

**ARTIST-ENDOWED
FOUNDATIONS
INITIATIVE**

PHILANTHROPY & SOCIAL INNOVATION
 aspen institute

SEMINAR ON STRATEGY
for **ARTIST-ENDOWED
FOUNDATION LEADERS**

2023

**ARTIST-ENDOWED
FOUNDATIONS
INITIATIVE**
PHILANTHROPY & SOCIAL INNOVATION
aspen institute

SEMINAR ON STRATEGY *for* ARTIST-ENDOWED FOUNDATION LEADERS

March 7 – May 24, 2023

—
SUPPORTING THE PROFESSIONAL DEVELOPMENT
OF FOUNDATION LEADERS &
STRENGTHENING THE CHARITABLE IMPACT OF THE EMERGING
ARTIST-ENDOWED FOUNDATION FIELD IN
CULTURAL PHILANTHROPY AND ART STEWARDSHIP

—
HOSTED BY
500 CAPP STREET FOUNDATION | DAVID IRELAND HOUSE
THE JOSEF AND ANNI ALBERS FOUNDATION
ELLIS-BEAUREGARD FOUNDATION
THE GORDON PARKS FOUNDATION
WOODMAN FAMILY FOUNDATION



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SEMINAR ON STRATEGY FOR ARTIST-ENDOWED FOUNDATION LEADERS

THANK YOU

On behalf of the Aspen Institute Artist-Endowed Foundations Initiative | AEFI and our Aspen Institute colleagues, I am pleased to extend a warm thanks for the support that has made possible the 2023 Seminar on Strategy for Artist-Endowed Foundation Leaders.

We thank the host foundations that have generously opened their facilities and programs to engage with the foundation leaders participating in the Seminar:

500 CAPP STREET FOUNDATION | DAVID IRELAND HOUSE
THE JOSEF AND ANNI ALBERS FOUNDATION
ELLIS-BEAUREGARD FOUNDATION
THE GORDON PARKS FOUNDATION
WOODMAN FAMILY FOUNDATION

We also thank the many foundation leaders, scholars, and practice experts, all listed in the following pages, who have made themselves available to share their expertise during the Seminar.

We offer our gratitude to the AEFI Lead Underwriters—Artists Rights Society | ARS, Risk Strategies, and UOVO. They are essential partners who provide core support to sustain AEFI and also share their intellectual capital by collaborating in the development and dissemination of educational information to assist the artist-endowed foundation field.



We thank the AEFI Donor Consortium, led by The Jay DeFeo Foundation, Roy Lichtenstein Foundation, and The Andy Warhol Foundation for the Visual Arts, which has enabled realization of AEFI's groundbreaking research as the basis of the Seminar curriculum. We also thank our AEFI Advisors, led by Leah Levy, Honorary Chair, AEFI Advisors and Executive Director, The Jay DeFeo Foundation, whose wise perspectives inform AEFI's programs and aspirations.

Lastly, we welcome the participants in the 2023 Seminar on Strategy for AEF Leaders and recognize them as leaders of the next generation of artist-endowed foundations.

A handwritten signature in black ink that reads "Christine J. Vincent".

Christine J. Vincent
AEFI Project Director
Seminar Director

2023 SEMINAR DATES - ALL SEMINAR ACTIVITIES TAKE PLACE ONLINE

Opening Reception: Tuesday, March 7

Opening Class: Wednesday, March 8

Course Sessions: Weekly on Wednesdays March 8 - 24, except Tuesday, April 11

Closing Class: Wednesday, May 24

Closing Celebration: Wednesday, May 24

2023 SEMINAR SCHEDULE OVERVIEW

Tuesday, March 7

5:00 – 6:30 PM ET

Opening Reception

Introductions: Participants, AEF Hosts, AEFI Advisors & AEFI Lead Underwriters

Wednesday, March 8

1:00 – 3:00 PM ET

Participant Check-in and Introductions
Seminar Opening Class

Wednesday, March 15

1:00 – 5:15 PM ET

Site Visit #1: The Josef and Anni Albers Foundation

1. Legacy Stewardship and Artist-Endowed Foundations

Session 1.1 Foundation Basics

Session 1.2 Public Benefit

Wednesday, March 22

1:00 – 5:30 PM ET

Session 1.3 Fiduciary Duties

Session 1.4. Foundations and Individuals

Crosscutting Conversation: Foundation and Family

Module Review: Recap/Reflect

Wednesday, March 29

1:00 – 5:15 PM ET

Site Visit #2: The Gordon Parks Foundation

2. Organizational Viability

Session 2.1 Governance

Session 2.2 Starting Up/Reorganizing

Wednesday, April 5

1:00 – 5:30 PM ET

Session 2.3 Art Market Strategy

Session 2.4 Business Model

Crosscutting Conversation: Long-term Stewardship Planning

Module Review: Recap/Reflect

2023 SEMINAR SCHEDULE OVERVIEW, CONTINUED

Tuesday, April 11
1:00 – 5:15 PM ET

Site Visit #3: Ellis-Beauregard Foundation
3. Cultural Asset Stewardship
Session 3.1 Art Collections
Session 3.2 Archives

Wednesday, April 19
1:00 – 5:30 PM ET

Session 3.3 Oeuvre Scholarship
Session 3.4 Intellectual Property
Crosscutting Conversation: Oeuvre Management
Module Review: Recap/Reflect

Wednesday, April 26
1:00 – 5:15 PM ET

Site Visit #4: Woodman Family Foundation
4. Philanthropic Impact
Session 4.1 Grantmaking
Session 4.2 Support to Individuals

Wednesday, May 3
1:00 – 5:30 PM ET

Session 4.3 Museum Gifts and Charitable Sales
Session 4.4 Educational and Public Programs
Crosscutting Conversation: Foundation Termination
Module Review: Recap/Reflect

Wednesday, May 10
1:00 – 5:15 PM ET

Site Visit #5: 500 Capp Street Foundation | David Ireland House
5. Foundation Operations
Session 5.1 Professional Advisors
Session 5.2 Risk Management

Wednesday, May 17
1:00 – 5:30 PM ET

Session 5.3 Digital Engagement
Session 5.4 Foundation Planning
Crosscutting Conversation: Diversity, Equity, Access, Inclusion | DEAI
Module Review: Recap/Reflect

Wednesday, May 24
1:00 – 3:00 PM ET

Seminar Closing Class
Course Review: Recap/Reflect/Acknowledgements

5:00 – 6:30 PM ET

Seminar Closing Celebration & Alumni Reunion
Introductions, Recognitions, Reconnections: Participants,
AEF Hosts, AEFI Advisors, Seminar Alumni, AEFI Lead
Underwriters

2023 SEMINAR ON STRATEGY FOR ARTIST-ENDOWED FOUNDATION LEADERS

MODULE	WEEK	DATE	DAY	1:00 to 2:15 PM EST	2:30 to 3:45 PM EST	4:00 to 5:15 PM EST/5:30 PM EST
Course Start-up	0	7-Mar	TUES	1:00 to 3:00 PM EST		Opening Reception 5:00 to 6:30 PM EST
	1	8-Mar	WEDS	Opening Class		
Legacy Stewardship	2	15-Mar	WEDS	Site Visit #1: The Josef & Anni Albers Foundation	Foundation Basics	Public Benefit
	3	22-Mar	WEDS	Fiduciary Duties	Foundations & Individuals	Foundation & Family Module Review
Organizational Viability	4	29-Mar	WEDS	Site Visit #2: The Gordon Parks Foundation	Governance	Starting Up/Re-Organizing
	5	5-Apr	WEDS	Art Market Strategy	Business Model	Stewardship Planning Module Review
Cultural Asset Stewardship	6	11-Apr	TUES	Site Visit #3: Ellis-Beauregard Foundation	Art Collections	Archives
	7	19-Apr	WEDS	Oeuvre Scholarship	Intellectual Property	Oeuvre Management Module Review
Philanthropic Impact	8	26-Apr	WEDS	Site Visit #4: Woodman Family Foundation	Grantmaking	Support to Individuals
	9	3-May	WEDS	Museums Gifts/Sales	Educational/Public Programs	Diversity/Equity/Access/Inclusion Module Review
Foundation Operations	10	10-May	WEDS	Site Visit #5: 500 Capp Street Foundation David Ireland	Professional Advisors	Risk Management
	11	17-May	WEDS	Digital Engagement	Foundation Planning	Foundation Termination Module Review
Course Conclusion	12	24-May	WEDS	Closing Class 1:00 to 3:00 PM EST		Closing Celebration 5:00 to 6:30 PM EST

AEF Hosts: 500 Capp Street Foundation | David Ireland House • The Josef and Annie Albers Foundation • Ellis-Beauregard Foundation • The Gordon Parks Foundation • Woodman Family Foundation

The Aspen Institute Artist-Endowed Foundations Initiative | AEFI

2023 SEMINAR SCHEDULE DETAIL

Tuesday, March 7
5:00 – 6:30 PM ET

Opening Reception

Welcome, Introductions, and Socializing

Seminar Participants

AEF Hosts

AEFI Advisors

AEFI Lead Underwriters

AEFI Donors

Seminar Team

Welcome

Leah Levy, Honorary Chair, AEFI Advisors
Executive Director, The Jay DeFeo Foundation

Christine J. Vincent, Project Director Artist-Endowed Foundations Initiative | AEFI
The Aspen Institute

Wednesday, May 8
1:00 – 3:00 PM ET

Course Start-Up

Seminar Opening Class

What is the Seminar's mission and philosophy?

What are the Seminar's intended outcomes? The logic of its curriculum?

How will the Seminar operate? What is expected of participants?

Christine J. Vincent, Seminar Director

Participant Engagement

What goals, ambitions, and expectations does each Participant bring to the Seminar?

How will Participants engage throughout the Seminar?

Seminar Participants

Andria Bibiloni, Moderator

Board Member, von Rydingsvard and Greengard Foundation
Seminar 2016, 2017

Wednesday, March 15

1:00 – 5:15 PM ET

1:00 – 2:15 PM ET

Site Visit: The Josef and Anni Albers Foundation
Nicholas Fox Weber, Executive Director
Brenda Danilowitz, Chief Curator
www.albersfoundation.org

I. Legacy Stewardship and Artist-Endowed Foundations

Goal: Examine what it means to undertake stewardship of an artist's creative and philanthropic legacy using a tax-exempt, charitable organizational form.

2:30 – 3:45 PM ET

Session I.1 Foundation Basics

*What are the various legal forms and tax statuses used for AEFs?
What considerations come to bear when they are used?*

- Tax-Exempt Sector, Including Tax-Exempt Charitable Entities
- Types of Tax-Exempt Charitable Entities
- Formation Process and Requirements
- Rules for Private Foundations and Public Charities
- Small-Group Exercise: Options for Posthumous Legacy Stewardship
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Kimberly Eney

Vice Chair, Exempt Organizations Committee, American Bar Association
Partner, Morgan Lewis

4:00 – 5:15 PM ET

Session I.2 Public Benefit

*What is the Public Benefit requirement for tax-exemption?
How does the Public Benefit imperative shape an AEFs' legacy stewardship concerns?*

- Public Benefit Requirement
- Charitable Purposes
- Permitted Beneficiaries
- Small-Group Exercise: Charitable Purposes, Activities, Beneficiaries

- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Nishka Chandrasoma

Member, Exempt Organizations Committee, American Bar Association
Vice President, Chief Legal Officer, Secretary, Ford Foundation

Wednesday, March 22

1:00 – 5:30 PM ET

Legacy Stewardship and Artist-Endowed Foundations, Continued

1:00 – 2:15 PM

Session 1.3 Fiduciary Duties

What are Fiduciary Duties and their ramifications?

What influences do Fiduciary Duties have on AEF leaders?

- Fiduciary Duties of Charitable Boards
- Duty of Care
- Duty of Loyalty and Conflict of Interest
- Duty of Obedience (New York)
- Small Group Exercise: Fiduciary Duty Scenarios
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Jill Horwitz

AEFI Advisor, David Sanders Professor of Law and Medicine and Faculty Director,
Program on Philanthropy and Nonprofits, UCA School of Law
Reporter, Restatement of the Law, Charitable Nonprofit Organizations, American Law Institute

2:30 – 3:45 PM ET

Session 1.4. Foundations and Individuals

What is Private Benefit? Inurement? Conflict of Interest and Self-Dealing?

What are the ramifications of these acts?

Where are the risks they represent likely to arise in the context of AEFs?

- Private Benefit
- Inurement
- Self-Dealing
- Conflict of Interest Policies Addressing Self-Dealing
- Small Group Exercise: Disqualified Persons

- Selecting and Using Counsel Effectively
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Stefanie Roth

Member, Exempt Organizations Committee, American Bar Association
Partner, Ewenstein & Roth LLP

4:00 – 5:15 PM ET

Crosscutting Conversation: Foundation and Family
Learning From a Foundation and Family Experience

Conversation Guest

Jack Cowart

Executive Director
Roy Lichtenstein Foundation

5:15 – 5:30 PM ET

Module Review
Recap/Reflect
Open Questions on the Legacy Stewardship and AEFs Curriculum?
Major Take-Aways?

Christine J. Vincent, Moderator

Wednesday, March 29

1:00 – 5:15 PM ET

1:00 – 2:15 PM ET

Site Visit: The Gordon Parks Foundation
Peter W. Kunhardt, Jr., Executive Director
Michael Raz-Russo, Programs Director

2. Organizational Viability

Goal: Understand key elements that contribute to a viable AEF: governance, structure, art market strategy, and business model.

2:30 – 3:45 PM ET

Session 2.1 Governance

How can a governing body be developed to ensure realization of an AEF's legacy stewardship and public benefit imperatives?

- Rules and Imperatives and the Governing Body
- Leadership Perspective: Graham Foundation for Advanced Studies in the Fine Arts

- Nonprofit Governance Basics: Board Role and Structure
- Small Group Exercise: Board Capacities Assessment
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Sarah Herda

Executive Director

Graham Foundation for Advanced Studies in the Fine Arts (Ernest R. Graham)

Gayle Binney

Adjunct Associate Professor, Robert F. Wagner Graduate School of Public Service, New York University

Manager, Board Relations, TIAA

4:00 – 5:15 PM ET

Session 2.2 Starting Up/Reorganizing

What factors inform an AEF's post-bequest start-up or reorganization?

- Post-Bequest Transformation
- The Estate Administration Process
- Leadership Insights: Surf Point Foundation
- Leadership Insights: Adolph and Esther Gottlieb Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Caryn Young

Vice Chair, Estate & Trust Administration Committee, New York State Bar Association

Partner, Withersworldwide

Yael Reinharz

Executive Director

Surf Point Foundation (Beverly Hallam)

Seminar 2018

Sanford Hirsch

Executive Director

Adolph and Esther Gottlieb Foundation

Wednesday, April 5

1:00 – 5:30 PM ET

Organizational Viability, Continued

1:00 – 2:15 PM ET

Session 2.3 Art Market Strategy

What strategies can AEFs use in generating income from art sales?

What are the associated considerations—What, When, How to Sell?

- Art Sales and Artist-Endowed Foundations
- Duty of Care and Consignment Sales
- Art Market Strategy
- Leadership Insights: Dedalus Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Amelia K. Brankov

Chair, Art Law Committee, New York City Bar Association

Principal, Brankov PLLC

Megan Fox Kelly

President, Association of Professional Art Advisors

Principal, Megan Fox Kelly Art Advisory

Morgan Spangle

Executive Director

Dedalus Foundation (Robert Motherwell)

2:30 – 3:45 PM ET

Session 2.4 Business Model

What are the components of an effective AEF business plan?

How can an AEF build the financial capacity to realize its charitable mission?

- Economic Models of AEFs
- Nonprofit Business Models and Liquidity Strategies
- Selecting and Using an Investment Advisor Effectively
- Leadership Insights: Joan Mitchell Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Chaya Scott

Vice President, Consulting

Nonprofit Finance Fund

Jerrold Charles

Director, Business Development
The Investment Fund for Foundations | TIFF

Sandy S. Lee

Board President
Joan Mitchell Foundation

4:00 – 5:15 PM ET

Crosscutting Conversation: Long-term Stewardship Planning
Considering Key Elements in Art Stewardship Planning

Conversation Guests

Stephen K. Urice

AEFI Advisor and Professor of Law, University of Miami School of Law
Editor, *Law, Ethics and the Visual Arts*, 6th Ed, Cambridge University Press

Victoria Woodhull

Director, Kenneth Noland Foundation
Seminar 2016, 2017

5:15 – 5:30 PM ET

Recap/Reflect
Module Review
Recap/Reflect
Open Questions on the Organizational Viability Curriculum?
Major Take-Aways?

Christine J. Vincent, Moderator

Tuesday, April 11

1:00 – 5:15 PM ET

1:00 – 2:15 PM ET

Site Visit: Ellis-Beauregard Foundation ((David Ellis, Joan Beauregard)
Donna McNeill, Executive Director
Seminar 2018
www.ellis-beauregardfoundation.org

3. Cultural Asset Stewardship

Goal: Explore the considerations in fulfilling an AEF's charitable purpose to increase the public's access to and knowledge about the creative work of its artist.

2:30 – 3:45 PM ET

Session 3.1 Art Collections
How can a foundation optimize the public benefit of its art collection and fulfill its legacy stewardship imperative?

- Challenges in Initiating Collection Stewardship
- Leadership Insights: Emily Mason | Alice Trumbull Mason Foundation
- Leadership Insights: Mike Kelley Foundation for the Arts
- Leadership Insights: Noah Purifoy Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Mari Carmen Ramirez, Moderator

AEFI Advisor and Wortham Curator in Latin American Art
The Museum of Fine Arts, Houston

April A. Johnson

Director of Business Development
UOVO (AEFI Lead Underwriter)

Steven Rose

President/Executive Director
Emily Mason | Alice Trumbull Mason Foundation
Seminar 2020

Mary Clare Stevens

Executive Director
Mike Kelley Foundation for the Arts
Seminar 2016

Joseph S. Lewis, III

President
Noah Purifoy Foundation

4:00 – 5:15 PM ET

Session 3.2 Archives

*What are an AEF's responsibilities in archive ownership?
How can an archive's public benefit be optimized?*

- Centrality of Access in Archival Stewardship
- Challenges in Initiating Archive Stewardship
- Leadership Insights: Richard Poussette-Dart Foundation
- Leadership Insights: Roy Lichtenstein Foundation
- Leadership Insights: Robert Rauschenberg Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Ann E. Butler, Moderator

Director, Library and Archives, Center for Curatorial Studies
Bard College

Charles Duncan
Executive Director
Richard Pousette-Dart Foundation
Seminar 2016

Francine Snyder
Director of Archives
Robert Rauschenberg Foundation

Justin Brancato
Head of Archives and Associate Director
Roy Lichtenstein Foundation
Seminar 2016

Wednesday, April 19
1:00 – 5:30PM ET

Cultural Asset Stewardship, Continued

1:00 – 2:15 PM ET

Session 3.3 Oeuvre Scholarship

What factors influence an AEF's involvement in and approach to different types of oeuvre scholarship initiatives?

- Oeuvre Scholarship: Catalogues Raisonnés, Oral History, Conservation Research, Collection Research
- Leadership Insights: Dedalus Foundation (Robert Motherwell)
- Leadership Insights: Sam Francis Foundation
- Leadership Insights: Holt-Smith Foundation (Nancy Holt, Robert Smithson)
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Steven Nelson, Moderator
Dean, Center for Advanced Study in the Visual Arts
National Gallery of Art

Katy Rogers

Vice President/Secretary and Programs Director
Dedalus Foundation
Director, Robert Motherwell Catalogue Raisonné

Debra Burchett-Lere

President/Executive Director
Sam Francis Foundation
Director, Sam Francis Catalogue Raisonné

Lisa Le Feuvre

Executive Director

Holt-Smithson Foundation (Nancy Holt, Robert Smithson)

Seminar 2018

2:30 – 3:45 PM ET

Session 3.4 Intellectual Property

How can an AEF optimize the public benefit of its IP assets and deploy them to fulfill the legacy stewardship imperative?

How do AEFs balance noncommercial and commercial use of their IP assets?

- For the Purpose of an AEF: What is Intellectual Property?
- What is Fair Use?
- Leadership Insights: The Andy Warhol Foundation for the Visual Arts
- Leadership Insights: Keith Haring Foundation
- IP Licensing Basics
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Bhamati Viswanathan, Moderator

Chair, New England Chapter, Copyright Society of the USA

Faculty Fellow, New England Law

Michael Dayton Hermann

Director of Licensing, Marketing, and Sales

The Andy Warhol Foundation for the Visual Arts

Gilbert Vazquez

Executive Director,

Keith Haring Foundation

Janet Hicks

Vice President and Director of Licensing

Artists Rights Society/ARS

(AEFI Lead Underwriter)

4:00 – 5:15 PM ET

Crosscutting Conversation: Oeuvre Management

Drilling down on oeuvre management strategies

Conversation Guests

Leah Levy

Executive Director

The Jay DeFeo Foundation

Bloum Cardenas

Co-Trustee

Niki Charitable Art Foundation (Niki de Saint Phalle)

5:15 – 5:30 PM ET

Recap/Reflect

Module Review

Recap/Reflect

Open Questions on the Cultural Asset Stewardship Curriculum?

Major Take-Aways?

Christine J. Vincent, Moderator

Wednesday, April 26

1:00 – 5:15 PM ET

1:00 – 2:15 PM ET

Site Visit: Woodman Family Foundation (Betty Woodman, Francesca Woodman, George Woodman)

Lissa McClure, Executive Director

Seminar 2019

woodmanfoundation.org

4. Philanthropic Impact

Goal: Consider the full range of strategies available to optimize an AEF's philanthropic impact in service to its artist's charitable intentions.

2:30 – 3:45 PM ET

Session 4.1 Grantmaking

How does an AEF determine the goals, scale, and structure of its grant program?

- The Variety of Philanthropic Interests Among AEFs
- Leadership Insights: Helen Frankenthaler Foundation
- Leadership Insights: The Destina Foundation/The Dorothea Tanning Foundation
- Leadership Insights: The Andy Warhol Foundation for the Visual Arts
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Elizabeth Glassman, Moderator

AEFI Advisor and President Emerita, Terra Foundation for American Art

Elizabeth Smith

Executive Director

Helen Frankenthaler Foundation

Pamela Johnson

President/Executive Director

The Destina Foundation/The Dorothea Tanning Foundation

Rachel Bers

Program Director

The Andy Warhol Foundation for the Visual Arts

4:00 – 5:15 PM ET

Session 4.2 Support to Individuals

What are an AEF's options in providing support to individual artists and scholars?

What are the considerations in making direct grants or operating a residency program?

- Approaches to Individual Support; Legal Requirements for Grants to Individuals
- Leadership Insights: Nancy Graves Foundation
- Leadership Insights: Harpo Foundation
- Leadership Insights: Jentel Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Luther Hughes, Moderator

Program Co-Director

Artist Trust

Christina Hunter

Executive Director

Nancy Graves Foundation

Julie Deamer

Executive Director

Harpo Foundation (Ed Levine)

Seminar 2020

Mary Jane Edwards

Executive Director

Jentel Foundation (Neltje)

Wednesday, May 3

1:00 – 5:30 PM ET

Philanthropic Impact, Continued

1:00 – 2:15 PM ET

Session 4.3 Museum Gifts and Charitable Sales

What are an AEF's goals and options for museum gifts and charitable sales of art?

What roles can these play in a broader oeuvre stewardship strategy?

- AEF Involvement in Museum Gifts and Charitable Sales
- Leadership Insights: Ashley Bryan Center
- Leadership Insights: Emilio Sanchez Foundation
- Leadership Insights: Lenore Tawney Foundation

- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

H. Nicholas B. Clark

Executive Director
Ashley Bryan Center

Ann Koll

Former Executive Director
Emilio Sanchez Foundation

Kathleen Mangan

Executive Director
Lenore Tawney Foundation

2:30 – 3:45 PM ET

Session 4.4 Educational Programs

How do AEFs achieve philanthropic impact by conducting educational programs?

What are the considerations in partnering with K-12 and higher education institutions? In conducting an internship program?

- AEFs as Educational Resources and Collaborators
- Leadership Insights: AI Held Foundation
- Leadership Insights: Romare Bearden Foundation
- Leadership Insights: Renee and Chaim Gross Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Alexsandra Mitchell, Moderator

Manager, Education and Public Programs
California African American Museum

Daniel Belasco

Executive Director
AI Held Foundation

Diedra Harris-Kelley

Co-Director
Romare Bearden Foundation

Sasha Davis

Executive Director
Renee and Chaim Gross Foundation
Seminar 2018

4:00 – 5:15 PM ET

Crosscutting Conversation: AEFs and Diversity, Equity, Access, Inclusion

What role does effective DEAI practice play in sustaining the relevancy of an AEF's artist?

What role does it play in optimizing the impact of grants and direct charitable activities?

Conversation Guests

Myron Beasley

Board Member

Surf Point Foundation (Beverly Hallam)

Seminar 2020

Christa Blatchford

Executive Director

Joan Mitchell Foundation

Nellie Scott

Executive Director

Corita Art Center (Corita Kent)

Seminar 2020

Joseph S. Lewis, III

President

Noah Purifoy Foundation

5:15 – 5:30 PM ET

Recap/Reflect

Module Review

Recap/Reflect

Open Questions on Philanthropic Impact Curriculum?

Major Take-Aways?

Christine J. Vincent, Moderator

Wednesday, May 10

1:00 – 5:15 PM EST

1:00 – 2:15 PM ET

Site Visit: 500 Capp Street | David Ireland House

Cait Molloy, Executive Director

Lian Ladia, Curator, Exhibitions and Programs

500cappstreet.org

5. Foundation Operations

Goal: Identify considerations in key dimensions of foundation operations: working with professional advisors, managing risk, using digital engagement strategies, and conducting institutional planning.

2:30 – 3:45 PM ET

Session 5.1 Professional Advisors

*How can AEF Leaders select and use professional advisors effectively?
What special considerations apply to these relationships?*

- Professional Advisors and the Post-Bequest Transition
- Attorneys
- Art Dealers
- Accountants
- Consultants Generally
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Linda Earle, Moderator

AEFI Advisor and Professor of Practice, Fine Arts Management, ret.
Tyler School of Art and Architecture

Christine J. Vincent, Seminar Director

Ruth Masterson

Principal

Masterson Consulting, Nonprofit and Philanthropy Advisors

4:00 – 5:15 PM ET

Session 5.2 Risk Management

*What risks do artist-endowed foundations face in pursuing their charitable missions?
How do AEF leaders manage risk across all dimensions of their organizations?*

- Leadership Insights: Robert Rauschenberg Foundation
- Risk Management Basics
- Art Asset Risks
- Cyber Security Risks
- Employment-Related Risks
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Linda Earle, Moderator

AEFI Advisor and Professor of Practice, Fine Arts Management, ret.
Tyler School of Art and Architecture

Sharon Ullman

Former Deputy Director

Robert Rauschenberg Foundation

Mary Pontillo

Senior Vice President, National Fine Art Practice Leader
Risk Strategies (AEFI Lead Underwriter)

Jesse Pardo

Vice President, Commercial Lines Team Leader
Risk Strategies (AEFI Lead Underwriter)

Wednesday, May 17

1:00 – 5:30 PM EST

Foundation Operations, Continued

1:00 – 2:15 PM ET

Session 5.3 Digital Engagement

What considerations should be weighed in developing digital strategies to stimulate public engagement with an AEFs' cultural assets and knowledge resources?

What take-aways can be garnered from such efforts?

- Leadership Insights: Dedalus Foundation (Robert Motherwell)
- Leadership Insights: Richard Diebenkorn Foundation
- Leadership Insights: Museo Eduardo Carrillo
- Leadership Insights: Joan Mitchell Foundation
- Principles of Digital Engagement
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Jane Finnis, Moderator
CEO, Culture/24

Julia Norman

Digital Communications Coordinator
Dedalus Foundation (Robert Motherwell)

Katherine James

Head of Digital and Public Engagement
Richard Diebenkorn Foundation

Betsy Andersen

Executive Director
Museo Eduardo Carrillo

Melissa Dean

Design and Media Manager
Joan Mitchell Foundation

2:30 – 3:45 PM ET

Session 5.4 Foundation Planning

What approaches have AEF leaders used in undertaking planning to set their foundation's strategic directions?

What lessons have been learned in this work?

- Leadership Insights: Judd Foundation (Donald Judd)
- Leadership Insights: Isamu Noguchi Foundation and Garden Museum
- Options and Strategies for Institutional Planning
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Richard Griggs

Chief Operating Officer

Judd Foundation

(Donald Judd)

Brett Littman

Director

The Isamu Noguchi Foundation and Garden Museum

Jennifer Dowley

AEFI Advisor and Former President

Berkshire Taconic Community Foundation

Seminar 2017

4:00 – 5:15 PM ET

Crosscutting Conversation: Foundation Termination

Strategizing, preparing, and implementing foundation termination

Conversation Guests

Marilyn Loesberg

Former President

Clinton Hill-Allen Tran Foundation

Lawrence S. Taub

Former President

Mandelman-Ribak Foundation (Beatrice Mandelman, Louis Ribak)

5:00 – 5:15 PM ET

Recap/Reflect

Module Review

Recap/Reflect

Open Questions on Foundation Operations Curriculum? Major Take-Aways?

Christine J. Vincent, Moderator

Wednesday, May 24

1:00 – 3:00 PM ET and 5:00 – 6:30 PM ET

Course Conclusion

1:00 – 3:00 PM ET

Seminar Closing Class

Recap/Reflect, Collegial Recognitions

The Way Forward, Key Ideas and Takeaways

Andria Bibiloni, Moderator

Board Member, von Rydingsvard and Greengard Foundation

Seminar 2016, 2017

Christine J. Vincent, Seminar Director

Seminar Participants

5:00 – 6:30 PM ET

Seminar Closing Celebration & Fifth Anniversary Salute

Certificate Presentations, Introductions

Reconnections, Networking

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AEF Hosts

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The Aspen Institute

MARCH 7 – MAY 24, 2023

SEMINAR PARTICIPANT GUIDELINES

The **SEMINAR ON STRATEGY FOR ARTIST-ENDOWED FOUNDATION LEADERS**, presented by the Aspen Institute Artist-Endowed Foundations Initiative | AEFI, supports the professional development of individuals who currently have, or will have, policy-setting and leadership responsibilities for artist-endowed foundations—directors, officers, trustees, board members, and senior staff—as well as those supporting an artist’s long-term art stewardship planning with respect to a potential foundation.

The Seminar curriculum is based on findings of AEFI’s National Study of Artist-Endowed Foundations and subsequent research publications, viewable at www.aspeninstitute.org/aefi. It focuses specifically on the strategic concerns of leaders orienting themselves to the field. By building the capacity of foundation leaders, the Seminar advances AEFI’s mission to strengthen the charitable impact of the emerging artist-endowed foundation field. The following participant guidelines support that mission. ***In applying to participate in the Seminar, all applicants agree to comply with the participant guidelines presented here.***

Educational Acknowledgement

All AEFI programs, including the Seminar, are strictly educational and informational in nature and do not purport to provide legal advice or professional guidance to particular individuals, organizations, or situations. ***Seminar participants acknowledge that the Seminar and the institutions, practitioners, and scholars serving as hosts, panelists, and speakers, are providing educational and informational content exclusively and are not providing legal advice or professional guidance, and that Seminar participants are responsible for securing the necessary qualified legal and professional advice required specifically by themselves and their organizations.***

Full Participation

The Seminar’s goal is that participants will use this opportunity to build their knowledge about artist-endowed foundations broadly, so that in addition to achieving success in their particular leadership positions, they also will be able to play a productive role in the artist-endowed foundation field at large, for example as board members, advisory committee members, etc. ***Attendance at, and full participation in, all Seminar sessions and events, which is necessary to develop this broad knowledge, is required of all participants. Selective attendance is not permitted.***

Code of Conduct

- Collegial Respect: All participants in the Seminar on Strategy for AEF Leaders will conduct themselves in a respectful and professional manner, bringing credit to their organization and to the Seminar and its presenters, cooperating partners, hosts, and sponsors. **AEFI is dedicated to providing a safe and welcoming Seminar experience for all participants, regardless of race, gender, gender identity and expression, age, sexual orientation, disability, physical appearance, national origin, ethnicity, or religion.**
- Confidentiality: **To ensure the type of frank commentary that is essential for collegial learning, all presentations and discussions occurring during the Seminar are confidential, unless specifically indicated otherwise. If there is doubt on this point, participants are obliged to ask for clarification.**
- Non-Solicitation: The Seminar is a non-solicitation environment. **Fundraising and business solicitation are not permitted.**
- Social Media
The Seminar is a private event. **For the security purposes of the hosting foundations, and the confidentiality of participants, any filming, recording, blogging, tweeting, or posting from the Seminar is prohibited.**
- Expectations for Community Engagement
The Aspen Institute's Community Agreement, setting out expectations for individuals participating in its programs, are detailed here and should be reviewed by applicants prior to applying to the Seminar - <https://www.aspeninstitute.org/communityagreement/>

Photo Release

AEFI will on occasion use photographs of Seminar participants in its educational and informational materials and on the AEFI webpage - www.aspeninstitute.org/aefi. **All participants, by applying to participate in the Seminar, acknowledge that they may be photographed and that the photographs may be used in AEFI's educational and information materials.**

Seminar Participant List

To facilitate collegial exchange, Seminar participants are provided a list of fellow participants and their contact information. **This list is to be used solely by the participant and exclusively to contact other participants and is not to be shared, distributed, or used in any other way.**

Refund Policy:

No tuition refunds will be made. In the case of an inability to participate, with prior approval by AEFI tuition may be applied toward participation in the subsequent Seminar if the individual remains in a foundation leadership position at that time.



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ARTIST-ENDOWED FOUNDATIONS INITIATIVE | AEFI

Conducting Research, Publication, Professional Education, and Leadership Programs to Strengthen the Charitable Impact of the Emerging Artist-Endowed Foundation Field in Cultural Philanthropy and Art Stewardship. www.aspeninstitute.org/aeifi

AEFI OVERVIEW

The genesis of AEFI was what is now its principal research component — the National Study of Artist-Endowed Foundations — which was initiated in 2007 with the support of a donor consortium led by The Pollock-Krasner Foundation, Roy Lichtenstein Foundation, and Andy Warhol Foundation for the Visual Arts, and including major arts funders such as the Ford Foundation and Getty Foundation. These donors saw the potential of this young field to substantially expand the nation’s cultural philanthropy resources. They also recognized the field’s growing role in art stewardship. Responding to numerous requests for information from individuals considering or charged with foundation creation, and understanding the complexity of the task, these donors determined it was time to support a project to document and disseminate effective practices. As it has been since its inception, AEFI’s mission is to help the next generation of artist-endowed foundations make the most of their founders’ generosity in service to a charitable purpose. It aims to strengthen this next generation, and optimize its charitable capacity, by filling the significant information gap facing individuals involved in creating, leading, governing, and advising foundations. By shortening the steep learning curve inherent in these distinctively endowed entities, AEFI helps ensure that charitable resources can be spent on charitable purposes, not costly lessons. To this end, AEFI conducts ongoing programs to develop and share knowledge with key audiences. These programs and their participants include:

- **Research** — AEFI’s National Study of Artist-Endowed Foundations, its groundbreaking, ongoing research program that tracks and evaluates development of the artist-endowed foundation field at five-year intervals. The Study documents and details the field’s growth on multiple dimensions, analyzes factors driving and shaping this growth, and explores ramifications for foundation practice. The Study’s findings inform AEFI’s publication and education programs and are the focus of its knowledge-sharing activities broadly.

- **Publications** — The initial Study Report—*The Artist As Philanthropist; Strengthening the Emerging Artist-Endowed Foundation Field*, regular Study Report Supplements and updates, briefing papers on critical issues, and targeted publications, such as *A Reading Guide to the Study Report for Artists and Their Family Members*. These resources, available at no cost on the AEFI web page – www.aspeninstitute.org/aei, are used by artists, artists’ families, associates and advisors, foundation leaders, policymakers, journalists, scholars, curators, educators, and students.
- **Education Programs** — The Seminar on Strategy for Artist-Endowed Foundation Leaders, assisting the professional development of foundation leaders as they enter the field, refresh their practice, or support an artist’s legacy planning with respect to potential foundation creation, and the Artist-Endowed Foundation Leadership Forum, convening foundation leaders, field experts, and thought leaders to examine and discuss critical issues and important innovations in policy and practice that are influencing the field.
- **Further Knowledge-Sharing Events** — Workshops for potential foundation creators, including artists and their spouses/partners, and artists' surviving spouses and heirs; briefing sessions for foundation advisors, including attorneys, art dealers, investment advisors, and accountants, hosted by local and national professional associations; and public panel discussions for members of the art, museum, philanthropy, education, and media fields, and for interested public audiences, hosted by leading cultural institutions, including The Museum of Modern Art, New York; Los Angeles County Museum of Art; Harvard Art Museums, Cambridge; Fine Arts Museums of San Francisco; Graham Foundation for Advanced Studies in the Visual Arts, Chicago; and the Clark Art Institute, Williamstown, among others

Christine J. Vincent leads AEFI in the role of Project Director. She is a seasoned foundation executive and education leader who served formerly as Deputy Director, Media, Arts and Culture, at the Ford Foundation and as President, Maine College of Art. AEFI’s work is informed by a group of esteemed advisors whose members include prominent practitioners and scholars in the arts and culture, museum, philanthropy, public policy, law, and education fields. AEFI’s work is supported by the staff and colleagues of the Aspen Institute Program on Philanthropy and Social Innovation, and by the staff and colleagues of the many cultural and educational institutions and artist-endowed foundations who partner with AEFI to realize its programs.

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Chief among our partners are the AEFI Lead Underwriters, firms that provide core support to sustain AEFI and its foundation leadership and professional development programs, and also share their intellectual capital by collaborating in the development and dissemination of educational information and materials to assist the artist-endowed foundation field.



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