

**ARTIST-ENDOWED
FOUNDATIONS
INITIATIVE**

PHILANTHROPY & SOCIAL INNOVATION



**2 0 2 2
ARTIST-ENDOWED
FOUNDATION
LEADERSHIP FORUM**

— HOSTED BY —
MUSEUM OF FINE ARTS, BOSTON
VIRGINIA MUSEUM OF FINE ARTS

ISSUES & INNOVATIONS IN PRACTICE & POLICY

An Invitational Symposium for
Senior Leaders of Artist-Endowed Foundations
Tuesday, May 24 and Wednesday, May 25, 2022

**ARTIST-ENDOWED
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INITIATIVE**

PHILANTHROPY & SOCIAL INNOVATION
aspen institute

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VIRGINIA MUSEUM OF FINE ARTS**

ISSUES & INNOVATIONS IN PRACTICE & POLICY

AN INVITATIONAL SYMPOSIUM FOR
SENIOR LEADERS OF ARTIST-ENDOWED FOUNDATIONS
TUESDAY, MAY 24, 2022
WEDNESDAY, MAY 25, 2022
10:30 AM TO 6:30 PM EASTERN TIME



VIRTUAL 2022 AEF LEADERSHIP FORUM: PROGRAM OVERVIEW

ZONE: EST	Tuesday May 24 th Host: Museum of Fine Arts, Boston	Wednesday May 25 th Host: Virginia Museum of Fine Arts
10:30 AM	CONCURRENT OPPORTUNITIES: - Flexible Arrival & Exploration of the Site - Connect: Chat Exchanges & Video Meet-Ups - Networking: Meet New Colleagues - Expo: Explore Professional Partners	CONCURRENT OPPORTUNITIES: - Flexible Arrival - Connect: Chat Exchanges & Video Meet-Ups - Networking: Meet New Colleagues - Expo: Explore Professional Partners
11:15 AM	ORIENTATION TO THE EVENT	Sessions: Topical Roundtables
11:30 AM	1. WELCOME & OVERVIEW OF THE DAY	9. AEFI NEWS & OVERVIEW OF THE DAY
12:00 PM	2. CHARLIE BERGMAN KEYNOTE CONVERSATION <i>Investing in Art+Artists/Creating Community: Theaster Gates, President, Rebuild Foundation, and Maria Rosario Jackson, Chair, National Endowment for the Arts</i>	10. KEYNOTE REFLECTIONS <i>Turning the Corner on COVID: Surveying New AEF Developments in Art Stewardship and Cultural Philanthropy</i>
12:45 PM	3. PLENARY I – WEB 3.0 <i>What Should AEF Leaders Know About NFTs and Blockchain?</i>	11. PLENARY III – FIDUCIARY DUTY <i>Serving as an Artist's Executor/Trustee with a Foundation Beneficiary</i>
1:45 PM	CONCURRENT OPPORTUNITIES: - Sessions: Topical Roundtables - Connect: Video Meet-Ups - Networking: Meet New Colleagues - Expo: Explore Professional Partners Optional Screen Break: Lunch/Coffee/Stretch	CONCURRENT OPPORTUNITIES: - Sessions: Topical Roundtables - Connect: Video Meet-Ups - Networking: Meet New Colleagues - Expo: Explore Professional Partners Optional Screen Break: Lunch/Coffee/Stretch
2:45 PM	4. CLOSED DOOR SPOTLIGHT ON DUE DILIGENCE <i>Are We Responsible for Our Museum Partners' Actions?</i>	12. SPOTLIGHT ON SUSTAINABILITY <i>It's <u>Always</u> Time for Succession Planning</i>
3:15 PM	5. SPOTLIGHT ON LEADERSHIP <i>Advancing the DEAI Conversation</i>	13. SPOTLIGHT ON CYBER SECURITY <i>Preparing for Heightened Risks Post-Ukraine</i>
3:45 PM	6. PLENARY II – MORE THAN ONE ARTIST <i>Stewarding Multiple Oeuvres</i>	14. PLENARY IV – CLOSED DOOR CONVERSATION <i>AEFs and Artists Diagnosed With Dementia: Ask the Experts</i>
4:45 PM	7. SUMMARY REFLECTIONS ON THE DAY	15. SUMMARY REFLECTIONS ON THE DAY
5:00 PM	CONCURRENT OPPORTUNITIES (to 6:30 PM): - Connect: Video Meet-Ups - Networking: Meet New Colleagues - Expo: Explore Professional Partners	CONCURRENT OPPORTUNITIES (to 6:30 PM): - Connect: Video Meet-Ups - Networking: Meet New Colleagues - Expo: Explore Professional Partners
5:30 PM	Tour: Philip Guston Now Museum of Fine Arts, Boston	Tour: The Dirty South: Contemporary Art, Material Culture, and the Sonic Impulse Virginia Museum of Fine Arts
6:30 PM	8. 2022 FORUM'S FIRST DAY CONCLUDES	16. 2022 AEF LEADERSHIP FORUM CONCLUDES



As Artist-Endowed Foundations continue to navigate the political, racial, public health, environmental, economic, and social crosscurrents that are profoundly marking this moment in our times, it is important that the AEF community's leaders be able to come together in collegial exchange and mutual support.

FORUM PURPOSE AND PHILOSOPHY

The Forum aims to strengthen the charitable impact of the emerging artist-endowed foundation field by:

- Fostering collegial exchange among foundation leaders on issues and innovations in practice and policy influencing their work in cultural philanthropy and art stewardship;
- Building a shared body of knowledge about effective practice and introducing new foundation leaders into the community's conversations and network; and
- Informing the research, publication, education, and leadership programs of the Aspen Institute Artist-Endowed Foundations Initiative/AEFI.

The Forum is based on the belief that the AEF community will benefit from development of a shared body of knowledge about artist-endowed foundations, so that:

- Leaders are informed about the field's many dimensions, not just their own foundation's individual characteristics and concerns; and, as such,
- Leaders will serve as resources for the broader community's advancement, contributing their knowledge to artists, artists' family members, and other artist-endowed foundations.

SCHEDULE

Tuesday, May 24, 2022
Eastern Time

10:30 AM Log-in and Concurrent Opportunities (Continuing to 11:30 AM)

- Flexible Arrival and Exploration of the Site
- Connect: Chat Exchanges and One-on-One Video Meet-Ups
- Networking: Meet New Colleagues
- EXPO: Explore Professional Partners

11:15 AM Orientation to the Platform

11:30 PM I. Welcome and Overview of the Day Welcome on Behalf of:

Museum of Fine Arts, Boston

Matthew Teitelbaum, Ann and Graham Gund Director, Museum of Fine Arts, Boston

Aspen Institute Artist-Endowed Foundations Initiative | AEFI

Ruth Fine, Chair, Roy Lichtenstein Foundation, and Honorary Chair, AEFI Advisors

2022 AEF Leadership Forum

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

12:00 PM

2. Charlie Bergman Conversation Investing in Art+Artists/Creating Community

Question: What Do a Widely Recognized Artist Known for His Deep Commitment to Building Community and a Prominent Policymaker Known For Her Scholarship on the Role of the Arts In "Placemaking" See for the Art and Artists at This Moment in Our Times?

Guests: **Theaster Gates**, President, Rebuild Foundation
Maria Rosario Jackson, Chair, National Endowment for the Arts

Interlocutor: **Samuel Hoi**, President
Maryland Institute, College of Art

12:45 PM

3. Plenary I Web 3.0 - What Should AEF Leaders Know About NFTs and Blockchain?

Question: While AEFs Have Long Licensed Their Copyrights to Generate Revenue, Some Have Begun to Deploy Their IP by Minting and Selling NFTs, Adding a New Revenue Stream to Fund Grant and Education Programs. AEFs Also Have Begun to Issue Block-Chain Secured Certificates of Authenticity When They Sell Artworks, Ensuring Correct Documentation of the Work and its Provenance in Perpetuity. Lastly, Some Have Incorporated a "Smart Contract" to Require Payment of a Resale Royalty as a Condition for Sale Completion, Tied to Transfer of a Certificate. What Are AEF Leaders Learning About All of This?

Readings: Marr - *Web 3.0 and Metaverse Explained*
Quinn Emanuel - *NFTs: Legal Risks From Minting Art on the Blockchain*
Jovic - *How to Use Blockchain to Authenticate Art*

Moderator: **Sandy S. Lee**, Adjunct Professor, Masters in Visual Arts Administration Program, New York University

Speakers: **Katarina Feder**, Vice President and Director of Business Development, Artists Rights Society | ARS (AEFI Lead Underwriter)
Michael Dayton Hermann, Director of Licensing/Marketing/Sales
The Andy Warhol Foundation for the Visual Arts
Elizabeth Dee, Director, John Giorno Foundation
Edward Lee, Co-Director, Program in IP Law, Chicago-Kent College of Law, Illinois Institute of Technology

1:45 PM

Concurrent Opportunities

- Session Roundtables: Discuss the Issues

- ◆ Session 1A: topic tbd
- ◆ Session 1B: topic tbd
- ◆ Session 1C: topic tbd
- Connect: One-on-One Video Meet-Ups
- Networking: Meet New Colleagues
- EXPO: Explore Professional Partners
- Optional Screen Break: Lunch/Coffee/Stretch

2:45 PM **4. Closed Door Spotlight on Due Diligence - Are We Responsible for Our Museum Partners' Actions?**
Conversation is Confidential

Question: How Do AEFs Respond When Museums Partners Become Embroiled in Controversy Over Their Actions With Respect to Such Matters as Lack of Diversity, Hostile Employee Climate, Poor Treatment of Artists, Etc.? Do AEF Leaders Need to Rethink Their Due Diligence Process for Museum Partners? Can They Play a Productive Role to Advance Appropriate Practices? And What Ground do They Stand on Themselves?

Readings: Bakare - *Barbican Staff Say it is Institutionally Racist*
 Pogrebin - *The New Museum is World Class, but Many Find it A Tough Place to Work*

Moderator: **Bruce Altshuler**, Founder and Former Director, Program in Museum Studies, New York University

Speakers: **Rachel Churner**, Director, Carolee Schneemann Foundation
Brett Littman, Director, Isamu Noguchi Foundation and Garden Museum
Gil Vazquez, Director, Keith Haring Foundation

3:15 PM **5. Spotlight on Leadership - Advancing the DEAI Conversation**

Question: AEFI is Underway With the Year-Long Project, Advancing the AEF Community's DEAI Capacity to Host BIPOC Internships/Fellowships. This Session Shares Preliminary Findings From the Project's Research, Examining Current Practices and AEF Leaders' Perspectives, and Asks What AEF Leaders Can Do to Advance The DEAI Conversation Within Their Organizations?

Readings: AEFI - *Basic AEFI Mission Example*
 MMT - *DEI Spectrum Tool*
 REAL Forum - *Continuum on Becoming an Anti-Racist Arts Organization*

Moderator: **Miecha Renae Forbes**, Vice President for People & Culture, The Aspen Institute

Speakers: **Nikki Kirk**, AEFI Project Consultant
Jade Agua, Chief Learning Officer, USC Race & Equity Center

3:45 PM **6. Plenary II More Than One Artist - Stewarding Multiple Oeuvres**

Question: As the AEF Community Continues to Expand, the Number of Foundations With More Than One Associated Artist is Growing as are Questions

About How AEFs Manage Stewardship of Multiple Artists' Oeuvres, Often Dealing With Challenges Presented by Scholarly and Market Perspectives Rising From a History of Gender or Generational Prejudice. What Have AEF Leaders Learned About These Challenges?

Moderator: **Franklin Sirmans**, Director, Pérez Art Museum Miami, and AEFI Advisor

Speakers: **Nicholas Fox-Weber**, Executive Director, The Josef & Anni Albers Foundation

Lisa Le Feuvre, Executive Director, Holt/Smithson Foundation

Lissa McClure, Executive Director, The Woodman Family Foundation

Steven Rose, Executive Director, Emily Mason and Alice Trumbull Mason Foundation

4:45 PM **7. Summary Reflections on the Day**

Question: What Key Takeaways and Important Points Raised During the Day do a Group of AEF Leaders Whose Foundations are Diverse by Such Factors as Age, Art Medium, and Artist, Wish to Share With Their Colleagues?

Respondents: **Richard Benefield**, Executive Director, George Rickey Foundation

Karen Dunbar, Executive Director, The Michael Asher Foundation

Tony Bechara, Executor, Carmen Herrera Estate

5:00 PM **Concurrent Opportunities (Continuing to 6:30 PM)**

- Sessions Roundtables: Discuss the Issues
 - ♦ Session 2A: topic tbd
 - ♦ Session 2B: topic tbd
 - ♦ Session 2C: topic tbd
- Connect: One-on-One Video Meet-Ups
- Networking: Meet New Colleagues
- EXPO: Explore Professional Partners

5:30 PM **8. Curator-Led Tour - Museum of Fine Arts, Boston**

Exhibition: *Philip Guston Now*

Question: Organized by the MFA, Boston; National Gallery of Art, Washington; Museum of Fine Arts, Houston; and Tate Modern, London, This Major Exhibition Foregrounds Works Emblematic of Philip Guston's Lifelong Commitment to Raising Difficult, Even Unanswerable, Questions, Placing Them at the Heart of an Oeuvre Considered Among the Most Remarked Upon in Modern Art. What has the Curatorial Team Learned as it Presents This Exhibition of an Important Artist's Works for a Broad Public?

Readings: Cotter - *After a Tempest, Guston Shines*
Tracy and Pogrebin - *Delayed Philip Guston Show Opens, With a Note From a Trauma Specialist*

Curatorial **Ethan Lasser** - John Moors Cabot Chair, Art of the Americas, Museum of Fine Arts, Boston

Team: **Kate Nesin** - Adjunct Curator, Contemporary Art, Museum of

6:30 PM **Conclusion of the Forum's First Day**

SCHEDULE

Wednesday, May 25, 2022

Eastern Time

10:30 AM **Concurrent Opportunities**

- Flexible Arrival
- Session Roundtables: Discuss the Issues
 - Session 3A: Meet Museum HUE, Hosted by Joan Mitchell Foundation
 - Session 3B: topic tbd
 - Session 3C: topic tbd
- Connect: Chat Exchanges & One-on-One Video Meet-Ups
- Networking: Meet New Colleagues
- EXPO: Explore Professional Partners

11:30 PM **9. Welcome, AEFI News, and Overview of the Day**

Welcome on behalf of:

Virginia Museum of Fine Arts

Alex Nyerges, Director and Chief Executive Officer, VMFA

2022 AEF Leadership Forum

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

Aspen Institute Artist Endowed Foundations Initiative | AEFI

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

12:00 PM **10. Keynote Reflections - Turning the Corner on COVID: Surveying New AEF Developments**

Question: What New Projects and Fresh Strategies Have Artist-Endowed Foundations Recently Initiated, Evidencing the AEF Community's Vitality Even as its Members Continue to Work Under the Constraints Imposed by COVID and its Many Broader Impacts?

Reading: *Assembled Links to Projects Cited in the Speakers' Remarks*

Discussant: **Myron Beasley**, Associate Professor of American Studies, Bates College

Speakers: **Betsy Andersen**, Executive Director, Museo Eduardo Carrillo
Christa Blatchford, Executive Director, Joan Mitchell Foundation
Sasha Davis, Executive Director, The Renee and Chaim Gross Foundation

Nellie Scott, Director, Corita Art Center

Elizabeth Smith, Executive Director, Helen Frankenthaler Foundation

Miwako Tezuka, Associate Director, Arakawa+Gins Reversible Destiny Foundation

Projects: Small But Impactful

The Renee and Chaim Gross Foundation

- Educating About Artist-Immigrants to Honor a Centennial
- <https://www.rcgrossfoundation.org/centennial#tab:thumbnails>

Arakawa+Gins Reversible Destiny Foundation

- Convening Artists & Scholars to Consider How to Live Post-COVID
- <http://www2.kansai-u.ac.jp/agx2022/index.php#join>

Museo Eduardo Carrillo

- Networking a Region to Shine a Spotlight on Latinx Art & Senior Artists
- <https://museoeduardocarrillo.org/category/news/califas-legacy/>

Stepping Up to Meet a Need

Joan Mitchell Foundation

- Updating a Key Strategy for Artists' Support
- <https://www.artforum.com/news/joan-mitchell-foundation-launches-new-artist-fellowship-84989>

Corita Art Center

- Claiming Space for Women Artists on the Landmarks List
- <https://www.latimes.com/entertainment-arts/story/2021-06-04/corita-kent-studio-receives-los-angeles-monument-status-rare-achievement-for-woman-artist>

Helen Frankenthaler Foundation

- Spearheading a New Grantmaking Focus: Climate Change
- <https://www.theartnewspaper.com/2021/07/28/helen-frankenthaler-foundation-announces-its-first-round-of-climate-grants-to-art-institution>

12:45 PM

II. Plenary III Fiduciary Duty - Serving as an Artist's Executor/Trustee With a Foundation Beneficiary

Question: It is Increasingly Common That Individuals Whom Artists Intend to Play Key Roles in Their Foundation Posthumously are also Asked to Serve as the Artist's Executor or Trustee. What are the Considerations in Accepting this Responsibility? *Note: Speakers Are Not Providing Legal Advice.*

Readings: ABA - *Guidelines for Individual Executors and Trustees*
Appraisal Institute - *IRS Definition of Qualified Appraiser*
Lanza - *Blockage Discounts and Artists Estates*
Risk Strategies (DeWitt Stern) - *The AEF Insurance Handbook*
UOVO - *Effective Practice in Art Collection Management and Storage*

Moderator: **Stephen K. Urice**, Professor of Law, University of Miami School of Law, and AEFI Advisor

Speakers: **Caryn Young**, Member, New York State Bar Association Estate &

Trust Administration Committee

April Johnson, Senior Association Director, Business Development,
UOVO (AEFI Lead Underwriter)

Edward Yee, Executive Committee Member, Appraisers Association

Mary Pontillo, Senior Vice President Fine Arts, Risk Strategies
(AEFI Lead Underwriter)

1:45 PM

Concurrent Opportunities

- Session Roundtables: Discuss the Issues
 - ♦ Session 4A: Western States AEFs Convene, Hosted by the Sam Francis Foundation & Mike Kelley Foundation for the Arts
 - ♦ Session 4B: topic tbd
 - ♦ Session 4C: topic tbd
- Connect: One-on-One Video Meet-Ups
- Networking: Meet New Colleagues
- EXPO: Explore Professional Partners
- Optional Screen Break: Lunch/Coffee/Stretch

2:45 PM

12. Spotlight on Sustainability - Its Always Time for Succession Planning

Question: The AEF Community is a Relatively Young, Fast-Growing Field, but Many of its Senior Leaders are Advancing in Age, Having Been Personally Chosen by The Long-Deceased Founding Artists or Early Boards. Succession Planning is Often Not on the Minds of Leaders and Board Members Until an Urgent Event Takes Place. In Addition, for Many Foundations Wishing to Attend to This Crucial Matter, it isn't Clear How to Begin. What Should AEF Leaders Do?

Readings: Haile - *Guide to Nonprofit Succession Planning*
Rubenstein - *Draft Notes From Survey Re: AEF Succession Planning Practice*

Moderator: **Chaya Scott**, Vice President, Nonprofit Finance Fund

Speakers: **Mayret Rubenstein**, Forum Intern
Susan Larsen, Executive Director, The Dorothea & Leo Rabkin Foundation
Amy Haile, Author, *Guide to Nonprofit Succession Planning*

3:15 PM

13. Spotlight on Cyber Security

Question: AEFs are as Vulnerable to Fishing and Ransomware Attacks as any Organization or Business. They Hold Sensitive Data on Employees as Well as, in Some Cases, Financial Contributors and Sales-Related Records. They also Maintain Privacy-Sensitive Assets Whose Public Release Would Have Major Ramifications for the Organization's Reputational Credibility, for Example, Files With Data on Private Individuals Who Own the Respective Artist's Works and Have Contributed Confidential Information for Purposes of Provenance Research. How Can AEF Leaders Protect Their Foundations Against Cyber Risk?

Readings: Aspen Digital - *Practical Guide to Elevated Cyber-Security Risks*
CISA - *Cyber Essentials Tool Kit*
Cyber Collective - *Cyber Security Worksheet*

Ellis - *Making an Incident Response Plan*
Stanford PACS - *Data Inventory Sheet*

Moderator: **R. Taj Moore**, Director, Aspen Cyber Security Group, Aspen Institute

Speakers: **Morgan Spangle**, Executive Director, Dedalus Foundation
Tazin Khan Norelius, Cyber Security Specialist and Founder, Cyber Collective
Kathleen Curley, National Cyber Practice Director, Risk Strategies (AEFI Lead Underwriter)

3:45 PM

14. Plenary IV Closed Door Conversation - AEFs and Artists Diagnosed With Dementia - Ask the Experts

Conversation and Audience Q&A are Confidential

Question: The Issue of Foundations Associated With Living Artists Diagnosed With Dementia is a "Below The Radar" But Fast-Growing Concern for the AEF Community. How Does This Situation Influence All Manner of Factors That Ultimately Will Bear on The Foundation's Long-Term Art Stewardship Role? Questions Were Gathered Confidentially From AEF Leaders And Presented to the Speakers In Advance. *Note: Speakers Are Not Providing Legal Advice.*

Readings: Cornell Legal Information Institute: Definitions - *Guardianship, Conservatorship, Power of Attorney*
Mayo Clinic: *Dementia - Symptoms*
Stevens and Swan: *Dementia and Epilogue, de Kooning an American Master* (Knopf 2004)

Moderator: **Stephen K. Urice**, Professor of Law, University of Miami School of Law, and AEFI Advisor

Speakers: **Elizabeth Adinolfi**, Co-Chair, New York State Bar Association Guardian Committee/Elder Law Section
Diana Wierbicki, Chair, New York City Bar Art Law Committee
Megan Fox Kelly, President, Association of Professional Art Advisors
Amarah Sedreddine, Co-Chair, New York City Bar Committee on Nonprofit Organizations

4:45 PM

14. Summary Reflections on the Day

Question: What Key Takeaways and Important Points Raised During the Day do a Group of AEF Leaders Whose Foundations are Diverse by Such Factors as Age, Art Medium, and Artist, Wish to Share With Their Colleagues?

Respondents: **Michele Wallace**, President, Anyone Can Fly Foundation
Donna McNeil, Executive Director, Ellis-Beauregard Foundation
London Tsai, Executive Director, Tsai Art and Science Foundation

5:00 PM

Concurrent Opportunities (Continuing to 6:30 PM)

- Session Roundtables: Discuss the Issues
 - ♦ Session 5A: topic tbd
 - ♦ Session 5B: topic tbd
 - ♦ Session 5C: topic tbd

- Connect: One-on-One Video Meet-Ups
- Networking: Meet New Colleagues
- EXPO: Explore Professional Partners

5:30 PM **I6. Curator-Led Tour - Virginia Museum of Fine Arts**

Exhibition: *The Dirty South: Contemporary Art, Material Culture, and the Sonic Impulse*

Question: This Groundbreaking Exhibition Investigates Southern Black Culture's Influences on American Art, Music, and Other Forms of Cultural Expression. What Can We Learn From This Exhibition About the Visual Expression of the African American South and Black Sonic Culture, Overlooked Tributaries to the Development of Art in The United States as Well as Interlocutors of American Modernism?

Readings: Cotter - *Art Meets its Soundtrack Deep in "The Dirty South"*

Introduction: **Michael R. Taylor**, Chief Curator and Director for Art and Education, Virginia Museum of Fine Arts

Curator-led Tour: **Valerie Cassell Oliver**, Sydney and Frances Lewis Family Curator of Modern and Contemporary Art, Virginia Museum of Fine art

6:30 PM **2022 Forum Concludes**



CHARLIE BERGMAN KEYNOTE CONVERSATION FEATURED GUESTS



Photo Credit: The Economist

Theaster Gates is an artist and social innovator who lives and works in Chicago. Over the past decade, Gates has demonstrated the intricacy of Blackness through space theory and land development, sculpture, and performance. In 2010, Gates created the Rebuild Foundation, a nonprofit platform for art, cultural development, and neighborhood transformation that supports artists and strengthens communities through free arts programming and innovative cultural amenities in the Grand Crossing neighborhood of the South Side of Chicago. Gates is a professor at the University of Chicago in the Department of Visual Arts and serves as Special Advisor to the President for Arts Initiatives.



Photo NEA/ David K. Riddick

Maria Rosario Jackson is the 13th chair of the National Endowment for the Arts and the first African American and Mexican American woman appointed to that role. Dr. Jackson's career has focused on understanding and elevating arts, culture, and design as crucial elements of healthy and equitable communities. A planner, researcher, and academic, Dr. Jackson is a tenured professor on leave from Arizona State University, where she led the Studio for Creativity, Place and Equitable Communities. For almost ten years, she served as a senior advisor on arts and culture and strategic learning, research, and evaluation at the Kresge Foundation and has advised other foundations. For 18 years, Dr. Jackson worked at the Urban Institute in Washington, DC, where she was the founding director of the Culture, Creativity and Communities Program.



NON-AEF GUEST SPEAKERS AND MODERATORS

Elizabeth Adinolfi, co-chair of the New York State Bar Association Guardianship Committee, is a partner at Phillips Nizer LLP law firm in New York City.

Bruce Altshuler is the founding and now former director of the Museum Studies Program at New York University and a former executive director of The Isamu Noguchi Foundation and Garden Museum.

Myron Beasley is Associate Professor in American Studies at Bates College where his research explores the intersection of cultural politics, material culture, artistic creativity, and social change. He is a board member of the Surf Point Foundation in York, Maine.

Kathleen Curley is National Cyber Practice Director at Risk Strategies where she works with business and nonprofit leaders to help manage cyber risk in the ever-changing online environment. Risk Strategies is an AEFI Lead Underwriter.

Katarina Feder is Vice President and Director of Business Development at Artists Right Society(ARS), New York, representing the rights and permission interests of over 80,000 artists. ARS is an AEFI Lead Underwriter.

Amy Haile is the author of *Guide to Succession Planning for Nonprofit Organizations* and serves as CEO of Tampa Bay's Champions for Children social service organization.

Samuel Hoi is President of Maryland Institute College of Art in Baltimore, the oldest continuously degree-granting college of art in the United States.

April Johnson is Associate Director of Business Development at UOVO, the fine art storage and collections management firm in Long Island City, New York. UOVO is an AEFI Lead Underwriter.

Megan Fox Kelly, President of the Association of Professional Art Advisors, is a professional art advisor who builds and manages collections for individuals, museums, estates, and foundations.

Ethan Lasser, the John Moors Cabot Chair, Art of the Americas, at the Museum of Fine Arts, Boston, is a specialist in early American Art and leads the curatorial team for the *Philip Guston Now* exhibition.

Edward Lee, Co-Director, Program in IP Law, Chicago-Kent College of Law, Illinois Institute of Technology, researches the ways that the internet, technology, and globalization challenge existing legal paradigms.

Sandy S. Lee, Adjunct Professor, Master in Visual Arts Administration program, New York University, leads the program's art markets seminar, works on issues across finance, tech, and art, and is a board member of the Joan Mitchell Foundation.

R. Taj Moore, Director, Aspen Cyber Security Group, the Aspen Institute, has worked as an attorney on cyber security matters in the private sector as well as in state and national government agencies.

Kate Nesin is an adjunct curator, contemporary art, at the Museum of Fine Arts Boston where she is a member of the curatorial team for the *Philip Guston Now* exhibition.

Tazin Kahn Norelius, a cyber security specialist based in Brooklyn, is founder of Cyber Collective, a nonprofit educating people about the impact of technology in their lives and how to protect themselves in the online environment.

Alex Nyerges, Director and Chief Executive Officer, Virginia Museum of Fine Arts, Richmond, is a photography curator, author, and historian, and a studio photographer in his own right.

Valerie Cassell Oliver, Sydney and Frances Lewis Family Curator of Modern and Contemporary Art at the Virginia Museum of Fine Arts, received the 2022 Bard Curatorial Center's Audrey Irmas Award for Curatorial Excellence for *The Dirty South: Contemporary Art, Material Culture, and the Sonic Impulse*.

Mary Pontillo, Senior Vice President and National Fine Arts Practice Leader at Risk Strategies in New York city, specializes in insurance needs and risk management for artist-endowed foundations, artists' studios, and museums. Risk Strategies is an AEFI Lead Underwriter.

Mayret Rubenstein, Intern for the 2022 AEF Leadership Forum, is a student in the Arts Management track of the Masters in Arts History program at Tyler School of Art & Architecture, Temple University, in Philadelphia.

Chaya Scott is a Vice President at the Nonprofit Finance Fund, New York City, where she consults with clients across the nonprofit sector to ensure they have the knowledge and financial resources required to meet their missions.

Amarah Sedreddine, Co-Chair, New York City Bar Committee on Nonprofit Organizations, is a founding partner of the New York City law firm, Sedreddine+Whoriskey.

Franklin Sirmans, Director, Pérez Art Museum Miami, is a board member of The Andy Warhol Foundation for the Visual Art and the Adolph and Esther Gottlieb Foundation and served formerly on the board of Artists' Legacy Foundation. He is an AEFI Advisor.

Michael R. Taylor, a scholar of Dada and Surrealism, is Chief Curator and Deputy Director for Art and Education at the Virginia Museum of Fine Arts in Richmond.

Matthew Teitelbaum, the Ann and Graham Gund Director of the Museum of Fine Arts, Boston, is the Museum's 11th director in its 150+-year history and is a past president of the Association of Art Museum Directors.

Stephen K. Urice, Professor of Law at University of Miami School of Law, is a nationally recognized expert on the legal dimensions of cultural policy, museum administration, cultural heritage preservation, cultural philanthropy, and trusts and estates. He is an AEFI Advisor.

Terence Washington is a guest curator at the Museum of Fine Arts Boston where he is a member of the curatorial team for the *Philip Guston Now* exhibition.

Diana Wierbicki, Chair, New York City Bar Art Law Committee, is a partner at withersworldwide leading the firm's global art practice, based in its New York City office.

Edward Yee, Member, Executive Committee, Appraisers Association, is the primary appraiser for Penelope Dixon & Associates in New York City, overseeing all appraisal assignments.

Caryn Young, Member, New York State Bar Association Estate & Trust Administration Committee, is a partner at withersworldwide based in its New York City office.

PARTICIPANT GUIDELINES

The 2022 Artist-Endowed Foundation Leadership Forum, Tuesday and Wednesday, May 24 and 25, is presented by the Aspen Institute Artist-Endowed Foundation Initiative (AEFI) and hosted virtually by the Museum of Fine Arts, Boston and the Virginia Museum of Fine Arts, respectively. The event is designed to facilitate collegial exchange and mutual learning on issues and innovations in policy and practice among senior leaders of artist-endowed foundations, inform AEFI's research, publication, and knowledge-sharing programs, and introduce new colleagues into the AEF community's learning conversation, all with the mission to strengthen the charitable impact of the emerging artist-endowed foundation field in its art stewardship and cultural philanthropy roles. The following participant guidelines support that mission. By registering, participants agree to comply with these guidelines.

Eligibility The 2022 AEF Leadership Forum is an invitational symposium exclusively for senior leaders of artist-endowed foundations, such as executive staff and members of the governing board. Graduates of AEFI's annual Seminar on Strategy for Artist-Endowed Foundation Leaders also are invited. All invitations to the 2022 AEF Leadership Forum are nontransferable and made at the sole discretion of AEFI.

Educational Acknowledgment All AEFI programs, including the 2022 AEF Leadership Forum, are strictly educational and informational in nature and do not purport to provide legal advice or professional guidance to particular individuals, organizations, or situations. All participants acknowledge that the 2022 AEF Leadership Forum, and the individuals serving as panelists, moderators, and speakers for the program, are providing educational and informational content exclusively and are not providing legal advice or professional guidance, and that Forum participants are responsible for securing the necessary qualified legal and professional advice required specifically by themselves and their organization.

Code of Conduct

- Collegial Respect: *All participants in the 2022 AEF Leadership Forum will conduct themselves in a respectful and professional manner, bringing credit to their organization and to the program and its presenter, cooperating partners, and host.*
- Confidentiality: *To ensure the type of frank commentary that is essential for collegial learning, certain parts of the day will be conducted as confidential, closed-door sessions; all remarks by panelists as well as audience questions and discussions are confidential.*
- Non-Solicitation: *The 2022 AEF Leadership Forum is a non-solicitation environment. Accordingly, fundraising and business solicitation are not permitted.*
- Social Media: *The Forum is a private event. Filming, recording, blogging, tweeting, or posting from the Forum is prohibited.*

Forum Participant List To facilitate collegial exchange, participants in the 2022 AEF Leadership Forum will be provided a list of registered participants along with their contact information. This list is to be used solely by the participant and exclusively to contact other participants and is not to be distributed or used in any other way. Please send an email to vincent.christine@gmail.com upon registration to exclude information.

Refund Policy No registration fee refunds will be issued after April 26. To cancel participation prior to this date, please send an email to vincent.christine@gmail.com. A \$25 processing fee will be charged on all refunds.

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Artist-Endowed Foundations Initiative/AEFI

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Aspen Institute Artist-Endowed Foundations Initiative/AEFI

Conducting Research, Publication, and Educational Programs to Strengthen the Charitable Impact of the Emerging Artist-Endowed Foundation Field in Art Stewardship and Cultural Philanthropy
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The Museum of Fine Arts, Boston, is one of the most comprehensive art museums in the world, with a collection that exemplifies the breadth, richness, and diversity of artistic expression, from prehistoric times to modern day.
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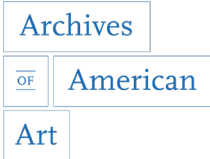
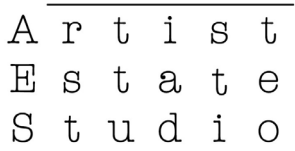
Virginia Museum of Fine Arts

The Virginia Museum of Fine Arts is a state-supported, privately endowed educational institution created for the benefit of the citizens of the Commonwealth of Virginia with a purpose to collect, preserve, exhibit, and interpret art, to encourage the study of the arts, and thus to enrich the lives of all.
<https://vmfa.museum/>



FORUM EXPO EXHIBITORS

AEFI is pleased to feature a curated collection of professional firms and nonprofit organizations that provide valuable services to the AEF community. These firms have been invited to participate in the 2022 Forum EXPO based on recommendations by satisfied clients as well as their ability to help the AEF community solve important problems and meet critical needs that influence foundations' charitable impact. Please welcome, explore, and learn from the Forum's EXPO exhibitors.

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**Conducting Research, Publication, Education, and Leadership Programs to Strengthen
the Charitable Impact of the Emerging Artist-Endowed Foundation Field**

www.aspeninstitute.org/aei

AEFI OVERVIEW

The Aspen Institute Artist-Endowed Foundations Initiative/AEFI evolved from what is now its principal research component—the National Study of Artist-Endowed Foundations. The Study 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, as well as a cross section of the artist-endowed foundation community. Realizing this young field’s potential to substantially expand the nation’s cultural philanthropy resources, and observing its swift growth and increasingly influential role in art stewardship, these donors envisioned a research project to document and disseminate effective practices as a strategic intervention at a key juncture in the field’s emergence.

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 emerging field’s charitable impact in cultural philanthropy and art stewardship by filling the significant information gap facing individuals involved in creating, leading, governing, and advising foundations. To this end, AEFI conducts ongoing programs to develop and share knowledge with key audiences. These programs and their participants comprise:

- **Research and Publications**, including AEFI’s National Study of Artist-Endowed Foundations; regular Study Report Supplements and Updates, most recently *Study Report Supplement 2018*; 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 are used by artists; artists’ families, associates, and advisors; foundation leaders; policymakers; journalists; scholars; educators; and students.
- **Knowledge-Sharing Events**, such as 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; 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, Los Angeles County Museum of Art, Harvard Art Museums, Fine Arts Museums of San Francisco, Graham Foundation for Advanced Studies in the Visual Arts, and the Clark Art Institute, among others.
- **Education and Leadership Programs**, specifically the Seminar on Strategy for Artist-Endowed Foundation Leaders, assisting the professional development of foundation leaders and those supporting artists’ legacy planning efforts, and the Artist-Endowed Foundation Leadership Forum, fostering exchange among 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.

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, Ford Foundation, and as President, Maine College of Art.

AEFI's work is supported by the staff and colleagues of the Aspen Institute Program on Philanthropy and Social Innovation and by the staff of the many cultural and educational institutions and AEFs who partner with AEFI to realize its programs. AEFI's research, publications, and education programs are 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.

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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 whomever 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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