 2020."

With a successor for Carrie now in place, Carrie and Claire continued talking to each other about how the transition might unfold. Needing a block of uninterrupted time to think more deeply about the ramifications of their transitions, they went to Ojai for two days to talk about their legacy. This was one of the few times they didn't see eye-to-eye. Carrie didn't think they should have a legacy and, besides, it wasn't for them to decide. Claire disagreed. "We've done this work for a long time," she said. "We've put our handprints on Durfee. And that's when we had a larger conversation about our hope that Durfee's values would continue to be the North Star of the foundation, rather than the programs. When we returned, we started having that conversation more openly with the board."

In July 2021 Carrie and Claire submitted a revised succession plan to the board with two caveats: the final decisions on how the transition is executed belongs to the board and, as the pandemic demonstrated, even the best of plans can be upended by unforeseen events. The main steps of the plan included:

- 1. Claire and Carrie each gives the board one year's notice before departing from their positions.**
- 2. The board establishes a Transition Committee to guide the selection of a new executive director, with Theo chairing the committee as he will be working closely with that person once he becomes board chair. The Transition Committee will be made up of current and former family and community trustees and program alumni.**
- 3. The Transition Committee interviews executive search firms and hires one to shepherd the process.**
- 4. The board interviews the finalists and hires the new ED.**
- 5. A new executive director assumes leadership and Claire departs.**
- 6. Carrie departs and Theo becomes board chair.**
- 7. A new chapter begins.**

Carrie and Claire later flipped the order of their departures. Carrie would leave first and Claire would follow six months later. Carrie also changed her mind about returning to the board after taking a year off.

“It’s highly unlikely I’d return,” she said. “If I did and Theo were proposing a change, the board and staff might look to me for my reaction. I want Theo to have the freedom to propose what he thinks the foundation needs without feeling like I’m looking over his shoulder. Neither the board nor the organization needs me. They’ll be in good hands with Theo.”

Carrie and Claire Engage a Consultant

The transition process was set; now Carrie and Claire had to figure out how to untangle their shared leadership. They turned to Lisa Watson, a brilliant consultant whom Carrie and Claire often sought out for her expertise on organizations. Lisa had also experienced her own leadership transition when she left her position as CEO of the Downtown Women's Center several years prior. Now they were asking Lisa to help them think through their transitions. They arranged to meet with her once a month to figure out how the work would be redistributed, what a timeline might look like, and what their roles would be.

Carrie would concentrate on the transition of leadership to Theo and on recruiting family members to the board. She would also continue in her external role representing Durfee by speaking at conferences and consulting with other foundations. To begin disconnecting from her staff responsibilities, she would reduce her work days from four to three and end her direct work on the programs. A year earlier, she had already begun shifting her programmatic work to Stella Chung, the director of program and operations. Now their weekly staff meetings with Carrie would stick to more generative topics like what lessons and insights were emerging from Durfee's programs, and how those might be shared with the board and the philanthropic sector.

Introducing Theo Avery, the New Board Chair



Theo joined the board in 2017. At the time, he didn't know much about philanthropy or the workings of a foundation. What information he had about Durfee came from his siblings, Halina, who had been on the board since 1998, and Chris and Sara who had each served two-year terms. By 2020, Theo had served as a board trustee for three years; he had a good handle on how Durfee functioned, but he still had to learn how to chair a board.

Theo Avery

Serving as board chair would be Theo's first experience in leading an organization. Even before he agreed to be Carrie's successor, Carrie and Claire had begun talking to him about Durfee's history and values and what was involved in being a board chair. Now they stepped up his preparation for his new post. Their phone calls become more focused and frequent. Carrie asked Theo to chair a couple of board meetings and participate in the preparation of the agenda and board book. For a more formal introduction to being board chair, Carrie recommended Theo attend the National Center for Family Philanthropy's Next Generation Leadership Training. From the start, Carrie stressed that she did not expect Theo to do things exactly as she had done. He was going to be a different kind of chair and should bring his own ideas to the board.

Theo would be the first leader of the board to live out of state. Although he grew up near Los Angeles, and attended UCLA Law School, he was currently living in New Orleans. The board wanted to know how it would affect his availability and Durfee's relationship with the local nonprofit community. Theo assured the board that he would come to Los Angeles as often as needed.

“Luckily, there’s a direct flight from New Orleans to LAX,” said Theo. “But since I won’t be involved with the programs, I won’t have to be in L.A. as often as Carrie was. The new executive director and staff will have more contact with Durfee’s partners.”

Besides, Theo pointed out, the trend was for families to spread across the country over time. The first and second generation board members had all lived in Los Angeles, but that changed with the third generation. The fourth generation was already scattered geographically. “I guess I’ll be the test case to see how this works out,” said Theo.

Like many people, Theo had reflected on his priorities during the pandemic. He made the big decision to wind down his law practice to spend more time with his young son. With the pause in his career, the timing was perfect for him to assume the responsibilities of board chair. Nonetheless, succeeding Carrie who had led the board so ably and for so long was daunting.

“I’ve had a few small panic attacks, “ said Theo,”but I also feel excited about what I can bring to the role. I see myself as a medium for other’s interests. I like to make sure everyone’s heard and their concerns get expressed. I’m a pretty good listener and sensitive to others’ feelings — traits Durfee values.”

For now, Theo is concentrating on ensuring a smooth transition; he is not thinking about what happens when his two-year term ends or how long he’ll stay. No one expects him to be in the chair’s position indefinitely. Most likely board leadership will turn over after a few terms, as happens in most family foundations.

The Transition Committee

On July 29, 2023, the Durfee board of trustees held an executive session. The board voted to authorize Theo as chair of the Transition Committee and to give him the authority to compose a Transition Committee. Lisa Watson had been consulting with Theo about his transition to board leader. Now, officially engaged as a transition consultant, she would work closely with him in activating the Transition Committee. “After I started working with Lisa,” said Theo, “it became apparent how immensely helpful she’d be in assisting me in the transition as a whole. Our current arrangement is a blend of those two things: a transition consultant and, when needed, a coach for anything I’m wondering about in my new role. I wouldn’t be surprised if Lisa and I continued working together after Claire’s successor is hired.”

The Transition Committee’s first order of business was recruiting three family trustee and four community members to sit on the Transition Committee. Next, it was to organize focus groups in the fall to get a sense of how Durfee’s grant partners are viewing the transition. Simultaneously, it would begin looking for search firms to scout a successor to Claire.

Carrie and Claire had done behind-the-scenes preparation for the transition, but they had informed the board that they would not participate in the search committee or have a say in selecting the new executive director. They were ready, however, to assist the Transition Committee as needed. Because they knew Durfee’s partners so well, they provided Theo with several lists: one of people they believed would be good to have on the Transition Committee, another of people who would be excellent focus group participants, and a third starter list of potential candidates for executive director to give to the search firm. “If I were an incoming board chair who didn’t have a long history with Durfee’s partners and didn’t know the people who would be great on the Transition Committee,” said Claire, “I would welcome this kind of help.”

Meanwhile, Theo and Lisa had begun talking to board members and Durfee community members to fill the seven spots on the committee. “Meeting with community members gives me a chance to hear their hopes and fears for the transition,” said Theo. “I understand that they have anxieties about how the changes will affect them. It’s to be expected.”

The transition was falling into place as planned. No one outside of the board had been as directly involved in the process as Robin Kramer. A former Durfee board member and leader in the public, private, philanthropic and nonprofit sectors for three decades, she has facilitated all of Durfee's board retreats, including its discussions on transition, giving her an insider's view of the Durfee Foundation's leadership transition.

"I have learned so much from my connection and engagement with Carrie and Claire and the board," said Robin. "They are the most planful people I've ever met. Transitions are tender as everyone who's been involved with organizations knows. The research, evaluation, reflection and around the corner thinking Durfee has done on the transition bodes very well for the foundation's future. Durfee's values have remained a guiding presence in its work. I think it will be a wonderful trampoline for the next leaders who share Durfee's values. Carrie and Claire are leaving the foundation in very good hands."

Claire Wonders What's Next for Her

The thrill of watching the programs they had started flourish made it hard for Carrie and Claire to walk away from Durfee, but the moment arrived. For Carrie, her 30th anniversary as board president was like hearing the chiming of the bells reminding her it was time to go. "I expected to feel regret or ambivalence as I approached my departure," she said. "That it hasn't happened tells me the timing is right. I feel content. I am ready for change and excited about what comes next." Carrie wants to take some time before deciding what she is going to do after leaving Durfee but she plans to stay involved with the Trust-Based Philanthropy Project.

Claire's feelings about leaving were more complicated. Once she had set her departure date, the reality hit her. "I had been doing this job for so long that my work had become who I was," said Claire. "My personal identify was totally wrapped up in the programs. Who will I be without my work?" Claire had been reluctant to talk about her worries before she and Carrie publicly announced their exits. Recognizing she needed support in processing her own departure, she engaged a transition coach to help her

think about who she wanted to be when she was no longer the executive director of Durfee. “It was a daunting process, but I came out of it feeling a lightness of spirit.” she said. “I don’t know yet what I’ll do next, but I’m a doer and a planner and I won’t be idle.” During the Covid lockdown, Claire started thinking ahead. She had coached Durfee’s program partners for years as part of her job. Becoming a professional coach seemed like a natural next step. She took a course to become a certified coach, but her friends discouraged her from making hasty decisions.

“I’m lucky to have colleagues and friends who have given me so much wisdom,” said Claire. “Think about how you want to be before thinking about what you want to do, one told me. Another said to wait to be inspired before acting. And another, a realist, advised me to lean into the awkwardness of transition because I’m in for a wobbly ride. I’m going to trust that it will come together.”

The Board of Trustees Executive Session held a closing meeting in July led by Robin Kramer that Carrie and Claire did not attend. With the transition on everyone’s mind, Robin asked the board members how they were feeling about Durfee’s future. Carrie and Claire later heard that the board was optimistic about the next chapter and eager to welcome the new leaders. “There was a collective sense of buoyancy,” said Claire. “It lifted my spirit knowing that we had all moved to such a hopeful space.”



ALMA Backyard Farms

Durfee's Grant Making Model Spreading

As president, Carrie was in a perfect position and perfectly suited to promote Durfee’s work to the larger philanthropic community. She likes to serve on boards, and she’s a natural public speaker. Over her 30 years as Durfee’s president, the number of foundations has multiplied as well as educational conferences serving them. Carrie has taken advantage of the many opportunities to serve on conference panels and promote Durfee’s grantmaking model. During her tenure, Carrie has chaired the boards of the National Center for Family Philanthropy and Northern California Grantmakers and served on the board of Grantmakers for Effective Organizations. She also chairs the steering committee of the Trust-Based Philanthropy Project. By taking leadership positions in these organizations, she has stimulated interest in the Durfee model of building open, trusting and respectful relationships between funders and grantees to a national audience of funders.

“I’m a joiner,” she said. “It’s how I’m wired. But our grant partners also encouraged us to spread the word. They want to see other foundations adopt our model.”

Claire has taken a more active role in the local nonprofit community. She chaired the board of Southern California Grantmakers and the national Grantmakers in the Arts, was a senior fellow at UCLA, teaches at USC, and has served on two LA County commissions. Together, Carrie and Claire have become the public faces of the Durfee Foundation. Through their published articles and public speaking, Durfee has achieved a level of influence in philanthropy that far exceeds its grantmaking budget. The Durfee model is catching the attention of other funders interested in starting their own versions of Sabbatical and Stanton Fellowships. Carrie has worked with a foundation in Australia that had heard about Durfee to help develop models of these programs and, closer to home, the O2 Sabbatical Award started a program to give nonprofit leaders in the Bay Area the gift of rest and relaxation.

Durfee’s Springboard Fund’s mentoring component attracted the attention of another foundation interested in starting a mentoring program. It contracted with Steve LePore, one of Durfee’s most enthusiastic and experienced mentors, to research mentorships and submit an initiative based on the Durfee model. It will likely have its program in place and ready to go by the first of the year.

Many in the nonprofit and philanthropic communities have asked what makes the Durfee Foundation's philanthropy different. Even some of the Durfee board members have asked what Durfee's secret sauce was. By all measures, Durfee has a dream board and great programs, but what distinguishes its philanthropy are its respectful and attentive relationships with its grant partners.

"Our administrative policies are based on valuing our grant partners," said Claire. "Simple things like returning phone calls, giving feedback to applicants who have been declined and always treating people with kindness go a long way in developing trust between funders and grantees."

Steve Le Pore was in the first cohort of Sabbatical fellows in 1997. He remembers his first contact with the Durfee Foundation.

"I had never met funders like this," he said, "They were so alive, so personal, so encouraging. I wanted to know these people and be part of their group. They welcomed me with open arms."

Lisa Watson had a similar response to Durfee. "I work with a lot of foundations," she said. "What makes Durfee different is its belief in the individual. They select grantees because they really believe in them and the work they're doing, and they treat them with kindness and respect. I don't know any other people who are as thoughtful and gracious in everything they do as Carrie and Claire. When applicants aren't accepted for the Sabbatical and Stanton Programs, Durfee staff invite conversations with applicants about other possible avenues to pursue their inquiries, or how to make their proposals stronger. And if grantees run into problems, they can call Claire and know she'll find someone to help them if she can't. I've never known funders who care so much about the well-being of their grant partners."

That's the secret sauce of the Durfee Foundation.

