

# Ep #16: Engaging New Board Members in Your Family Foundation with Theo Avery



## Full Episode Transcript

With Your Host

**Ellie Frey Zagel**

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Well, hello. This is Episode 16, part of a three-part series, in collaboration with the National Center for Family Philanthropy, on engaging adults and family philanthropy. Enjoy.

Welcome to *The Family Business Leader Podcast*. A podcast for multigenerational family business leaders who want to become the leader they were meant to be. If you're ready to learn how to develop your own authentic leadership style, successfully lead your family business, and create your own lasting legacy while still honoring theirs, this is the podcast for you. I'm your host, Ellie Frey Zagel, family business leadership coach and third-generation family business leader. Let's get to it.

Ellie Frey Zagel: Hi, there, it is been a while. Hope you're doing well. I'm so excited to relaunch this podcast, after probably about a year, I think. With probably, at least three episodes on engaging adults in family philanthropy. I'm doing this work in conjunction with the National Center for Family Philanthropy.

I am honored to moderate a session on this topic, engaging adults in family philanthropy, with my cousin and two other people. And, I'm going to have all three of them on this podcast. So, what I'm hoping is, I've never tried this before, what I'm hoping, is not only do my listeners get to have access to these interviews, but also those who are going to be listening in the audience, at the National Center for Family Philanthropy's forum in October.

We'll also have access to further in-depth discussion with the panelists. So, keep your fingers crossed. I hope that it goes well. I know these interviews are already awesome.

So, today, I'm going to interview an awesome third generation, named Theo Avery. He is, as I mentioned, third generation of the Durfee Foundation. Now, I want to just to quickly share, like, why family philanthropy, in *The Family Business Leader Podcast*. So many of my

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clients, not only work with their family, in, around the family business, but also around the boardroom table, in like, a family office or a family foundation.

So, you can work with your family, and you can lead your family in so many different avenues. It's pretty cool actually, to think about it. So, I am a third generation of a family foundation. Our family business was sold; it was a bank, an insurance company, and it was sold many years ago. And the endowment went to endow the family foundation.

So, I really get to participate, on a very regular basis, with my family, and cousins, and siblings, around the boardroom table in a place-based foundation called, the Frey Foundation. So, this is very relevant to the work that we're doing here, at *The Family Business Leader Podcast*.

And I'm laughing, because I just realized that I think I called the podcast episode Successful Generations, which is my business name. I changed the podcast name to *The Family Business Leader*. So, you'll have to bear with me a little bit, as I get my feet under me after kind of a year hiatus.

So alright, my friends, I missed you. And, I hope you enjoy these interviews.

Ellie: Hi, Theo, welcome to Successful Generations.

Theo Avery: Thanks for having me.

Ellie: Thank you so much for being here. Let's start off with, do you mind introducing yourself?

Theo: Sure. So, my name is Theo Avery. You know, certainly, as it relates to family philanthropy, I am technically a third generation. But age wise, I

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really feel more like a fourth-generation family board member, for the Durfee Foundation. Which was started by my grandfather and his wife; it bears actually, his wife's maiden name, back in 1960.

And my dad was part of it at one point, and then his siblings and their children are a part of it later. Myself and a couple of my siblings, from my dad, also have joined.

And yeah, I live in New Orleans, Louisiana with my wife. I'm an attorney by trade, but I really wound down my practice. I grew up in California. And, boy, I wish I had more remarkable things say about myself and my life, but that's pretty much it.

Ellie: Fantastic. Thank you so much. So, today we're talking about really engaging, specifically, adults into family philanthropy. And so, what I'd like to start with like, is how were you in engaged or how did you get involved with your family's philanthropy? And then, ultimately, be on the board of Durfee?

Theo: Sure. So, it is a bit of an interesting story, that I imagine is relatable to a lot of families and situations, since. But it wasn't a totally straight line, it was a little bit of circuitous path, in the sense that my dad was on the foundation at one point, had left the Durfee Foundation, had, I think, tried to rejoin at a point. Ended up having a rift with his siblings and their children.

So, other people involved with the board at Durfee foundation, and as a result, just sort of walked away. And as a result, we weren't engaged it because my father wasn't engaged in it. So, our sort of sides of the family stayed relatively separate.,

And then my dad passed away in 2012. Boy, I'm trying to remember how old I was, maybe 24 or 25. At the time, I was in law school. When my dad

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passed away, it really kind of opened the door for my side of the family, for his children, to communicate more with their aunts and uncles and their children, who were still involved in the Durfee Foundation.

And they really, to their credit, did a wonderful job of reaching out to us and engaging us. And asking us, those of us who were adult age... I was actually the youngest, so I was sort of the last one to be invited on, but only a year or two behind. Asked if we wanted to be involved in, and they engaged us and put us through an onboarding process.

And yeah, so the existing board members really did a fantastic job of reaching out to us and getting us involved.

Ellie: Can you talk a little bit about that experience? And by the way, I'm so sorry to hear about your dad. But I think it's a really interesting... This happens a lot in families, where one family member goes off on their own, and the kids don't have any experience with the foundation. This has happened in my family, as well. Actually, each generation it's happened.

And the rest of the family members, like, how do you and when do you try to engage, either that person or their kids with the dynamics that are there? So, I was just wondering if you wouldn't mind... So, the point being made that your family members contacted you and your... Do you have siblings?

Theo: Several, yeah.

Ellie: Okay. Like, how did they ask you? And then, how did they onboard you, once you said yes?

Theo: Sure. So, it is a little complicated, too, because I do have one sister, my father's daughter, who was already part of the Durfee foundation, but

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she was quite a bit older. So, she had joined, and she had a much closer relationship with my cousins, who primarily composed the board.

For example, Carrie's, the Board Chair and President. So, she had a closer relationship with them. Whereas myself and my other two siblings from my father, we were more kind of sequestered under my father. I guess, we didn't have really independent relationships with my cousins. So, I think it was just awkward for everybody. You know, it felt like it would be tension flaring, I suppose.

Honestly, if I did talk about it with my cousins very much, I don't remember the conversations. But my guess is, it would have felt kind of like inflammatory to reach out to us and try and engage us. And that probably just felt like, we don't want to stir that pie, of the relationship with my dad and how it had ended.

So, I think that's why, probably, when my dad passed, felt like, okay, a barrier had come down. And they were proactive in engaging us. And because my siblings were older, they engaged them first. I mean, if I recall correctly, they did engage me at the same time, but just sort of said, like; it may not be appropriate for you at this time. You're still in law school, etc.

So, they did a really good job. I think they tried to be very thoughtful. You know, I remember like, one of the first things they invited me to was like a retreat, they were having a board retreat, and they invited me out there. And they had a separate thing for younger family members who hadn't joined the board, yet. But you know, probably would at some point.

And they just had sort of an educational aside for us. And then, obviously, let us participate in some of the activities that they had going on at the board retreat. So, it gave us a sense of what was going on, and also really

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sent the message to us that like; hey, some day we expect you to join, if you're interested.

And they were very clear on that message, and just provided us opportunities for education. To participate in things like, you know, if there were events going on from CFP, for example. And if we wanted to engage in those, they gave us those opportunities. And, they really encouraged us to participate.

And then, of course, once we actually, formally, began the onboarding process, there's some more formal steps that, like, participating on a selection panel for a grant. Obviously attending board meetings, things like that, where they expect you to sort of learn the ropes a bit, of being a trustee before you actually become one.

Really learn what the foundation does. So, there's a formal onboarding process, but they did a lot to informally engage us before that.

Ellie: Okay, that's so fantastic. So, what I heard, is like, you're in your 20's at this time. And maybe even your siblings, because you said you're the youngest of the third. So, you've got older siblings that were also engaged?

Theo: Nice. I always try and simplify it. And, I think I just leave too many loose ends. But I am the youngest of eight children. Not all of them are from my father. I am the fourth of my father's biological children. So, yeah.

Ellie: We get it. Totally get it.

Theo: I'm familiar. I know it's difficult family stuff.



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Ellie: Yeah, exactly. They invited you to come to retreats, and the retreats, or maybe board activities, and maybe some education. Did you maybe, go on site visits or something like that?

Theo: Yeah, we were definitely encouraged to. I mean, I think part of what Durfee did well, you know, I think we were interested, but we weren't, couldn't be reliably engaged. I think we had stuff going on in our lives, we couldn't necessarily make stuff.

And I think if the expectation had been show up here, you know, here's where you need to attend. And here's when you need to be there. If it were strict, and hadn't been relaxed and more invitational in the way that it was, we probably, you know, we probably would have dropped out pretty quickly. I probably would have, as well.

So, one thing they did, was just they encouraged us, they invited us, and I made it when I could. But there was no pressure like; hey, maybe you want to come on the site visit seems, like it'd be a good opportunity for you. If you can't make it, no problem. So, that worked for me.

And I know, I missed a lot. And I think, you know, certainly during my early years as a board member, too, I missed a fair amount of board meetings. And I was beginning my career and I had a lot going on. I really look back and appreciate how flexible they were in engaging me and onboarding me, and give me the room to kind of do the rest of my life, and not feel like I was totally failing as a board member. So, that was really important.

Ellie: Yeah, no, I think that's incredible. One of the questions that I get asked a lot is like, how do I engage my adult children? And their lives are so, and I'm gonna use this word intentionally, busy. But you know, sometimes the culture of the foundation is a little bit less open or flexible.



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Meaning, here are the board meetings, you need to show up for all of them. You know, it doesn't matter if you have a job. We'll pay for you to get here, but you need to get here. And so, I love that you, I mean, it sounds like really your family said; we want you to participate, however you can participate.

Theo: Yeah, that's totally right. And, you know, I understand that, you know, families are so different, foundations are so different. I realize it may not work for everybody. And, I do look back on it and think, boy, it's a bit of a gamble, in the sense that when you do give people a lot of flexibility, they may just simply not show up at all. And/or may be so haphazard, that it's really not worth it.

So, it was really kind of faith that someday we would develop into, I think, more robust, and diligent, and engaged board members. But yeah, there was really just a lot of room given to us. And, I think it just made it... Part of the magic is, I think, it just made it approachable and made it less daunting.

You know, even though I was in law school, you know, I probably just learned the term "fiduciary" or something, you know, a month before when I was engaged. And I know, talking with other people, that things like being on a board; what is a board? Why does it exist? What's the duty of board members? can be so foreign. And it can be just sort of daunting when you're, you know, you're told we want you to join board, and you have to be at these meetings.

I mean, it may just be sort of overwhelming. So, I think part of just feeling like, you have an escape valve, and you don't have to be there, and it's not too much pressure, I think it can just make it more approachable for people who might be a little intimidated by the process. It worked for me.

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And I think it's part of the culture, we're trying to keep up and engaging the next generation. But, you know, I also know it's difficult. It's difficult to manage if you have a board member who's not engaged in participating, and/or who's really unreliable. I mean, that's really challenging. So, it's a tough balancing act.

Ellie: Yeah. Now, I want to back up for a second. Like, how many people do you have on your board?

Theo: Yeah, I'm trying to think off the top of my head, because we just had some departures. I want to say it's like, seven members on the board. We also have three community trustees. So actually, it must be eight, in total, now that I think about it.

But yeah, we have three community trustees, and the rest are family.

Ellie: And you do have professional staff, right? Because I know Carrie is one of them.

Theo: We do have a professional staff. Yeah, in fact, our staff just expanded to five people. Only, one of which is a board member, my cousin Carrie, who's Board Chair and President.

Ellie: Okay. All right. So, that kind of gives us a little bit of context for like, how many people are on the board and the responsibilities. So, Theo, if you don't mind, I'd love to go back to like, how did they onboard you? So now, that you're in engaged, they made it very open and encouraging, and not daunting, you know, welcomed you, it seems like.

Can you give me some specifics on the onboarding? I think you've already touched on them. But if you can get even more specific, like, how did they

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onboard you into it? Because you went to a trustee to the full board, right? Like there wasn't a junior board or anything like that? There was just...

Theo: I learned about junior boards recently; it was a class. And really, I just didn't have any idea. Yeah, no. We start as sort of a provisional trustee when you're in the onboarding process, and then, you know, you get voted. Hopefully get voted, and made as a full-fledged trustee. And we do have ... One of the things about Carrie, is she also is an attorney, and she was a practicing attorney before she really stepped into her role on the foundation.

And so, she's done a great job of like, formalizing everything. So, we have a very clear board manual, with our policies, with details on the onboarding process. So, I do know that we have a board manual, and it has some specifications for the onboarding process. I think there's a requirement that you sit on, I think, at least one selection panel. That you attend a certain number of board meetings. I think maybe, even a site visit may be in there.

So, there are kind of specific hoops that we're expected to go through, in terms of just participating in the functions of the board, and also gaining an appreciation of the work, the foundation. So, things you must do, to do that. But I think outside of that, there was just a lot of working with me for my engagement. Just saying, at the time, especially when I was onboarding, and I was living in Southern California, and I wasn't that far away.

So, it's like; Hey, we're having this event. Do you want to attend? Do you want to attend the site visit? Do you want to participate in this? They really encourage board members to participate, and be involved in what's going on at the foundation, which is wonderful. I think, especially when you're onboarding, I think it's a good opportunity to do that.

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But also, Carrie scheduled regular calls with me; she does it with all the board members. But I think during the onboarding process, I don't recall if they were more frequent, but you know, I think they're more pointed of; how's it coming along, you know, you're onboarding? Do you have questions? You know, talked about the history of the foundation. And, answered questions I had.

And, you know, her and our Executive Director, Claire Peeps, they were just wonderful in just being responsive if I had questions, answering them. If they thought an educational opportunity, like participating in some conference or something, might be interesting or good for me, they'd pose it.

And there's just a lot of provisions, too, for providing, I think, paying for things like attendance at conferences, and education of trustees, and engagement of trustees. And also, you know, there's things that the foundation just does in general. Like, we have a weekly email that gives us some update on some things.

Just a little email that comes out and tells us something that happened at the foundation. And gives a little update, usually with a photo, and it just helps you feel like you know what's going on. And, you get little updates and all those things help keep it on your radar, and keep you focused, and keep you engaged, I think are especially valuable during the onboarding process.

Ellie: And, probably keeping you engaged as a board member. I mean, just everything that you mentioned, with the communication between you and the team. And I just think that's fantastic, too. Again, you've got a lot of things that you can do, a lot of things that you are doing, including raising a little guy. Keeping things top of mind, I think is really important these days. How long was your onboarding process?

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Theo: Boy, I know, I should know this off the top my head, because I think it is the same every time. I think it's either one year or two years.

Ellie: So, like, maybe one to two years.

Theo: Yeah, I think that's right.

Ellie: Because you need to go to a certain number of board meetings. You need to be on the selection panel or committee. Is that for additional board members, or what is that selection...?

Theo: So, the selection panel, that's for grants. We have very regular grant programs, we have specific grant programs, and they have a cycle, like a two-year cycle, for example. Or, just being involved in one of the selection panels.

Ellie: Am I missing anything, Theo, about the onboarding process? You have, I mean, it's quite robust.

Theo: No, not in particular, I'd say, you know, we are expected to attend meetings in person. At least that was traditionally how it was, but they're very flexible about [inaudible] if you miss a particular board meeting, if you want to attend by Zoom®, or call in, that's always been allowed. Obviously, the pandemic made that par for the course, where everyone was Zooming in. And we're still in, as I'm sure it's true for everybody else, the awkward transition phase of trying to figure out what the balance is at this point.

But we just had a recent board meeting that was in person, and I think that's the hope for the standard, going forward. I think there is kind of a magic to meeting in person. And, I say that as someone that live much

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further away than most of the family, and does appreciate Zoom. But I think it really helps to be there in person.

Ellie: I totally agree. And I know that staff, for us at Frey, they also like to see our faces.

Theo: Yeah, that's another aspect of it, for sure. I think the connection part, you know, the lunchtime conversation, I think that stuff is really powerful. And I mean, the staff really does a wonderful job to, usually making our board meetings have some kind of aspect to it.

Where we have one of our grantees come and talk to us, or there's some other sort of event aspect to it, that helps connect the board to the work that's going on at the foundation.

Ellie: I think that's really powerful. Whenever we can do that, whether it's through site visits, or education, or meeting executive directors. I know that my cousins and siblings live all over the country, and, they don't live in town. And we're a place-based foundation, so when they come in, they are able to meet executive directors, or kind of learn about some of the initiatives that are happening in the areas that we give.

And, that is more meaningful for them. They, whenever the executive directors' names come up later, they're like; oh, I met them. And, they get very excited.

Theo: Yeah, yeah. That's one thing we try to do too, is we typically host our board, and one of our grantees ends up providing the location for our board meeting. So, it always ends up being fun and interesting, because they're there usually, at least, to come and speak with us.

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And you get to also see parts of their work. And it's just something that makes it memorable. I completely, what you said, really resonates with me. I think those conversations and those interactions stand out for me from all of our board meetings, for sure.

Ellie: Fantastic. So, I wanted to switch to the fourth generation. Are there any fourth-generation that are starting to get engaged? Are you starting to engage the fourth generation? Or, are they still too young? Or, where are you in that process?

Theo: Yes, we do have one onboarding fourth-generation board member now, which is really great. And I'm actually talking with him tonight. You know, we're going through some transition at the foundation. Since that, on the visible horizon, you know, we do expect to have a transition, both with our Board Chair and with our Executive Director.

And eventually, you know, it's occurred to me that A; you know, in a decade or two or something, it could be just me and this fourth-generation board member, and one or two others. So, I think, as it's dawned on me, we've started thinking about, you know, just that engagement aspect of; okay, how do we engage the next generation but also realizing like, the next generation is going to be really important. And the prior generation is probably going to, you know, more and more, they've started to take breaks from the board and such. And so, now, I'm trying to have, just myself...

And I'm, you know, currently expected to be the Board Chair, at least for the time being, once Carrie transitions out of that role. So, at least I'll be the first successive Board Chair. And so, just thinking about having more responsibility for the foundation, and having, you know, obviously, the new generation having a bigger and bigger role.



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So, from my perspective, I just want to start talking about; hey, what do you envision for the foundation? Like, what are you feeling? You know, what are you thinking, as you're going into this? And get him to start thinking, with me, about the future. And just make sure that we kind of walk into it with some clarity of mind, and intent, and purpose.

About what we're doing, what we want to do, and what's important to us about the foundation. And not just suddenly find ourselves notified that, you know, three board members have left and it's like; oh, hey, you know, here we are.

So, yeah, sorry, that was kind of a long-winded thing.

Ellie: No, that's fantastic. What are some of the like, what are the things that you envision? So, it seems like you have your path set in front of you. And you have at least one fourth-generation going to join you. Like, do you have any thoughts about engaging anybody else? Or, some additional, you know, community members? Or, have you even been able to kind of think about what you want to do in the future?

Theo: Yes, we definitely... There are several other fourth generation potential board members, and it's really just like, we do envision, we certainly expect some will join, in time. Just, so far in our engagement and communication with them, like they just, right now, their focus is totally elsewhere, and just doesn't seem like the right time.

So, that will be part of the picture at some point. But right now, it's just really this one other fourth generation. I mean, for me, I am just one trustee, obviously, just one family member. So, I can't really... And ultimately, what happens at the foundation is the result of our votes.

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So, it's sort of the balance of our collective vision for the foundation. But, you know, as I've said, the longer I've been on the board, the more I really appreciate the history of what brought us where we are. It's really been a slow, I mean, just iterative process over time, of getting to where we are with our programs, what we do, with how we do it.

And at least to me, the more I've learned about the story, the more I feel like it's been shaped by the community. We are also placed-based. And, you know, when we started out, I mean, the initial grant programs, it was really just like; okay, you know, board members, what do you want to do? And, they came up with some zany ideas.

I know, you know, like one that always stands out to me, is we had a program where we were just sending people to China, at a time where people really weren't traveling to China, I think this is in 60's and 70's. And we were very clear like, we do not want to send the professor that wants to go study, you know, calligraphy or something. We want to send, you know, the landscaper who has a pen pal somewhere. We want to send the surfer who always wanted to surf the waves in China.

So, we were just sort of like, having this fun process and doing these kinds of zany things. I think over time, it just, we ended up having more experiences, we spoke more with our grantees, we engaged more with the community, got more feedback, and then slowly refined what we do. And it's turned into, you know, several grant programs where we think there's a need for the grant program.

And it's also just been so heavily informed by a combination of our experiences, the input of the staff, and really importantly, the input of the community. And I just emphasize like, how much I think the community's voice, and input, and influence, has grown over time to really shape our foundation.

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Now, it's really like a bedrock, especially having community trustees. And I just, I really see the value of it. The insight that community trustees bring to the board decisions has been so valuable. They've been such wonderful, just colleagues and board members.

And on top of that, I think it's just really made us effective in a way that we wouldn't otherwise be effective. To really appreciate where the need is, and how to go about philanthropy in a way that we think is best and effective.

So, looking into the future, I just, I really want to use that as kind of my North Star. I think with time, my own evolution as board member initially, I came in thinking like; oh, this is cool. Do I get to decide, you know, what to do with some money? Or, you know, am I gonna get to send someone random China, or what's going on here?

I think it's been a long process, and a variety of experiences have informed it, but I really look at it now and think like; oh, wow, I'm really like, you know, a steward here, of the foundation's resources. And it's really important and valuable work. And it's really powerful, and it really makes an impact.

And the more input I can get from people who are close to the need, and really well-positioned to understand how to do this best, the better. So, I just continue to see communities having a big role. Just so long as it wants to be a family foundation, which I do think we want to keep it, I'm sure family members will outnumber community board members. But you know, I think the ratio will be very close to half.

And yeah, for me, I just really like, that's sort of my vision, is just to continue to take use in the community, continue to hire staff who are passionate and involved. And also, the staff has been so powerful in shaping our

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foundation and its work. And even just recently, our most recent grant program was sort of internally really shaped heavily by some more junior staff.

So, just that whole process of just getting the other stakeholders in the foundation's work, outside the family, getting their input and letting that be the real big guiding force in the foundation. That's how I think about it. But at the same time, I could set just one vote.

And that's part of the reason I want to engage like, this other fourth generation board member and [inaudible] to truly understand; where's your head at? What do you want out of this? How do you feel about what we do, and how we do it?

And to see, you know, I don't know if there's another angle here, or if he feels the same way I do. Or, maybe they feel like; I'm tired of being placed-based and don't I live in Los Angeles, and you know, all those things come up. So, I just try to listen and see what we can do. So, I don't know, I'm kind of very open to what might happen, for sure.

Ellie: I love it. So, I want to switch topics a little bit, Theo, because I know that the audience is really interested in this idea of sharing values, and like, with the family. And how are values, if they're discussed, like, how are they discussed and shared in your family? And do you have any, things that have really worked?

Theo: I really understand the importance of that. And I imagine, just knowing different families, I imagine that you probably get such different rich answers from different families and people. But you know, it's interesting because our family isn't, compared to what I imagine of some families, our family isn't like super unified.

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You know, I think in some families, it's like, you know, whatever grandpa says goes, and it all comes down from grandpa or something like that. But for us, like, I think, in part, because, for example, that whole thing with my dad sort of having a rift, the rest of the family, it's a bit more fractured.

But it is interesting, because we do find, especially when we get together, that we all share things. We all have a sense of humor. I think nobody, you know, nobody has a temper. Everybody's patient and open. And I feel like the other family members are all really humble, and just want to do a good job.

And you know, you can tie it, you can certainly tie it to our grandfather. And he was kind of a quirky, zany character, and was socially minded throughout his life. And same with my grandmother, whose name imbues the foundation. You know, they were just, I think, very charitably minded and hearted people, who were quirky. And I think that that's really kind of the nature of the foundation now.

So, I think it does help, we did do things, like, I remember early on, we invited my aunt and uncle, who were second generation board members, to talk about the early days, the foundation, and kind of story tell. We had a fireside chat, for example. So, I think of something like that, as one way to kind of connect the past to the present, and hear their stories about the foundation.

And we did also, one wonderful thing that was done was, we did a 50-year retrospective on the foundation. You know, we hired someone who wrote just a 50-year look back on Durfee, and everything that had happened. And the different ways that the programs evolved into kind of this, the whole story of the foundation.

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And you know, you can't tell that story without thinking about the values that drove different decisions. So, I think it was actually really powerful for me. And it's unfortunately not an exercise that I did until recently, you know, probably within the past year, to really sit down and read this, I forget, like 60-page document; first sentence to the last sentence.

And when I did it, it did impact me. You feel like you are a part of this family story, and that there are values that run through it. So, I do think that that, just looking back, looking back at the history of foundation, I think is a powerful way. And just having, you know, either through oral storytelling or through a written document, I think to the extent that you can do that, and just tell a story of the family and the history of the foundation, and of what they've done.

I think then, when you join as a new board member, you feel like you're just the next season, you know, in this show; you're the next chapter in this book. But it also gives you context, and does kind of give you direction. But at the same time, I do think like, our family is really open, in the sense that like, you know, every generation has had its input and its impact on the foundation.

And there's this feeling of like, you don't worship at the altar of what the prior generations have done. And the old generations are looking to the new ones, to change things and to have an impact and to shape things how they see best. So, I think there's also like a letting go, you know.

There isn't a strong feeling of like, I don't know how... I'm sure at some foundation, something like; this is a Christian foundation. And you know, we'll always be involved with the church or something like that. And we don't have any strong guidelines like that.

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I think the older generations are really good at letting go. And I think the new generations have been good at taking cue and you know, taking the baton from the older generations, keeping the work going.

Ellie: I think that's fantastic. Because you're right, that doesn't happen all the time. Especially when you're talking about legacy. You know, so often it's like; oh, we have to do this, because the founder was really passionate about X, Y, and Z.

And by the way, I loved how you use like, zany and quirky when it comes to your philanthropy. I just think that sounds like so much fun. Like, I want to be a part of a foundation that's kind of quirky. Like, I have characters, and a little zany, and does kind of things creatively. And like, what do we want to do? And kind of does it. But that just sounds like, what an amazing history that you have, and kind of legacy that you can now take to, you know, to do some really cool work in the future. Perfect.

I want to ask a question that kind of our group is also interested, especially like, I'm feeling like Gen Xers, and maybe their parents are asking. And that is like this idea of like, how to have discussions around like, wealth and access and privilege. And I know this is not an easy question to answer.

But if you can just kind of think about like, how have you done some of your own work in this space? And now, you're raising a toddler, you're married. Like, maybe how have you had conversations with your significant other? If you have. Like, how have you been having these types of conversations about just like, the privilege that we have of being on the board of a family foundation?

Theo: Boy, I really think it's important, and I mean, it's really been a part of my life from the start. I think that there's always been a culture in my family of kind of a humility about money and our entitlement to it. I think my



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grandfather... You know, he was Stanton Avery. And he invented the adhesive label, that's now the Avery Dennison Corporation™.

And before that, he was just this kind of funny tinkering guy. I mean, he's just doing these weird projects. I think going back to the quiriness and zaniness, you know, if he was... You know, I've heard stories of him building massive yo-yos that he would hang off the tops of buildings and stuff. And, he was just always trying to do these funny things.

And he would, you know, fantasize about inventing something that had economic use, that could sort of free him from the prospect of having to work. Then he ended up, you know, really inventing the modern adhesive label. And I think that there was a sense that he was very, like, very socially minded at that point.

You know, I think I've heard before that he said, like, "I'm the only S&P 500 CEO, that's a Democrat," or something, when he got started. And he and his wife were very, like, just involved with people, and very, I think, compassionate people.

And so, I think that there was a sense, I mean, I can't speak for my grandfather, but I think he perhaps felt kind of like he got lucky. Like, he figured something out. It was kind of this windfall. And also, because he had humble, much more humble beginnings, there was this feeling of like, boy, it's such a fortunate and lucky thing to be in the position we're in.

And I think that that's really stuck with the family. And you know, I think, certainly, there was never like, really any flashiness in my family. I once heard a story, after my dad died, that he was a lawyer, too. And he, in law school, his friends, you know, got together and bought him a new pair of shoes, because they thought he couldn't afford shoes, you know.

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And so, that kind of tells you about how he presented himself. And then he moved us out to a really remote town in Southern California, you know, like a population of 1,600 area, that was very much, not at all had any like meaningful wealth out there. Sort of, they just wanted to get off the grid type thing.

So, I think growing up in that community, and going to the public schools there, for example, is just really apparent. Like, you know, the disparity was really apparent. I think we were just always raised to be super mindful of that. And, you know, growing up, most of my friends didn't have anywhere near the resources that we did.

So, I think it's just always been part of my life, and just realize, you know, we're so blessed, we're so lucky, and we're so privileged. And it really is an incredible privilege to have access to money, and the power that often comes with it. The foundation being an example of that. And I, you know, there's, I mean, there's so many aspects of it, it's just hard to hit them all.

But I think the more you can just get people, I'm thinking of children in that context, but you know, when you're engaging with family members and stuff, the more you can do to just constantly remind yourself of like, the remarkable position you're in to be able to engage in philanthropy. And also, to see it from another angle.

You know, for me, I'll share like, one formative experience I had early on, when I was engaged in the foundation's work was that, you know, as a young attorney, I had very few practical skills coming out of law school. It's funny how you can... You know, I went to a good law school, and did really well in school, and by the end of it, and after passing the bar, I still couldn't tell you how to file a lawsuit. You really don't have any practical skills.

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So, I decided, like, boy, I need more like hands on skills. So, I decided volunteer at a local legal aid, in addition to my professional legal work I was doing. It was just like a dusty little legal aid out in the desert region of Southern California, you know. And it was like, two staff members, and then just several volunteer attorneys, almost all of whom are retired.

And it was a remarkable experience, in the sense that I really learned then. I saw like, wow, like the need so overwhelmed our services. You know, there was just such a thirst for resources. Like we had, most of the cases we handled, for example, were evictions. And just seeing people get evicted over \$50 problems. Just to see lives get turned upside down over \$50 or \$100 problems.

And, you know, it's like everything I dealt with was a money problem. Even if it was a genuine legal problem, the only reason they were engaging us was because they couldn't afford legal services. So, all the volunteers were just always going above and beyond. There was a paralegal who worked there, was one of the staff members, and she had a truck. So, every weekend, she would like spend a weekend helping people we had assisted with evictions move, you know. You'd take her truck and stuff...

And so, just to see, like, it gave me a taste of like, what's going on in the nonprofit world? How dedicated and passionate people are; almost no compensation for it. It just like, man, the need just so overwhelmed the resources.

So, I think that helped shift my mindset about philanthropy, where I fell, I think at first, you know, this is probably a really awful analogy, but I thought of it as something like really gratuitous. Like, you know, you're just like, you're baking cake, and you get to decide who gets cakes. Because this is money that you've decided to give away, and you didn't have to do it.

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And so of course, it's totally up to you who gets cake. But now, I think after that experience, that, you know, I think of the money that's housed in the foundation is more like water, or rice. And you know, we're like in a famine. And it really changes your mindset about your responsibility as a board member, and how you think about it, and how you go about it, and also what it means to be in the position you're in.

Like, you know, I have no illusions that, you know, if the Durfee Foundation existed privately and independently, it's not like, they'd be like; boy, we have a spot open for stewardship here, we really need the fiduciary, let's call Theo Avery. You know, he's the right guy. Like, I'm totally there.

My only qualification is my last name. I absolutely would not be first pick on any draft for a Dream Team fiduciary here. So, I just know, it's a super privilege. I have no entitlement to the money other than happenstance of lineage. And I just know, too, it's so powerful and important, what we do in philanthropy, and it's just wow. You know, it's a real responsibility.

And I think the more perspective you can get on that, the better. And as to how to do that, I think it's just really just engagement. I'm sure you know, it's like wonderful. Like, you told me you live where you are doing the work. I'm sure you get to see firsthand a lot of the impact of the philanthropy that you guys do. And I think just seeing that and appreciating that, just gives you context and really gives you some humility about what you're doing, for sure.

Ellie: 100%. You know, there's actually several similarities on how you and I were raised. Like, I grew up in a town of 4,000, on a farm. And actually, never realized that we had any access to wealth until well into my teens, like probably actually, when I was invited to kind of explore family philanthropy at age 15.

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Like, my house is a little bit bigger, but it was explained because we have, you know, there was five kids plus parents, so. And, you know, it was different when you went to my grandparents, because our wealth was made through insurance and banking; very different from the quirky. I love how you explain your family, like we're like, oh, we love to work.

And I think you said that your grandfather was like, "Yeah, I don't really want to work, I want to invent something. Do some fun things." I don't know if that's actually what you meant, but that's kind of what I envisioned.

Also, I worked in nonprofits. And I think that that is traveling and working in nonprofits as a philanthropist, for me, was incredibly important. So, I lived in Uganda for about six months, right in Kampala, right in the middle-class Ugandan community. And that was a really, really powerful pivot to actually in my like, my mindset. I'm missing the words that I'm looking for.

But like a real transformation. Here was Ellie before, here's Ellie after, right? So, those two things, I would also agree. Like, just getting yourself into really understanding what the community, the disparity that's out there in a real way, and not like a; I'm a tourist.

Theo: Yeah, totally, I think that's a good... I don't know, if you guys have anything at your foundation where, you know, board members get a chance to engage in the work of any nonprofits that you support. But I don't think we have anything formal, but you know, one thing that, like, I know we've done before, you know, if we had a board member who was really interested in certain subject areas, of like, I don't know, like, domestic violence or something, right?

And we supported an organization that does work related to that, we would often, you know, set up an opportunity, perhaps to volunteer. And that perspective, as always, I think, like you said, I think just... I've never seen

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someone go through that experience, if you haven't engaged in nonprofit work before. And even if you have, you know, every organization, every subject area is different.

And I think once you do, it's just like, like you said, it's a transformative experience. Really, I'd encourage... I don't know, you know, there's probably some fantastic ideas of how to get people to engage in that. But it really is powerful experience.

And I think it's a great recommendation for people who feel, especially if they feel like they want people to care about the work that the foundation is doing. I think it's a great way to get that perspective.

Ellie: I think that's fantastic. So, I want to ask one last question, before we wrap up. And that is like, with all your experience and kind of thinking about the future, and kind of, you know, now you've gone to different events and engaged with different organizations, like, for somebody listening to this, who's like; I want to engage my adult kids, and I'm not sure how.

What are some lessons learned, like pitfalls, that they should watch out for? So, you've shared a lot about, like, what has worked for your family. But I'd love to kind of hear like; okay, if you want to engage your adult kids, here are some things to watch out for. And maybe some advice that you might give.

Theo: I just instinctively hesitate giving advice, especially in this realm, just because I know every family's so different, every foundation is so different. And probably, if I were thrust into that role, in any given family, my approach probably might be radically different. But you know, I do feel like, I think it's important...

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You know, some of the stories I've heard from other people is, you know, not feeling valued. You know, I remember speaking to someone who said that the older generation was trying to vote, to strip the younger generation of a vote, you know, voting powers that... You hear stuff like that, you think like; oh, boy, you know, that would not help my engagement on the board.

Ellie: But it's real, it happens.

Theo: Yeah, it totally happens. You know, I think it's probably no different from any other relationship in your life, in the sense that I think it's really important that people feel heard, that they feel valued. But that doesn't, you know, it's obviously it's not all about the other person. You have a foundation with the history and the structure that they're going to be coming into.

So, they also, you know, probably need to, for lack of a better term, yield a little bit, learn some things, learn some ropes. But I do think that, you know, that engagement process, I think, just being very thoughtful about it. I, you know, I'm sure you're really good at this. I'm sure the people you work with are really good at this. But just being very thoughtful about that engagement process, and the different messages you might be sending.

Like, you know, like I mentioned the flexibility aspect, how important that was for me. Just sending that message of; hey, this is an opportunity. We want you here, but no big pressure. Don't freak out. That was helpful for me.

And I think, you know, I remember as an attorney, because I worked in litigation, and, you know, I'd listened to things and read books about whatever trial presentation. And I always remember one attorney talking about how he always wanted the jury to feel like they were part of the story.



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That it wasn't just they presented a story, and the jury decided who was right and who was wrong.

It was like, here's this horrible injustice that happened. And now jury, you write the last chapter of what happens. And I think that, that sticks with me sometimes, because I think of, for example, engaging the next generation. Just getting them to see like, hey, in this grant there's this grand story of our family, of everything we've done. And it all comes to this, you know, in some way, to this focal point of this foundation.

And now, there's a baton being handed to you. And now, you know, you're part of this incredible story. And I think engaging people like that, both excites people because they feel like wow, I'm part of this, you know, epic journey and tale. And it also empowers them, it's like, what you do is very important, who you are is very important. You have a lot of power, you know, with this baton comes a lot of responsibility and a lot of power.

And also, hopefully gets them to pay a little bit of attention to what's come before them, and show some deference and respect, to the extent it's necessary and appropriate. But I think a lot of mutual respect and a lot of openness. And I think you just have to tailor your message to the individuals involved, to the family involved, and just be thoughtful about the process.

And I certainly wouldn't dump it on people like, I feel like I've heard sometimes. It's like, here's this remarkable privilege, you know, you do a good job with it. And you know, if you don't, well, shame on you, or something. I mean, that just doesn't feel inspiring. It feels intimidating, and it probably feels condescending and frustrating, or something. So, I don't know, those are the thoughts that come to my mind.

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Ellie: No, those are so fantastic. I want to... I lied; I have one more question. Maybe you've already hinted on it before. But when you were talking, and I've started, do this work myself, it reminds me that we are coming at this from a place of like, how to engage your kids.

But there's also a responsibility, as you've already hinted of the quote unquote, "kids". Can you talk a little bit about that responsibility? And maybe like, what responsibility would you share? Like, kind of, with your fourth generation? What would you tell your fourth generation about the responsibility, like their responsibility, and how to step in to this amazing work that we do?

Theo: You know, I'd probably be very subtle, in the sense that I tend to do this, in my own experience, not to get very much traction, just telling people what to do, and what their responsibilities are. But I think I would share, if I were speaking... And not to the parent of someone trying to engage a child, instead of a child that was either trying to engage themselves or be engaged.

You know, I think I would just be... Because I feel like the frustration on the other side, you know, I know the frustration on the kid's side is often like, I feel like; they don't value my input, or, you know, my recommendations get shut down, or it's just like, the old structure is so old and stuffy, and they've got their issue ideas, I just don't feel there's a place for me.

I feel like on that flip side of that, from the parents' perspective, and what's I think important for sort of the child or the next generation to understand, is like, you know, there's just been a lot that's come before you. And a lot of the way that things work, are the function of kind of like very difficult to change, if not impossible, either family dynamics, or, you know, just really difficult hard-fought decisions that have been made in the foundation. A lot of the time about what the mission is, that sort of thing.

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And I'm not saying that stuff can't change, I think it's good for the next generation of board members, regardless whether they're family members or not, to come in with an eye of looking for opportunities to change. Of like, hey, you know, I am a fresh eye on this, what do I see? What might I contribute here? But I think just having some deference of like; look, you do have to come into this process with some humility. Like, there's a lot that's usually happened before you.

And there's some very deep roots to it, you know, there's family dynamics. There's just a long history of the foundation. Sometimes, you know, when your foundation has been doing work for a long time, like, as probably you've experienced in your foundation, you're really rooted in the community, and the community has hopes and expectations for you.

So, I think just coming in and just saying, you know, just impressing upon people of like; you really need to investigate what the history is here, and what the roots are, in terms of like, who are the stakeholders? How did these things come to be the way they are? Why are things being done this way?

And so, that means you need to ask questions, and you need to listen, and you need to investigate to get those answers. And like I said, it was transformative for me, when I finally took the time to do things like read about our history. And we've been trying to figure out more, like, okay, for the next generation, you know, it's easy to just throw a 70-page thing on somebody and say, read it.

But how do you really meaningfully engage people and get them to hear that story and appreciate where we are today? And, what's come before? So, I guess my advice ,on the flip side of it, it's like you really have to have humility. And I think it's easy to assume that the way things are is just

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arbitrary. And people just crudely decided it and didn't give much thought to it.

But often there's a big backstory there, and a lot of forces, and sometimes a lot of really good decision making and thoughtfulness that underlies the way things are. So, you just have to try and figure out why things are the way they are, before you venture in and totally shake them up, or ignore them.

Ellie: You know Avery, that was amazing. I learned actually, so much from you. And I love the idea of realizing that you're a part of something bigger, and that there is a reason why to understand the context and the backstory. So, I really appreciate your time and sharing your amazing story with us, today. Is there anything that I missed asking you, that you want to share?

Theo: I, you know, it's hard for me to have to just answer questions. Like, I can tell you 1,000 times, I just wanted to flip the question on you. And I hope we can continue this conversation offline, and see each other at the forum. Because I know too... I got the chance to dig around a little bit about your foundation, about the work you do outside the foundation. And boy, I'm just really curious. I really want to know your answer to some of these questions, too. So, I hope the conversation can keep going outside of this.

Ellie: Oh, 100%. It totally will. I'm super excited to see you at the forum, in October, and I really appreciate you taking the time today.

Theo: All right. Thank you so much. Thanks, Ellie.

Well, there you have it. Thank you so much for listening to *The Family Business Leader Podcast*. If you've enjoyed today's episode, be sure to share it with someone who needs it. If you'd like more information about family business leadership development, please visit

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[successfulgenerations.com](https://www.successfulgenerations.com). I can't wait to connect with you again next week, until then.