



Lessons from the Durfee Foundation's Dual Leadership Transition

by CARRIE AVERY AND CLAIRE PEEPS

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Introduction

There are few events more monumental for organizations than leadership transition. In family philanthropy, such transitions can be complicated and challenging, especially when outgoing leaders have been in place for a long time.

One of the most important factors in a successful transition is thoughtful preparation. It's common for family philanthropy leaders and boards to avoid succession planning because it can be overwhelming and often emotional. However, succession planning and the honest conversations it requires are a gift to all stakeholders: nonprofit partners, staff and board members, outgoing leaders, and incoming leaders. A well-paced and transparent process gives these stakeholders greater peace of mind about the transition and the opportunity to weigh in about their own vision for the future.

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We left our co-leadership roles as board president and executive director in 2023 and 2024, respectively, and were delighted to be succeeded by Theo Avery, and then Halina Avery, as chair and Maria Cabildo as Durfee's new CEO. Halina and Maria have rich histories with the foundation, Halina as family member and longtime trustee, and Maria as a Durfee Fellow and valued member of that alumni community.

We are sharing the story of our intertwined staff and board leadership transitions at the Durfee Foundation, which we hope will be helpful to foundations at every stage, whether they are currently undergoing a leadership transition or taking the steps to prepare for an eventual change.



Carrie Avery (left) and Claire Peeps (right)

Background

The Los Angeles-based Durfee Foundation was founded in 1960. Carrie Avery joined the board in 1986 as one of the first third-generation family members. In 1993, she was elected president of the board, at which time she also assumed a part-time staff position. Three years later, Claire Peeps was hired as the foundation's executive director. We co-led the foundation for 28 years, with Carrie taking the lead on the governance and legal fronts and Claire on operations, finance, and grantmaking. We overlapped in most areas, and the foundation benefitted from our strong working relationship. We both found that Durfee offered a creative and inspiring environment to support changemakers in Los Angeles and to influence philanthropy more broadly. Co-leadership proved to be a boost to our inventiveness and productivity.

Co-leadership isn't necessarily a model that will work for most organizations. We were lucky; our styles meshed well, and we inspired one another. Our strong working relationship developed into a lasting friendship.

The Impetus and Framing for Transition Planning

After more than 20 years of stable co-leadership, the foundation was thriving. However, the board recognized that eventually the composition of its leadership team was bound to change. As part of its annual executive performance and compensation review in 2015, the board's compensation committee asked us to draft a succession plan.

TRANSITION TIMELINE

- 2015** • Board asks for Carrie and Claire to develop succession plan
- 2018** • Board prepares for Carrie's sabbatical
 - Durfee shifts staffing model and makes new hires
- 2019** • The foundation holds a staff retreat
- 2020** • Carrie engages a coach
- 2021** • The foundation engages a transition consultant
 - Foundation leaders inform staff members about the transition timeline
- 2022** • Claire engages a coach
- 2023** • The foundation publicly announces transition plans
 - Carrie departs
- 2024** • Theo Avery assumes board chair position
 - Foundation hires a search firm to find the next executive director
 - Durfee throws a celebratory party
 - Claire departs
- 2025** • January 1, Maria Cabildo starts as CEO
 - Halina Avery becomes board chair

The board was clear that it was happy with our leadership and wanted it to continue, but sought to open a succession conversation as part of its due diligence. The overall focus was on our nonprofit partners and the community the foundation served. We and the board prized the foundation's stability so that it could continue to work in service to the community. The last thing any of us wanted was for leadership turnover to negatively affect the community we served.

Throughout the process, we spent time thinking about how we partnered with nonprofits and each other, which practices should continue, and what a new leader could continue to build upon. It prompted us to better articulate our roles and responsibilities. While Claire documented what a search for her replacement might entail, Carrie wrote a memo recommending that her position as both a board and staff member be decoupled in the future, giving her board duties to a new board chair and her staff duties to a senior staff member in a yet-to-be-established position. Ultimately, the process to prepare for our transitions made us better leaders during the remainder of our tenures and strengthened the board and staff members' understanding of the roles and duties of Durfee's senior leaders.

One of our nonprofit partners, the Community Coalition, maintains an intentional practice of "living in succession planning." The organization constantly cross-trains staff members, searches for upcoming talent, and makes sure it is never in a bind if a critical staff or board member leaves the organization. We had a lot to learn from our partner and sought to adopt its framework.

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Practices for a Successful Leadership Transition

Our transition process involved trial and error, with both successes and some missteps. Based on our experience, here are the practices that we would recommend other foundations embrace to prepare for a leadership transition, regardless of their size or structure.

Create Space for Reflection and Connection



We had established the practice of holding three-day board retreats, typically every other summer with some exceptions for critical moments such as the height of the COVID-19 pandemic. We designed the retreats to provide a space to reflect on Durfee's work, anticipate challenges, and come to a consensus about how to move forward in the future. We often incorporated visits to our nonprofit partners to bring Durfee's work to life for the board. We also prioritized fun! By sharing stories, playlists, and activities, the board members deepened their relationships with one another and built trust.

In retrospect, we realize that these retreats became the signposts along the road to succession planning, offering a steady, well-paced ramp to our eventual transitions. They gave us a forum to talk about the nuts and bolts of succession planning when the time came, and provided us with the opportunity to do some big-picture thinking and chart a collective path forward on a regular basis.

Our board understood retreats to be a place for frank conversations and strategic thinking. Carrie's memo about shifting the staffing structure was the basis of discussion at the 2016 retreat, where the board had its first collective conversation about the mechanics of our shared leadership and what a future with a more traditional board chair/CEO structure could look like. Trustees were candid; some expressed anxiety about our inevitable departures. We were grateful that past retreats had created the expectation that deep, honest conversation was the norm. In subsequent retreats prior to our departures, we talked about transition timing, our hopes for the future of the foundation,

and our concerns. The practice of stepping back and thinking deeply in a retreat setting gave us the skills and a designated space to address succession planning when the time became right.

We strongly recommend that funders establish routine gatherings that support meaningful reflection and the opportunity to broach weighty topics long before they embark on succession planning.



Focus on Your Values

Like many family foundations, we frequently turned to our values to ground and guide us, particularly when we were wrestling with big decisions or significant change. Succession planning was no different.

Our 2018 retreat addressed Carrie’s then-upcoming three-month sabbatical (Claire had taken a sabbatical in a prior year). Preparing for Carrie’s short-term departure dovetailed into conversations about her eventual long-term departure. Specifically, the board wanted to understand Durfee’s “secret sauce.” How did we build and maintain our relationships and reputation in the community? How did we imagine and create grant programs that were responsive to community needs in Los Angeles? What would it look like to continue that under future leadership? These questions led to the next step in our succession planning process: articulating how Durfee’s mission and values show up in day-to-day practice at the foundation. Many of the practices are cornerstones of trust-based philanthropy (Durfee was an early partner with the [Trust-Based Philanthropy Project](#)) and demonstrated our values in action. The board’s confidence in our secret sauce was, in essence, trust in the way we brought our values to life in the work and affirmed that we were aligned on rooting the transition process in our values.

As we articulated what was in our secret sauce, we affirmed that, while Durfee’s programs would change over time, Durfee’s mission should always be its North Star. We didn’t want the board or staff members to feel constrained to sustain existing programs in perpetuity. Over the years, we had invested a significant amount of time with our trustees honing our mission and values, and we hoped they would continue to guide current and future leaders of the foundation.



Taper Your Engagement and Time Your Exit

In 2019, we held a staff retreat, one day of which involved just the two of us so we could focus on transition planning. We decided that we wouldn't leave the foundation at exactly the same time, but within one year of each other. We believed it would be beneficial for the foundation to bring on a new executive director and a new board chair in the same general time frame while maintaining continuity with other staff and board members. Originally, Claire planned to exit first. As time went on, Carrie felt that she was ready to move on to the next phase of her life. She also recognized that her cousin, Theo Avery, was ready for leadership and she didn't want to make him wait in the wings for an extended period.

After conferring with several people, we decided that Carrie would depart at the end of 2023. Theo would become board chair at the start of 2024 and would chair the transition committee that would manage the search for Claire's successor.

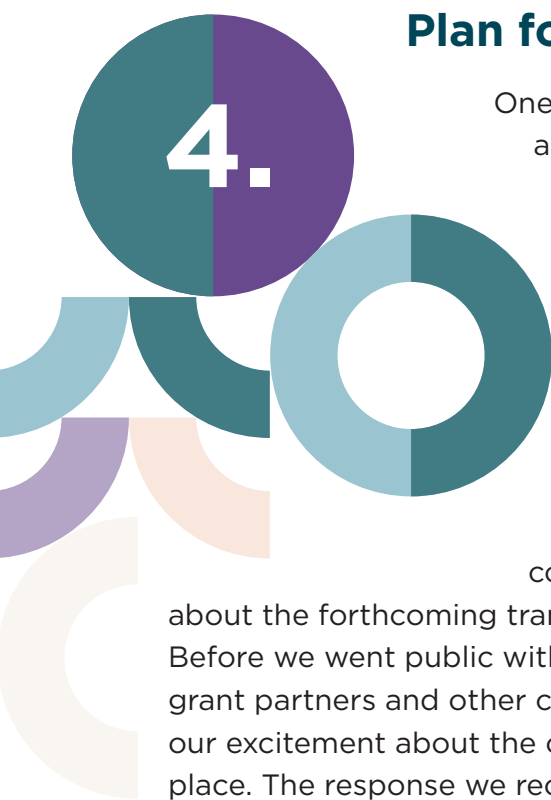
After we determined Carrie's exit date, she began to taper her work at the foundation to give everyone the chance to adjust before she left her dual roles altogether. She stopped most of her direct involvement with Durfee's grantmaking and began working at a 60-percent schedule. She focused on preparing Theo for his new role as chair by including him on board agenda preparation, asking him to chair board meetings, and adding him to the one-on-one calls she did with each trustee as part of their annual board self-assessment.

Weaning Carrie's involvement was difficult for each of us personally. We had become friends as much as colleagues, and it was challenging for us to limit our communications to a few days a week.

However, from an organizational perspective, tapering Carrie's engagement was an effective process. The staff members were able to strengthen their relationships and plan for a significant redistribution of responsibilities. Notably, Program Director Stella Chung prepared to assume a more senior management role, which would be critical to the successful onboarding of the new CEO. The team spent time building a four-year plan, taking advantage of Claire's expertise to help craft future programs that she would not be around to implement. They met with Theo regularly to grow their relationship with him and help familiarize him with the full scope of the foundation's work.

We planned for Claire to overlap with her successor, but the search process took longer than anticipated and resulted in a three-month gap between Claire's departure date and Maria's start date. We addressed this by extending our transition consultant's engagement and asking Carrie and Claire to serve on retainer in 2025.

We would have preferred that Claire and Maria had overlapped and would recommend that practice to other funders. However, we had to be flexible with the search process. While the timing was less than ideal, the board's willingness to extend our contracts and offer support to the staff team helped smooth out some of the bumps the delay had created.



Plan for Communications

One of the most critical parts of our transition was telling people about it. Our years of planning would not be effective if we left a new leader to face anxious staff members and nonprofit partners who were uncertain about the future or felt blindsided by the process. A strong communications plan that balanced seeking input and sharing information was very important.

A [communications strategy](#) that outlines who needs to know about the transition, when, and from whom, is an essential part of transition planning. As part of our communication strategy, we informed our staff members in 2021 about the forthcoming transition but asked them to keep the evolving plans confidential. Before we went public with the news in summer 2023, we sent a personal email to our grant partners and other colleagues with whom we worked closely. We wanted to share our excitement about the changes ahead and reassure them that a solid plan was in place. The response we received was both loving and anxious, but overall affirmative. Soon after the foundation posted an announcement about our planned departures on its website and LinkedIn.

An impending leadership transition can create unknowns and be anxiety-provoking for all of your stakeholders. Think about ways that you can mitigate the emotional toll by reducing uncertainty to the extent possible. The Durfee board hosted special sessions for our partners, described below, that quelled unease.



Solicit Input but Set Expectations

Durfee has a long history of gathering feedback from our nonprofit partners as well as applicants who were declined. We couldn't imagine starting a CEO search without consulting our community. However, throughout the transition process, we had to continue to learn to balance internal and external stakeholder feedback as well as transparency and privacy.

FORMING A TRANSITION COMMITTEE

We felt it was important for the search committee leading the process for a new executive director to include a wide range of perspectives beyond the foundation's board members. The incoming chair, Theo Avery, and two family trustees joined the committee as well as four seasoned nonprofit CEOs—all former Durfee fellows—who knew the Los Angeles nonprofit landscape well.

INPUT FROM THE COMMUNITY

At a retreat Durfee hosted for its current and past fellows from its [Sabbatical](#) and [Stanton](#) programs in fall of 2023 we took the opportunity to include two optional focus group sessions to talk about Durfee's leadership transition. Approximately 40 fellows attended the two sessions, allowing many voices to be heard. Carrie and Claire did not attend; we wanted participants to be able to speak freely. Theo and other members of the transition committee kicked off the discussions.

The transition committee created the questions below, which were displayed on posters to prompt discussion:

- What shifts or emerging issues in the landscape/operating environment should be on our radar and inform our search process?
- What assumptions could we make regarding the characteristics of the new executive director? What traits would a “right” or “wrong” hire have? What might be Durfee's biggest challenge in finding the right hire?
- Imagine the new executive director has been hired. What one-sentence piece of advice would you give to them?
- What's sacred to the role of Durfee's executive director? Are there any ways we might re-imagine the role?
- What is your greatest hope for the transition? What do you feel could be gained?

Participants were invited to write notes on the posters, as well as to engage each other and the committee in conversation. The fellows offered many practical suggestions for the search, but the overall thrust of the conversations was an affirmation of Durfee’s mission and culture of trust and respect, with an expectation and hope that it would be sustained.

Additionally, we offered two virtual listening sessions with nonprofit partners from Durfee’s [Lark](#) and [Springboard](#) programs. We received similar helpful feedback. Collectively, the sessions were an important signal about our commitment to a transparent process that included many voices.

The transition committee knew it was important to seek input from Durfee’s partners but didn’t want to signal that the search belonged to the broad Durfee community. Our communications strategy was an important tool for the transition committee as it determined how and what to share with those who took the time to provide valuable feedback. The committee expressed its gratitude for the valuable insights, outlined the search process and timeline, explained that the Durfee board would be responsible for hiring the new CEO, and promised to send updates along the way. All Durfee partners received an announcement when a search firm was selected, and Theo, as chair of the committee, sent periodic updates.

INPUT FROM THE STAFF MEMBERS

Staff members also had opportunities to provide input about their visions and hopes for the future of the foundation and its new leader over the course of few years. Theo had one-on-one conversations with them, and the search consultant met with them individually and as a team to solicit their advice and concerns.

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Use External Help

Throughout the process, we benefited from the perspectives and expertise of many consultants, coaches, and partners. We were extremely fortunate to have the same facilitator for our retreats from 2012 to 2023: Robin Kramer, who became one of Durfee's first nonfamily trustees in 2010 and has a long history in philanthropy, Los Angeles politics, and nonprofit leadership. She is also supremely insightful about human nature and family dynamics. She was a welcome guide to our board over many years. Our trust in Robin and her deep understanding of Durfee's work were invaluable throughout the transition.

Durfee also engaged coaches for different team members along the way. Carrie started working with a coach in 2020, first to help navigate discussions about race and equity with board and staff members and then to help with discussions about the leadership transition. Claire started working with executive and transition coach in 2022 to help her plan for her final year at Durfee and beyond. Carrie and Claire engaged Lisa Watson to help us disentangle our shared leadership in preparation for transition; she stayed on to work with the incoming board chair in preparation for his leadership, and throughout the transition and onboarding of a new executive director. Stella Chung also worked with a coach as her leadership role at Durfee grew.

After a request-for-proposals process to identify a search consultant, the board engaged Walker and Associates to conduct the search process. The firm worked with the board members, the transition committee, and Claire to draft and post the job description for the new CEO and to vet the more than 325 applications that we received. The transition committee narrowed the list to a group of approximately 35 for further review and ultimately interviewed seven candidates. The committee then recommended three finalists to the board for in-person interviews. Walker and Associates shepherded a thorough and comprehensive review.

THE SEARCH BUDGET was about \$250,000, covering the costs of the search firm and process (including meetings, communications, focus groups, interviews, exit agreements, consulting, and retainers), farewell party, and welcome receptions.

The board engaged a management consulting firm, SullivanCotter, for guidance on options for Claire’s exit, and sought legal advice in drafting agreements. Carrie did not request an exit package, other than a modest consulting contract so that she could be available for questions. We highly recommend hiring an outside firm to guide the board on the legal parameters of exit plans.

Using consultants and coaches brought more objective voices into the conversations and gave us the space to participate in conversations, rather than facilitate them. Moreover, the process of selecting coaches, consultants, and the executive search firm required us to articulate our goals and needs, providing greater shared clarity and consensus.



Record Your History

For its 50th anniversary in 2010, Durfee commissioned Deanne Stone to update its 1999 written history and to update it again in 2023 before our exits. We have been surprised at how often we have referred to this history, and how easy it is for the details of past events to fade in the absence of a written history.

We encourage all funders to chronicle their history. A foundation’s history doesn’t need to be published or made public, though Durfee’s is posted on its website as a resource for others. What is most important is that the history is maintained for board and staff. It’s an invaluable resource for onboarding new hires and trustees and has become our in-house record of the foundation’s programmatic and governance evolution. Lessons from our history help inform our future direction and ensure all board and staff members understand our roots, past decisions, and how our values manifest themselves in our actions.

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8.

Stay Flexible and Be Patient

Throughout the transition, we faced both expected and unexpected challenges. A flexible attitude made all the difference. We found that each part of the process took longer than we thought it would.

We started talking with the board about succession planning eight years prior, in 2015. But the work really began in earnest in 2021 with the articulation of a projected timeline, and a process evolved from there. It was about two years from the time that we publicly announced our departure dates until a new CEO began.

Theo stepped into the board chair position upon Carrie's departure, which was about five months after we had publicly announced our departure dates.

Managing a transition committee, a search firm, the staff team, candidates, and conflicting schedules means that things can move slowly. Be patient and know that while thoughtfully engaging stakeholders throughout the transition may extend your timeline, it will also undoubtedly lead to better outcomes and more buy-in.



9.

Celebrate Your Accomplishments

We have similar personalities in that we don't like being the center of attention. We believe that the magic of Durfee lies in the incredible work of the nonprofits we support; neither one of us wanted a party for ourselves, though we wanted to celebrate each other. In the end, we were convinced by others that we owed it to the community to give them an opportunity to say thank you and goodbye, too. We acquiesced to a joint "Clairrie" celebration. The party was amazing! It was organized by a group of Durfee fellows and took place in a beautiful outdoor space. There was live music, an open mic, good food, and good cheer. It was a sweet and fitting way to say goodbye.

The Next Chapter

Much of our transition process relied on a commitment to be curious, reflective, and open. We had to ask questions of ourselves, our community members, and our colleagues, and reflect deeply on what should carry forward and what might remain in the past.

While the process for us was deeply personal—after all, this had been our life’s work—we centered the mission of the foundation. This allowed us to consider our leadership and the foundation’s structure in more objective ways as we planned for the future. What traits make each of us a good leader and are important for the next leader to have? What would we do differently if we could start again? Some of our reflections illuminated areas for growth but they also allowed us to reflect on our accomplishments, how we had contributed to the foundation’s success, and what parts of our styles and skills would be valuable to have in a new leader. By positioning the reflection that accompanies succession planning as a part of meeting our mission and strengthening the organization, the purpose and process of the transition became rooted in the foundation’s impact.

Unanticipated challenges continued to arise after Maria joined the team. There were small snafus—delays in getting Maria plugged in to Durfee’s digital technology and financial accounts. There were also larger, unanticipated events: Los Angeles’s historic and devastating wildfires struck during Maria’s first week. Many leaders and staff members of Durfee partner organizations sustained terrible losses from the fires, throwing Maria and Durfee into emergency response mode. And with a new administration in Washington, DC, suspension of federal grants to nonprofits was causing upheaval among Durfee’s nonprofit partners.

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The crises also upended plans for a welcome reception and Durfee's biennial awards ceremony. We had to cancel and reschedule events. Maria's early adaptability is a testament to her leadership.

Our board also experienced unexpected changes following our departures. After an intense year of chairing the board and the transition committee, and with professional changes in his own life, Theo decided to step back from leadership. He remains on the Durfee board, but, in 2025, Halina Avery, Theo's sister, transitioned to the board chair role. Halina was strongly positioned to step in: she was a member of the transition committee that recommended Maria's hiring and has sat on the foundation board for more than 25 years. She has been working with Lisa and Maria to navigate the on-ramping process.

Maria is known throughout the Durfee community and beyond as an exemplar of trust, bridge building, and creativity. Born and raised in Los Angeles, she was the co-founder and longtime leader of the East Los Angeles Community Corporation, an anchor institution in community development. She has also worked in government and philanthropy, is an alum of the Durfee Sabbatical and Stanton Fellowships, and has served as a mentor and consultant to Durfee programs. We know that she will be rooted in the foundation's mission and continue to extend Durfee's impact. We were honored to leave the foundation in her capable hands and grateful for the board's request back in 2015 that we get started on living into succession planning.



ABOUT THE AUTHORS

[Carrie Avery](#) is the former president of the Durfee Foundation and [Claire Peeps](#) is the former executive director.

ABOUT THE NATIONAL CENTER FOR FAMILY PHILANTHROPY

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