WEEKLY ON TUESDAYS
APRIL 6 – JUNE 22, 2021
1:00 - 5:15 PM ET

——

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

——

HOSTED BY
THE EASTON FOUNDATION/LOUISE BOURGEOIS ARCHIVE
THE KEITH HARING FOUNDATION
THE MIKE KELLEY FOUNDATION FOR THE ARTS
JOAN MITCHELL FOUNDATION
THE GORDON PARKS FOUNDATION
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 2021 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:

THE EASTON FOUNDATION/LOUISE BOURGEOIS ARCHIVE
THE KEITH HARING FOUNDATION
THE MIKE KELLEY FOUNDATION FOR THE ARTS
JOAN MITCHELL FOUNDATION
THE GORDON PARKS 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 Ruth E. Fine, Honorary Chair, AEFI Advisors and Chair, Roy Lichtenstein Foundation, whose wise perspectives inform AEFI’s programs and aspirations.

Lastly, we welcome the participants in the 2021 Seminar on Strategy for AEF Leaders and recognize them as leaders of the next generation of artist-endowed foundations.

Christine J. Vincent
AEFI Project Director
Seminar Director
2021 Seminar Dates - All Seminar Activities Take Place Online
Opening Reception: Monday, April 5 – 5:00 to 6:30 PM ET
Course Sessions: Weekly on Tuesdays, April 6 – June 22, 2021, 1:00 to 5:15 PM ET
Closing Celebration: Tuesday, June 22 – 5:00 to 6:30 PM ET

2021 Seminar Schedule Overview

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<td>Opening Reception Welcomes, Introductions, Socializing</td>
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<tr>
<td>Tuesday, April 6</td>
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### 2021 Seminar Schedule Overview, Continued

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<tr>
<td><strong>Tuesday, May 18</strong></td>
<td><strong>Session 3.3  Archives</strong>&lt;br&gt;<strong>Session 3.4  Intellectual Property</strong>&lt;br&gt;Crosscutting Conversation: Oeuvre Management Recap/Reflect</td>
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<td><strong>1:00 – 5:15 PM ET</strong></td>
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<tr>
<td><strong>Tuesday, May 25</strong></td>
<td><strong>Site Visit: Joan Mitchell Foundation</strong>&lt;br&gt;<strong>4. Philanthropic Impact</strong>&lt;br&gt;<strong>Session 4.1  Grantmaking</strong>&lt;br&gt;<strong>Session 4.2  Support to Individuals</strong></td>
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<tr>
<td><strong>1:00 – 5:15 PM ET</strong></td>
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<tr>
<td><strong>Tuesday, June 1</strong></td>
<td><strong>Session 4.3  Museum Gifts and Charitable Sales</strong>&lt;br&gt;<strong>Session 4.4  Educational Programs</strong>&lt;br&gt;Crosscutting Conversation: Foundation Termination Recap/Reflect</td>
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<tr>
<td><strong>1:00 – 5:15 PM ET</strong></td>
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<tr>
<td><strong>Tuesday, June 8</strong></td>
<td><strong>Site Visit: The Easton Foundation/Louise Bourgeois Archive</strong>&lt;br&gt;<strong>5. Foundation Operations</strong>&lt;br&gt;<strong>Session 5.1  Professional Advisors</strong>&lt;br&gt;<strong>Session 5.2  Risk Management</strong></td>
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<td><strong>1:00 – 5:15 PM ET</strong></td>
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<tr>
<td><strong>Tuesday, June 15</strong></td>
<td><strong>Session 5.3  Digital Engagement</strong>&lt;br&gt;<strong>Session 5.4  Foundation Planning</strong>&lt;br&gt;Crosscutting Conversation: Diversity, Equity, Inclusion Recap/Reflect</td>
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<tr>
<td><strong>1:00 – 5:15 PM ET</strong></td>
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<tr>
<td><strong>Tuesday, June 22</strong></td>
<td><strong>Seminar Closing Class</strong>&lt;br&gt;Recap/Reflect/Recognitions</td>
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<td><strong>1:00 – 2:45 PM ET</strong></td>
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<tr>
<td><strong>5:00 – 6:30 PM ET</strong></td>
<td><strong>Seminar Closing Celebration &amp; Fifth Anniversary Celebration</strong>&lt;br&gt;Welcomes, Presentations, Socializing</td>
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<tr>
<td><strong>Recap/Reflect</strong></td>
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<td><strong>5:00 – 6:30 PM ET</strong></td>
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# 2021 Seminar on Strategy for AEF Leaders

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<th>Module</th>
<th>Week</th>
<th>Date</th>
<th>Day</th>
<th>1:00 to 2:15 PM EST</th>
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<tr>
<td><strong>Course Start-up</strong></td>
<td>1</td>
<td>5-Apr</td>
<td>MON</td>
<td>1:00 to 2:15 PM EST</td>
<td>1:00 to 2:45 PM EST</td>
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<tr>
<td><strong>Legacy Stewardship</strong></td>
<td>2</td>
<td>6-Apr</td>
<td>TUES</td>
<td>1:00 to 2:15 PM EST</td>
<td>1:00 to 2:45 PM EST</td>
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<tr>
<td><strong>Organizational Viability</strong></td>
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<td>13-Apr</td>
<td>TUES</td>
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<td><strong>Cultural Asset Stewardship</strong></td>
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<td><strong>Philanthropic Impact</strong></td>
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<td><strong>Foundation Operations</strong></td>
<td>6</td>
<td>4-May</td>
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<tr>
<td><strong>Course Conclusion</strong></td>
<td>7</td>
<td>11-May</td>
<td>TUES</td>
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<td>1:00 to 2:45 PM EST</td>
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<td><strong>Foundation Operations</strong></td>
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<td>18-May</td>
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<tr>
<td><strong>Philanthropic Impact</strong></td>
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<td>25-May</td>
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<tr>
<td><strong>Foundation Operations</strong></td>
<td>10</td>
<td>1-Jun</td>
<td>TUES</td>
<td>1:00 to 2:15 PM EST</td>
<td>1:00 to 2:45 PM EST</td>
<td>5:00 to 6:30 PM EST</td>
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<tr>
<td><strong>Course Conclusion</strong></td>
<td>11</td>
<td>8-Jun</td>
<td>TUES</td>
<td>1:00 to 2:15 PM EST</td>
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<td><strong>Foundation Operations</strong></td>
<td>12</td>
<td>15-Jun</td>
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**AEF Hosts:** The Mike Kelley Foundation for the Arts • The Keith Haring Foundation • The Gordon Parks Foundation • Joan Mitchell Foundation • The Easton Foundation

The Aspen Institute Artist-Endowed Foundations Initiative/AEFI
2021 Seminar Schedule Detail

Monday, April 5
5:00 – 6:30 PM ET

Opening Reception
Welcome, Introductions, and Socializing

<table>
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<th>Seminar Participants</th>
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Welcome
Ruth E. Fine
Honorary Chair, AEFI Advisors
Chair, Roy Lichtenstein Foundation
Former Curator of Special Projects in Modern Art, National Gallery of Art

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

Tuesday, April 6
1:00 – 2:45 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

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

Seminar Participants

Jennifer Dowley
AEFI Advisor and Principal, Dowley Associates
Former President, Berkshire Taconic Community Foundation
Tuesday, April 13  
1:00 – 5:15 PM ET

1:00 – 2:15 PM ET
Site Visit: The Mike Kelley Foundation for the Arts  
Mary Clare Stevens  
Executive Director  
mikekelleyfoundation.org

1. 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 1.1 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

A. Nicole Campbell  
CEO, Build Up Advisory Group and Managing Attorney, The Campbell Law Firm  
Former Senior Director of Operations and Foundation General Counsel, Dalio Philanthropies, and Former Deputy General Counsel & Secretary, Open Society Foundations

4:00 – 5:15 PM ET
Session 1.2 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

James J. Fishman
Professor of Law Emeritus, Elisabeth Haub School of Law, Pace University
Co-Author: New York Nonprofit Law & Practice with Tax Analysis (LexisNexis)

Tuesday, April 20
1:00 – 5:15 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

Marion R. Fremont-Smith
AEFI Advisor and Senior Fellow, Hauser Institute for Civil Society, Harvard University
Author: Governing Nonprofit Organizations: Federal and State Law and Regulation (Belknap Press)

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

Jackie Ewenstein
Co-Chair, New York City Bar Nonprofit Organizations Committee
Partner, Ewenstein & Roth LLP

4:00 – 5:00 PM ET
Crosscutting Conversation: Foundation and Family
Learning From a Foundation and Family Experience

Conversation Guest
Jack Cowart
Executive Director
Roy Lichtenstein Foundation

5:00 – 5:15 PM ET
Recap/Reflect
Open Questions on the Legacy Stewardship and AEFs Curriculum?
Major Take-Aways?

Christine J. Vincent
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: Joan Mitchell Foundation
- 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

Christa Blatchford  
CEO  
Joan Mitchell Foundation

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

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: Michael Asher Foundation
- Leadership Insights: Adolph and Esther Gottlieb Foundation
- Questions and Discussion
- Session Summary: Seminar Participants
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
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

Trella Walker
Vice President and Chief Strategy Officer
Nonprofit Finance Fund

George Suttles
Executive Director
Commonfund Institute

Sandy S. Lee
Board Treasurer
Joan Mitchell Foundation

4:00 – 5:00 PM ET
Crosscutting Conversation: Long-term Stewardship Planning
*Considering Artists’ Varied Approaches to Stewardship Planning*

**Conversation Guests**
Susan Larsen
Executive Director
The Dorothea and Leo Rabkin Foundation

Jack Flam
President and CEO
Dedalus Foundation
(Robert Motherwell)

5:00 – 5:15 PM ET
Recap/Reflect
*Open Questions on the Organizational Viability Curriculum?*
*Major Take-Aways?*

Christine J. Vincent
Tuesday, May 11
1:00 – 5:15 PM ET

1:00 – 2:15 PM ET
Site Visit: The Gordon Parks Foundation
Peter W. Kunhardt, Jr.
Executive Director
https://www.gordonparksfoundation.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 Collection
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: The Hedda Sterne Foundation
- Leadership Insights: The Josef and Anni Albers Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty
Bruce Altshuler, Moderator
Director, Program in Museum Studies
New York University

April A. Johnson
Associate Director of Business Development
UOVO (AEFI Lead Underwriter)

Shaina Larrivee
Executive Director
The Hedda Sterne Foundation

Brenda Danilowitz
Chief Curator
The Josef and Anni Albers Foundation

4:00 – 5:15 PM ET
Session 3.2 Oeuvre Scholarship
What factors influence an AEF’s involvement and approach to different types of oeuvre scholarship initiatives?

- Oeuvre Scholarship: Catalogues Raisonnés, Oral History, Conservation Research
- Leadership Insights: Dedalus Foundation
Leadership Insights: Sam Francis Foundation
Leadership Insights: 500 Capp Street Foundation/David Ireland House
Questions and Discussion
Session Summary: Seminar Participants

Class Faculty
Bruce Altshuler, Moderator
Director, Program in Museum Studies
New York University

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

Carlie Wilmans
Founding Trustee/Founder
500 Capp Street Foundation/David Ireland House

Tuesday, May 18
1:00 – 5:15 PM ET

Cultural Asset Stewardship, Continued

1:00 – 2:15 PM ET
Session 3.3 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
• Leadership Insights: The Woodman Family Foundation
• Leadership Insights: Esteban Vicente Foundation
• Challenges in Initiating Archive Stewardship
• Questions and Discussion
• Session Summary: Seminar Participants

Class Faculty
Christine J. Vincent, Moderator

Lissa McClure
Executive Director
The Woodman Family Foundation
(Betty Woodman, Francesca Woodman, George Woodman)
Eren Johnson  
Director and Editor, Esteban Vicente Catalogue Raisonné  
Harriet and Esteban Vicente Foundation

Laura Hortz Stanton  
Executive Director  
Conservation Center for Art & Historic Artifacts

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: The Isamu Noguchi Foundation and Garden Museum
- IP Licensing Basics
- Questions and Discussion
- Session Summary: Seminar Participants

**Class Faculty**  
Christine J. Vincent, Moderator

Janet Hicks  
Vice President and Director of Licensing  
Artists Rights Society/ARS (AEFI Lead Underwriter)

Michael Dayton Hermann  
Director of Licensing, Marketing, and Sales  
The Andy Warhol Foundation for the Visual Arts

Brett Littman  
Executive Director  
The Isamu Noguchi Foundation and Garden Museum

4:00 – 5:00 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)

5:00 - 5:15 PM ET
Recap/Reflect

Open Questions on the Cultural Asset Stewardship Curriculum?
Major Take-Aways?

Christine J. Vincent
Tuesday, May 25
1:00 – 5:15 PM ET

1:00 – 2:15 PM ET
Site Visit: Joan Mitchell Foundation
Christa Blatchford
CEO
https://www.joanmitchellfoundation.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 – 345 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: The Richard Pousette-Dart 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
Alberta Arthurs, Moderator
AEFI Advisor and Former Director, Arts and Humanities
Rockefeller Foundation

Charles Duncan
Executive Director
The Richard Pousette-Dart 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: Graham Foundation for Advanced Studies in the Fine Arts
• Leadership Insights: Ellis-Beauregard Foundation
• Questions and Discussion
• Session Summary: Seminar Participants

Class Faculty
Alberta Arthurs, Moderator
AEFI Advisor and Former Director, Arts and Humanities
Rockefeller Foundation

Christina Hunter
Executive Director
Nancy Graves Foundation

Sarah Herda
Executive Director
Graham Foundation for Advanced Studies in the Fine Arts
(Ernest R. Graham)

Donna McNeil
Executive Director
Ellis-Beauregard Foundation
(David Ellis, Joan Beauregard)

Tuesday, June 1
1:00 – 5:15 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: Irving Penn Foundation
• Leadership Insights: Helen Frankenthaler Foundation
• Questions and Discussion
• Session Summary: Seminar Participants

Class Faculty
Christine J. Vincent, Moderator

H. Nicholas B. Clark
Executive Director
Ashley Bryan Center
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: Noah Purifoy Foundation
- Leadership Insights: Al Held Foundation
- Leadership Insights: Renee and Chaim Gross Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty
Christine J. Vincent, Moderator

Joseph S. Lewis III
President
Noah Purifoy Foundation

Daniel Belasco
Executive Director
Al Held Foundation

Sasha Davis
Executive Director
Renee and Chaim Gross Foundation

4:00 – 5:00 PM ET
Crosscutting Conversation: Foundation Termination
Looking at two approaches to foundation termination

Conversation Guests
Katherine Shields
President/Executive Director
Frederick Hammersley Foundation

Lawrence S. Taub
Former President
Mandelman-Ribak Foundation
(Beatrice Mandelman, Louis Ribak)
5:00 – 5:15 PM ET
Recap/Reflect

*Open Questions on the Philanthropic Impact Curriculum?*

*Major Take-Aways?*

Christine J. Vincent
Tuesday, June 8
1:00 – 5:15 PM EST

1:00 – 2:15 PM ET
Site Visit: The Easton Foundation/Louise Bourgeois Archive
Maggie Wright
Executive Director
theeastonfoundation.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
Michael Conforti, Moderator
AEFI Advisor and Director Emeritus
The Clark Art Institute

Christine J. Vincent
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
Michael Conforti, Moderator
AEFI Advisor and Director Emeritus
The Clark Art Institute

Sharon Ullman
Deputy Director
Robert Rauschenberg Foundation

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

Robert Rosenzweig
Vice President/National Cyber Risk Practice Leader
Risk Strategies (AEFI Lead Underwriter)

**Tuesday, June 15**
1:00 – 5:15 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: Robert Rauschenberg Foundation
• Leadership Insights: Reversible Destiny Foundation
• Principles of Digital Engagement
• Questions and Discussion
• Session Summary: Seminar Participants

Class Faculty
Christine J. Vincent, Moderator

Francine Snyder
Director of Archives
Robert Rauschenberg Foundation
Momoyo Homma  
Board Member  
Reversible Destiny Foundation  
(Arakawa + Madeline Gins)

Perry Hewitt  
Chief Marketing Officer, data.org  
Former Chief Digital Officer, Harvard University

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  
- Leadership Insights: Holt/Smithson Foundation  
- 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)

Lisa Le Feuvre  
Executive Director  
Holt/Smithson Foundation  
(Nancy Holt, Robert Smithson)

Jennifer Dowley  
AEFI Advisor and Principal, Dowley Associates  
Former President, Berkshire Taconic Community Foundation

4:00 – 5:00 PM ET  
Crosscutting Conversation: AEFs and Diversity, Equity, Inclusion  
What role does effective DEI 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  
Joan Weinstein  
Board Member, The Mike Kelley Foundation for the Arts  
Director, Getty Foundation
Joseph S. Lewis III  
President  
Noah Purify Foundation

Mikka Gee Conway  
Director of Diversity, Inclusion, and Belonging  
National Gallery of Art

5:00 – 5:15 PM ET  
Recap/Reflect  
*Open Questions on the Foundation Operations Curriculum?*  
*Major Take-Aways?*

Christine J. Vincent
Tuesday, June 22
1:00 – 2:45 PM ET and 5:00 – 6:30 PM ET

Course Conclusion

1:00 – 2:45 PM ET
Seminar Closing Class
Recap/Reflect/Collegial Recognitions
The Way Forward

Christine J. Vincent
Seminar Participants

5:00 – 6:30 PM ET
Seminar Closing Celebration & Fifth Anniversary Salute
Certificate Presentations/Introductions, Reconnections, Networking

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AEFI Lead Underwriters       AEFI Donors       Seminar Team
Seminar Faculty              Seminar Alumni


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Former Senior Director of Operations and Foundation General Counsel, Dalio Philanthropies, and Former Deputy General Counsel & Secretary, Open Society Foundations

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Former Curator of Special Projects in Modern Art, National Gallery of Art

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Co-Editor: *New York Nonprofit Law & Practice with Tax Analysis* (LexisNexis)

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Author: *Governing Nonprofit Organizations: Federal and State Law & Regulation* (Belknap Press)

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Project Director
Artist-Endowed Foundations Initiative/AEFI
The Aspen Institute

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SEMINAR FINANCE DIRECTOR
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Program on Philanthropy and Social
Innovation
The Aspen Institute
2021 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 stewardship planning with respect to a potential foundation.

The Seminar 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.*

**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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THE ASPEN INSTITUTE
ARTIST-ENDEOVED FOUNDATIONS INITIATIVE/AEFI


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/aeфи, 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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**AEFI Donor Consortium Leaders**

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Sponsors of AEFI’s work are some of the foremost firms providing services to philanthropy, the arts, and education. We are proud to count them as partners in realizing AEFI’s mission to strengthen the charitable impact of the emerging artist-endowed foundation field.

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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