

**ARTIST-ENDOWED
FOUNDATIONS
INITIATIVE**

PHILANTHROPY & SOCIAL INNOVATION
 aspen institute

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

2021

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

SEMINAR ON STRATEGY *for* ARTIST-ENDOWED FOUNDATION LEADERS

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-ENDOWED 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

Monday, April 5
5:00 – 6:30 PM ET

Opening Reception
Welcomes, Introductions, Socializing

Tuesday, April 6
1:00 – 2:45 PM ET

Seminar Opening Class
Seminar Orientation and Participant Engagement

Tuesday, April 13
1:00 – 5:15 PM ET

Site Visit: The Mike Kelley Foundation for the Arts
1. Legacy Stewardship and Artist-Endowed Foundations
Session 1.1 Foundation Basics
Session 1.2 Public Benefit

Tuesday, April 20
1:00 – 5:15 PM ET

Session 1.3 Fiduciary Duties
Session 1.4. Foundations and Individuals
Crosscutting Conversation: Foundation and Family
Recap/Reflect

Tuesday, April 27
1:00 – 5:15 PM ET

Site Visit: The Keith Haring Foundation
2. Organizational Viability
Session 2.1 Governance
Session 2.2 Starting Up/Reorganizing

Tuesday, May 4
1:00 – 5:15 PM ET

Session 2.3 Art Market Strategy
Session 2.4 Business Model
Crosscutting Conversation: Long-term Stewardship Planning
Recap/Reflect

Tuesday, May 11
1:00 – 5:15 PM ET

Site Visit: The Gordon Parks Foundation
3. Cultural Asset Stewardship
Session 3.1 Art Collections
Session 3.2 Oeuvre Scholarship

2021 SEMINAR SCHEDULE OVERVIEW, CONTINUED

Tuesday, May 18
1:00 – 5:15 PM ET

Session 3.3 Archives
Session 3.4 Intellectual Property
Crosscutting Conversation: Oeuvre Management
Recap/Reflect

Tuesday, May 25
1:00 – 5:15 PM ET

Site Visit: Joan Mitchell Foundation
4. Philanthropic Impact
Session 4.1 Grantmaking
Session 4.2 Support to Individuals

Tuesday, June 1
1:00 – 5:15 PM ET

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

Tuesday, June 8
1:00 – 5:15 PM ET

Site Visit: The Easton Foundation/Louise Bourgeois Archive
5. Foundation Operations
Session 5.1 Professional Advisors
Session 5.2 Risk Management

Tuesday, June 15
1:00 – 5:15 PM ET

Session 5.3 Digital Engagement
Session 5.4 Foundation Planning
Crosscutting Conversation: Diversity, Equity, Inclusion
Recap/Reflect

Tuesday, June 22
1:00 – 2:45 PM ET

Seminar Closing Class
Recap/Reflect/Recognitions

5:00 – 6:30 PM ET

Seminar Closing Celebration & Fifth Anniversary Celebration
Welcomes, Presentations, Socializing

2021 SEMINAR ON STRATEGY FOR AEF 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
Course Start-up	1	5-Apr	MON	1:00 to 2:45 PM EST		Opening Reception 5:00 to 6:30 PM EST
	2	6-Apr	TUES	Opening Class		
Legacy Stewardship	3	13-Apr	TUES	Site Visit: Kelley	Foundation Basics	Public Benefit
	4	20-Apr	TUES	Fiduciary Duties	Foundations & Individuals	Foundation & Family Recap
Organizational Viability	5	27-Apr	TUES	Site Visit: Haring	Governance	Starting Up/Re-Organizing
	6	4-May	TUES	Art Market Strategy	Business Model	Stewardship Planning Recap
Cultural Asset Stewardship	7	11-May	TUES	Site Visit: Parks	Art Collections	Oeuvre Scholarship
	8	18-May	TUES	Archives	Intellectual Property	Oeuvre Management Recap
Philanthropic Impact	9	25-May	TUES	Site Visit: Mitchell	Grantmaking	Support to Individuals
	10	1-Jun	TUES	Museums Gifts/Sales	Educational Programs	Foundation Termination Recap
Foundation Operations	11	8-Jun	TUES	Site Visit: Easton	Professional Advisors	Risk Management
	12	15-Jun	TUES	Digital Engagement	Foundation Planning	Diversity/Equity/Inclusion Recap
Course Conclusion	13	22-Jun	TUES	Closing Class 1:00 to 2:45 PM EST		Closing Celebration 5:00 to 6:30 PM EST

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

Seminar Participants

AEF Hosts

AEFI Advisors

AEFI Lead Underwriters

AEFI Donors

Seminar Team

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

Tuesday, April 27
1:00 – 5:15 PM ET

1:00 – 2:15 PM ET

Site Visit: The Keith Haring Foundation
Gilbert Vazquez
Acting Executive Director
haring.com

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

Class Faculty

Christine J. Vincent, Moderator

Andrew S. Auchincloss

Former Chair, New York City Bar Trusts, Estates & Surrogate's Court Committee
Partner, Schlesinger Lazetera Auchincloss LLP

Karen Dunbar

Executive Director

Michael Asher Foundation

Sanford Hirsch

Executive Director

Adolph and Esther Gottlieb Foundation

Tuesday, May 4

1:00 – 5:15 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

Diana Wierbicki

Chair, New York City Bar Art Law Committee
Partner, Withersworldwide

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

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 in 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 Hartz 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 – 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: 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

Vasilios Zatse
Deputy Director
The Irving Penn Foundation

Elizabeth Smith
Executive Director
Helen Frankenthaler 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: 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

Seminar Participants

AEFI Lead Underwriters

Seminar Faculty

AEF Hosts

AEFI Donors

Seminar Alumni

AEFI Advisors

Seminar Team

SEMINAR FACULTY

Bruce Altshuler

Director
Program in Museum Studies,
New York University

Alberta Arthurs

AEFI Advisor and Former Director,
Arts and Humanities
Rockefeller Foundation

Andrew S. Auchincloss

Former Chair, New York City Bar Trusts,
Estates & Surrogate's Court Committee
Partner, Schlesinger Lazetera Auchincloss
LLP

Daniel Belasco

Executive Director
Al Held Foundation

Rachel Bers

Program Director
The Andy Warhol Foundation for the
Visual Arts

Gayle Binney

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

Christa Blatchford

CEO
Joan Mitchell Foundation

Debra Burchett-Lere

President/Executive Director
Sam Francis Foundation

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
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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-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/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/aeFI, 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's research and publication programs are supported by its philanthropic donors, whose grants ensure that AEFI's resources are available to whoever requires this important information—artists, advisors, foundation leaders, educators, students, scholars, journalists, and the interested public.

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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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