

**ARTIST-ENDOWED
FOUNDATIONS
INITIATIVE**

PHILANTHROPY & SOCIAL INNOVATION

 aspen institute

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**ARTIST-ENDOWED
FOUNDATION
LEADERSHIP FORUM**

— HOSTED BY —
CHEECH MARIN CENTER FOR CHICANO
ART & CULTURE | RIVERSIDE ART MUSEUM
WHITNEY MUSEUM OF AMERICAN ART

ISSUES & INNOVATIONS IN PRACTICE & POLICY

An Invitational Symposium for
Senior Leaders of Artist-Endowed Foundations
Wednesday, April 24 and Thursday, April 25, 2024

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PHILANTHROPY & SOCIAL INNOVATION



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ISSUES & INNOVATIONS IN PRACTICE & POLICY

AN INVITATIONAL SYMPOSIUM FOR
SENIOR LEADERS OF ARTIST-ENDOWED FOUNDATIONS
WEDNESDAY, APRIL 24, 2024
THURSDAY, APRIL 25, 2024
11:00AM TO 5:30PM EASTERN TIME



FORUM PRESENTING PARTNER 2024



UOVO

AEFI LEAD UNDERWRITERS



VIRTUAL 2024 AEF LEADERSHIP FORUM: PROGRAM OVERVIEW		
ZONE: EST	Wednesday, April 24 th Host: Whitney Museum of American Art	Thursday, April 25 th Host: The Cheech Riverside Art Museum
11:00 AM	CONCURRENT OPPORTUNITIES: ▪ Expo: Explore Professional Partner Booths ▪ Meet-Ups by Roles & Regions ▪ First-Time Forum Participants ▪ Seminar Alums ▪ AEF Board Members ▪ AEF Archivists/Registrars	CONCURRENT OPPORTUNITIES: ▪ Expo: Explore Professional Partner Booths ▪ Meet-Ups by Roles & Regions ▪ Western States AEFs ▪ New England AEFs ▪ International AEFs ▪ Consortium Intern/Fellow Alums
12:00 PM	WELCOME & OVERVIEW OF THE DAY	AEFI UPDATE & OVERVIEW OF THE DAY
12:30 PM	KEYNOTE CONVERSATION <i>CONSIDERING AI: Its Potential as a Resource for Art Scholarship and Charitable Practice</i>	KEYNOTE SESSION <i>THE SHIFTING LEGAL CLIMATE: Hiring and Grantmaking to Advance DEAI</i>
1:30 PM	SPOTLIGHT ON PRACTICE <i>CONSIDERING AI: Its Potential as a Risk, Policy & Litigation Update</i>	SPOTLIGHT ON PRACTICE <i>2023 Intern/Fellow Alums, The AEF Consortium Advancing Next-Gen Leaders in the Visual Arts</i>
2:00 PM	CONCURRENT OPPORTUNITIES: ▪ Networking: Meet New Colleagues ▪ Expo: Explore Professional Partner Booths ▪ Bio Break: Hydration/Stretch/Relief	CONCURRENT OPPORTUNITIES: ▪ Networking: Meet New Colleagues ▪ Expo: Explore Professional Partner Booths ▪ Bio Break: Hydration/Stretch/Relief
2:30 PM	PLENARY SESSION <i>DIGITAL ARCHIVES: Balancing Access With Privacy Laws & Ethics</i>	PLENARY CLOSED DOOR CONVERSATION <i>GOVERNANCE: Board Fiduciary Duties, Ethics, & Legal Regulations - Ask the Experts</i>
3:30 PM	COLLEGIAL ROUNDTABLES ON PRACTICE ▪ <i>Engaging Grantees to Build Community & Impact</i> ▪ <i>Working With Art Advisors on Art Market Strategy</i> ▪ <i>Celebrating the Artist's Centennial - Why? How?</i> ▪ <i>Planning a Catalogue Raisonné Project</i> ▪ <i>Curating a Digital Portal With Bloomberg Connects</i>	COLLEGIAL ROUNDTABLES ON PRACTICE ▪ <i>Supporting Climate Action - Lessons & Opportunities</i> ▪ <i>Secondary Sale Royalties in Foundation-Gallery Relations</i> ▪ <i>Succession Planning in Collection Management</i> ▪ <i>Insuring/Securing Collections Strategically</i> ▪ <i>Connecting With Native Artists & Communities</i>
4:00 PM	SUMMARY REFLECTIONS ON THE DAY	SUMMARY REFLECTIONS ON THE DAY
4:15 PM	CONCURRENT OPPORTUNITIES (to 5:30 PM): ▪ Networking: Meet New Colleagues ▪ Expo: Explore Professional Partner Booths ▪ Bio Break: Hydration/Stretch/Relief	CONCURRENT OPPORTUNITIES (to 5:30 PM): ▪ Networking: Meet New Colleagues ▪ Expo: Explore Professional Partner Booths ▪ Bio Break: Hydration/Stretch/Relief
4:45 PM	Curator-Led Tour: <i>Jaune Quick-to-See Smith: Memory Map</i> Whitney Museum of American Art	Curator-Led Tour: <i>Cheech Collects</i> The Cheech Marin Center for Chicano Arts & Culture Riverside Art Museum
5:30 PM	2024 FORUM'S FIRST DAY CONCLUDES	2024 AEF LEADERSHIP FORUM CONCLUDES



As Artist-Endowed Foundations continue to navigate the many crosscurrents that mark this moment in our culture and democracy, it is essential that their leaders come together as a learning community in collegial exchange and mutual support. The virtual 2024 AEF Leadership Forum will convene senior staff and board leaders of AEFs, as well as graduates of the Seminar on Strategy for AEF leaders, to take the measure of these times. Chief among the community's many concerns is the evolving impact of technology as an opportunity as well as a risk and the shifting legal climate around Diversity, Equity, Access, and Inclusion (DEAI) as it impacts foundation hiring and grantmaking for diversity.

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 opportunities in practice and policy influencing their work in cultural philanthropy and art stewardship;
- Building a shared body of knowledge about effective practice;
- Introducing new foundation leaders into the community's conversations and network; and
- Informing the research, publication, professional education, and leadership programs of the Aspen Institute Artist-Endowed Foundations Initiative | AEFI.

The Forum is based on the belief that the AEF community as a whole 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 particular concerns, and, as such;
- Leaders are able to serve as resources for the broader community's advancement, contributing their knowledge to artists, artists' family members, and new artist-endowed foundations.



KEYNOTE CONVERSATION FEATURED GUESTS



Photo: University of Pittsburgh

Alison Langmead holds a joint faculty appointment between the Dietrich School of Arts and Sciences and the School of Computing and Information at the University of Pittsburgh. She teaches and researches in the field of the digital humanities, focusing especially on applying digital methods mindfully within the context of visual and material culture studies.

For the Department of Art History and Architecture, Alison serves as the Director of the Visual Media Workshop (VMW) with a mission to develop and encourage the creation of innovative methods for producing, disseminating, and preserving the academic work using digital technologies as a fundamental component of our scholarly toolkit.

For the School of Computing and Information (SCI), Alison researches the relationship between the historical practice of information management and digital computing, both as a historical narrative and also as a complex, changing process in contemporary America.



Photo: Association of Art Museum Curators

David Newbury is assistant director, Software and User Experience, at Getty, where he works with museum professionals, researchers, scientists and technologists to find solutions to technical and scholarly problems. David has also worked on Art Tracks, a provenance project at the Carnegie Museum of Art, and the American Art Collaborative, working with 14 museums on standardizing models and software around Linked Data. David has also worked with organizations such as Carnegie Mellon University, University of British Columbia, University of Illinois, and PBS.

SCHEDULE

Wednesday, April 24, 2024

Eastern Time

11:00 AM **CONCURRENT OPPORTUNITIES**

- EXPO: Explore Professional Partner Booths
- Meet-Ups by Roles & Regions:
 - First-Time Forum Participants
 - Seminar on Strategy Alums
 - AEF Board Members
 - AEF Archivists & Registrars

12:00 PM **1. WELCOME AND OVERVIEW OF THE DAY**

Welcome on Behalf of:

Whitney Museum of American Art

Scott Rothkopf, Alice Pratt Brown Director, Whitney Museum of
of American Art

Aspen Institute Artist-Endowed Foundations Initiative | AEFI

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

2024 AEF Leadership Forum Presenting Partner

Anan A. Samara, Principal, PKF O'Connor Davies LLP

2024 AEF Leadership Forum

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

12:30 PM **2. KEYNOTE CONVERSATION**

***CONSIDERING AI: Its Potential as a Resource for Art Scholarship and
Charitable Practice***

Question: How might Artificial Intelligence (AI) be a positive resource and useful tool
supporting the AEF community's activities in art history scholarship,
art stewardship, art education, and public engagement?

Readings: Nygren, Christopher, and Sonja Drimmer. 2023. "Art History and AI: Ten
Axioms". *International Journal for Digital Art History*, no. 9 (April):5.02-
5.13.

Conversant: **Alison Langmead**, Clinical Professor & Director, Visual Media
Workshop, History of Art & Architecture Program of the Dietrich
School of Arts & Sciences, and School of Computing & Information,
University of Pittsburgh

Interlocutor: **David Newbury**, Assistant Director, Software and User Experience,
Getty

1:30 PM	3. SPOTLIGHT ON PRACTICE <i>CONSIDERING AI: Its Potential as a Risk, Policy & Litigation Update</i> <u>Questions:</u> What risks does Artificial Intelligence (AI) represent to an AEF's art stewardship mission? What policy development initiatives and litigation are coming to bear on the opposing interests of copyright owners and technology companies claiming fair use of works widely available on the Web? <u>Readings:</u> Kang, Cecilia. The Sleepy Copyright Office in the Middle of a High-Stakes Clash Over AI, <i>The New York Times</i>, January 26, 2024. <u>Conversant:</u> Janet Hicks, Vice President & Director of Licensing, Artists Rights Society (AEFI Lead Underwriter) <u>Interlocutor:</u> Bhamati Viswanathan, Faculty Fellow, New England Law
2:00 PM	4. CONCURRENT OPPORTUNITIES • Networking: Meet New Colleagues • EXPO: Explore Professional Partner Booths • Optional Bio Break: Hydration/Stretch/Relief
2:30 PM	5. PLENARY SESSION <i>DIGITAL ARCHIVES: Balancing Access With Privacy Laws and Ethics</i> <u>Question:</u> Digitization and online publication of artists' archives, oral histories, and personal photographs held by AEFs enhances accessibility but raises questions about how to comply with laws and ethical standards designed to ensure the privacy of personally identifiable information (PII). What should AEF leaders consider? <u>Readings:</u> Behrnd-Klodt, Menzi L. Access and Privacy Materials Memo, April 2024. Chapter 6, <i>Archives and Privacy</i>, pp. 181 - 218 in Elena S. Danielson, <i>The Ethical Archivist</i>, Chicago: Society of American Archivists, 2010. <u>Moderator:</u> Hilary Wang, Digital Archivist, Special Collections, John Hay Library, Brown University <u>Speakers:</u> Menzi L. Behrnd-Klodt, Archival/Legal Consultant, Klodt & Associates Elena S. Danielson, Archivist Emerita, Hoover Institution Sara S. Hodson, Curator of Literary Manuscripts, ret., The Huntington Library
3:30 PM	6. COLLEGIAL ROUNDTABLES ON PRACTICE <u>Topic:</u> <i>Engaging Grantees to Build Community & Impact</i> Is making a grant a one-off, one-way transaction or can the impact of an AEF's grants be increased through strategies to build community and share learning among grantees? Roundtable Co-Hosts: Solana Chehtman, Director of Artist Programs, Joan Mitchell Foundation Katy Rogers, Programs Director, Dedalus Foundation

Topic: ***Working With Art Advisors on Art Market Strategy***
How can AEF leaders work most productively with professional art advisors they retain to help evaluate and develop an art market strategy?

Roundtable Co-Hosts:
Helen McNeil-Ashton, Co-Trustee, George McNeil Charitable Trust
Steven Rose, Executive Director/President, Emily Mason | Alice Trumbull Mason Foundation

Topic: ***Celebrating the Artist's Centennial - Why? How?***
How can AEFs advance their charitable purposes to educate about and increase public access to their artist's oeuvre by recognizing the artist's centennial?

Roundtable Co-Hosts:
Debra Burchett-Lere, Executive Director, Sam Francis Foundation
Andrea Liguori, Executive Director, The Richard Diebenkorn Foundation

Topic: ***Planning a Catalogue Raisonné Project***
What are the key considerations in planning a successful Catalogue Raisonné project?

Roundtable Co-Hosts:
Douglas Dreishpoon, Director, Helen Frankenthaler Catalogue Raisonné
Tracee Ng, Vice President, Catalogue Raisonné Scholars Association

Topic: ***Curating a Digital Portal With Bloomberg Connects***
How can AEFs enhance their public engagement and education strategies via a partnership with this global cultural access app?

Roundtable Co-Hosts:
Jennifer Lorch, Deputy Director, The Isamu Noguchi Foundation & Garden Museum
Andrea Walsh, Senior Director of Content & Communications, Judd Foundation

Roundtable Resource Guest:
David Strauss, Global Partnerships Lead, Bloomberg Connects

4:00 PM **7. SUMMARY REFLECTIONS ON THE FORUM'S FIRST DAY**

Question: What was the most significant piece of knowledge shared, the most surprising discovery, or the most useful new idea of the day?

Speakers: **Caroline Black**, Executive Director, The Pollock-Krasner Foundation
Shahrzad Kamel, Executive Director, June Leaf & Robert Frank Foundation
Antonio David Lyons, Board President, Valerie J. Maynard Foundation

4:15 PM **8. CONCURRENT OPPORTUNITIES (Continuing to 5:30 PM)**

- Networking: Meet New Colleagues
- EXPO: Explore Professional Partner Booths
- Optional Bio Break: Hydration/Stretch/Relief

4.45 PM

9. CURATOR-LED TOUR

Whitney Museum of American Art

Exhibition: *Jaune Quick-to-See Smith: Memory Map*

Question: What were the curatorial considerations in creating this exhibition, the first New York retrospective of Jaune Quick-to-See Smith (b. 1940, citizen of the Confederated Salish and Kootenai Nation)?

Curatorial: **Laura Phipps**, Associate Curator, Whitney Museum of American Art

Guest: **Jaune Quick-to-See Smith**

5:30 PM

10. Conclusion of the 2024 Forum's First Day

SCHEDULE

Thursday, April 25, 2024
Eastern Time

11:00 AM **CONCURRENT OPPORTUNITIES**

- EXPO: Explore Professional Partner Booths
- Meet-Ups by Roles & Regions:
 - Western States AEFs
 - New England AEFs
 - Consortium Intern/Fellow Alums

12:00 PM **11. WELCOME, AEFI UPDATE, AND OVERVIEW OF THE DAY**

Welcome on Behalf of:

Cheech Marin Center for Chicano Art & Culture | Riverside Art Museum

Drew Oberjuege, Executive Director, The Cheech | Riverside Art Museum

2024 AEF Leadership Forum

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

12:30 PM **12. KEYNOTE SESSION**

THE SHIFTING LEGAL CLIMATE: Hiring & Grantmaking to Advance DEAI

Question: What do AEF leaders need to understand about the shifting legal climate impacting hiring for diversity (including interns and fellows) and making grants to advance diversity?

Readings: AEFI. Understanding the Changing Interpretation of Laws Regulating Hiring and Employment for DEAI, Draft Memo, November 17, 2023.

Daniels, Alex. The Next Test of the Supreme Court's Affirmative Action Decision, *Chronicle of Philanthropy*, January 2024.

Moderator: **Jill S. Manny**, Executive Director, National Center on Philanthropy and the Law, NYU

Speakers: **Kimberly Eney**, Vice Chair, ABA Exempt Organizations Committee, Partner, Loeb & Loeb, Nonprofits & Tax-Exempt Organizations Practice
Sarina Saluja, Partner, Loeb & Loeb, Employment & Labor Practice

1:30 PM **13. SPOTLIGHT ON PRACTICE**

2023 INTERN/FELLOW ALUMS: The AEF Consortium Advancing Next-Gen Leaders in the Visual Arts

Questions: What can we learn from four college students with backgrounds under-represented in the visual arts who were hosted as interns during the summer of 2023 by Artist-Endowed Foundations participating in the AEF Consortium Advancing Next-Gen Leaders in the Visual Arts?

Moderator: **Linda Earle**, AEFI Advisor, and Associate Graduate Director, Arts Management MA, ret., Tyler School of Art & Architecture, Temple University

Speakers: **Randa Elsayed**, John Jay College of Criminal Justice, Macaulay Honors College, BA 2024
Norman Godinez, Columbia University, BA 2024
Infiniti Robinson, SUNY Oswego, BA 2024
Jaiden Sanchez, New York University, BA 2023

2:00 PM **14. CONCURRENT OPPORTUNITIES**

- Networking: Meet New Colleagues
- EXPO: Explore Professional Partner Booths
- Optional Bio Break: Hydration/Stretch/Relief

2:30 PM **15. PLENARY SESSION: CLOSED DOOR CONVERSATION**

GOVERNANCE: Board Fiduciary Duties, Ethics & Legal Regulations
Audience Q&A and Discussions are Confidential

Question: AEFs founders often select members of their inner circle to serve on a foundation's board. How can a parochial board evolve into one with good governance practices and a sufficient breadth of expertise to fulfill its fiduciary duties?

Readings: AEFI. Artist-Endowed Foundation Board Capacity Analysis Matrix, AEFI Seminar on Strategy for AEF Leaders, 2023.
Counts, Alex. Spotting and Fixing Dysfunctional Nonprofit Boards, *Stanford Social Innovation Review*, October 5, 2020.

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

Speakers: **Gayle Binney**, Manager of Board Relations, TIAA
Rose Chan Loui, Executive Director, Lowell Milken Center on Philanthropy & Nonprofits, UCLA School of Law

3:30 PM **16. COLLEGIAL ROUNDTABLES ON PRACTICE**

Topic: **Supporting Climate Action**
What factors influence grantees' success in undertaking climate action and what else needs to be done to address this pressing need?

Roundtable Co-Hosts:

Larissa Harris, Executive Director, Teiger Foundation

James Merle Thomas, Deputy Director, Helen Frankenthaler Foundation

Topic: **Secondary Sale Royalties in Foundation-Gallery Relations**
When are secondary-sale royalties likely to be part of the AEF-gallery partnership and can this practice be encouraged?

Roundtable Co-Hosts:

Leah Levy, Executive Director, The Jay DeFeo Trust

May Clare Stevens, Executive Director, Mike Kelly Foundation for the Arts

Topic: **Succession Planning in Collection Management**

What if an AEF's registrar/collections manager goes missing? How to ensure knowledge continuity in managing AEF collections.

Roundtable Co-Hosts:

Rachel Churner, Director, Carolee Schneemann Foundation

Christina Hunter, Executive Director, Nancy Graves Foundation

Resource Guest:

Dyani Feign, Director of Preservation Services, Conservation Center for Art & Historical Artifacts | CCAHA

Topic: **Insuring/Securing Collections Strategically**

How much insurance coverage does an AEF really need for its art collection? How can an AEF be strategic about its storage needs in light of minimizing risks, optimizing operating efficiencies, and understanding insurance impacts?

Roundtable Co-Hosts:

Eren Johnson, Archive & Collection Director, Harriet and Esteban Vicente Foundation

Nellie Scott, Executive Director, Corita Art Center

Resource Guests:

Mary Pontillo, Senior VP & National Fine Arts Practice Leader, Risk Strategies (AEFI Lead Underwriter)

Alexa Reid Smith, Director, Business Development, UOVO (AEFI Lead Underwriter)

Topic: **Connecting With Native Artists and Communities**

What have AEF leaders learned about engaging Native artists and communities, for new grant initiatives or ongoing programs?

Roundtable Co-Hosts:

Khadija Adell, Program Officer, The Andy Warhol Foundation for the Visual Arts

Julie Deamer, Executive Director, Harpo Foundation

4:00 PM

17. SUMMARY REFLECTIONS ON THE FORUM'S SECOND DAY

Question: What was the most significant piece of knowledge shared, the most surprising discovery, or the most useful new idea of the day?

Speakers: **Laura Bardier**, Executive Director, James Howell Foundation
Will Coleman, Inaugural Wyeth Foundation Curator & Director, Andrew & Betsy Wyeth Study Center
Lian Ladia, Director of Curatorial, Exhibitions, & Program, 500 Capp Street Foundation

4:15 PM **18. CONCURRENT OPPORTUNITIES** (Continuing to 5:30 PM)

- Networking: Meet New Colleagues
- EXPO: Explore Professional Partner Booths
- Optional Bio Break: Hydration/Stretch/Relief

4.45 PM **19. Curator-Led Tour - Cheech Marin Center for Chicano Art & Culture |
Riverside Art Museum**

Exhibition: *Cheech Collects*

Question: What does the second installment of the founding collection's inaugural exhibition tell us about The Chicano School of Art as it is envisioned by one of its foremost collectors?

Curatorial: **Maria Esther Fernandez.** Artistic Director, The Cheech Center for Chicano Art & Culture | Riverside Art Museum

Guest: **Cheech Marin,** Founder, The Cheech

5:30 PM **20. Conclusion of the 2024 Forum's Final Day**



NON-AEF GUEST SPEAKERS AND MODERATORS

Menzi L. Behrnd-Klodt, archival/legal consultant, Klodt & Associates, is an attorney, archivist, and archival educator, and served formerly as a corporate counsel for American Girl and Mattel.

Gayle Binney, Manager of Board Relations, TIAA, has held similar roles for the New York Public Radio and the New School, and is an educator on nonprofit governance.

Elena S. Danielson, Archivist Emerita, Hoover Institution, Hoover Library and Archives, writes and speaks widely about ethical issues in archiving.

Linda Earle, retired recently as associate graduate director, Arts Management MA, Tyler School of Art & Architecture, Temple University. She is an AEFI Advisor.

Randa Elsayed, John Jay College of Criminal Justice, Macaulay Honors College, BA 2024, was a 2023 intern in the grantmaking program of The Andy Warhol Foundation for the Visual Arts, a member of the AEF Consortium Advancing Nex-Gen Leaders in the Visual Arts.

Kimberly Eney, Vice Chair, ABA Exempt Organizations Committee, is a partner of Loeb & Loeb in the firm's Nonprofits & Tax-Exempt Organizations Practice.

Maria Esther Fernandez is the founding artistic director of The Cheech Center for Chicano Art & Culture | Riverside Art Museum.

Dyani Feign serves as director of preservation services at the Conservation Center for Art & Historical Artifacts | CCAHA

Norman Godinez, Columbia University, BA 2024, was a 2023 intern in the Communications Office of The Andy Warhol Foundation for the Visual Arts, a member of the AEF Consortium Advancing Nex-Gen Leaders in the Visual Arts.

Larissa Harris is the founding executive director of the Teiger Foundation, which supports contemporary visual art with a focus on curators.

Janet Hicks is vice president and director of licensing for Artists Rights Society. ARS is an AEFI Lead Underwriter.

Sara S. Hodson, Curator of Literary Manuscripts, ret., The Huntington Library, publishes and teaches on issues in archival practice, drawing on her many years of work with the archives of prominent cultural figures.

Alison Langmead, holds a joint appointment at the University of Pittsburgh as Clinical Professor and Director, Visual Media Workshop, History of Art & Architecture Program of the Dietrich School of Arts & Sciences, and the School of Computing & Information.

Rose Chan Loui, Executive Director, Lowell Milken Center on Philanthropy & Nonprofits, UCLA School of Law, leads this new central hub for education, thought leadership, and scholarship in law and policy related to philanthropy and nonprofit organizations.

Jill S. Manny is executive director of the National Center on Philanthropy and the Law, NYU, which explores legal issues affecting the nonprofit sector and examines the legal doctrines related to charitable organizations.

Cheech Marin, a celebrated comedian and founder, The Cheech Center for Chicano Art & Culture | Riverside Art Museum, is recognized as one of the foremost collectors of Chicano art.

David Newbury is assistant director, Software and User Experience, Getty, where he works with museum professionals, researchers, scientists and technologists to find solutions to technical and scholarly problems.

Tracee Ng, is vice president, Catalogue Raisonné Scholars Association, and has contributed to the Catalogue Raisonné projects focused on the sculptural works of David Smith and Tony Smith.

Drew Oberjuerge serves as executive director of The Cheech Marin Center for Chicano Art & Culture | Riverside Art Museum

Laura Phipps, Associate Curator, Whitney Museum of American Art, most recently curated the featured exhibition *Jaune Quick-to-See Smith: Memory Map*.

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

Scott Rothkopf is an American art historian and curator and in 2023 was appointed as Alice Pratt Brown Director, Whitney Museum of American Art.

Anan A. Samara, Partner, PKF O'Connor Davies LLP, specializes in accounting and advising services for private foundations, including artist-endowed foundations and art museums.

Jaune Quick-to-See Smith, acclaimed artist and long-time advocate for Native artists, is a citizen of the Confederated Salish and Kootenai Nation.

Alexa Reid Smith is 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.

Infiniti Robinson, SUNY Oswego, BA 2024, was a 2023 intern in the archive of the Roy Lichtenstein Foundation, a member of the AEF Consortium Advancing Nex-Gen Leaders in the Visual Arts.

Sarina Saluja is a partner of the law firm Loeb & Loeb in its Employment & Labor practice where she litigates on behalf of employers and counsels them on employment matters.

Jaiden Sanchez, New York University, BA 2023, was a 2023 intern in the grantmaking program of the Harpo Foundation, a member of the AEF Consortium Advancing Nex-Gen Leaders in the Visual Arts.

David Strauss, Global Partnerships Lead, Bloomberg Connects, is a longtime museum professional, including with leadership roles at the Queens Museum of Art.

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.

Bhamati Viswanathan, Faculty Fellow, New England Law, is a legal scholar and educator focusing on intellectual property law and emerging technologies.

Hilary Wang is digital archivist in the Special Collections of the John Hay Library at Brown University and has worked in archives at universities, art museums, and artist-endowed foundations.

PARTICIPANT GUIDELINES

The virtual **2024 Artist-Endowed Foundation Leadership Forum** will take place online Wednesday and Thursday, April 24 and 25, 2024. An invitational symposium, the event will convene senior staff and board leaders of Artist-Endowed Foundations nationally, as well as graduates of the Seminar on Strategy for AEF leaders, to discuss key issues and innovations in practice and policy that are influencing the field's charitable impact in art stewardship and cultural philanthropy as its members navigate this complex moment in our country's culture and democracy. The registration fee is \$350 per individual.

The event is presented online by the Aspen Institute Artist-Endowed Foundations Initiative | AEFI and will be hosted by the Cheech Marin Center for Chicano Art & Culture | Riverside Art Museum and the Whitney Museum of American Art.

The 2024 Forum will incorporate presentations, discussions, and networking among foundation leaders, scholars, experts, and thought leaders. The program's aim is to foster collegial exchange among the field's leaders, build a shared body of knowledge about effective practice, and introduce new foundation leaders into the community's conversations and network.

The following participant guidelines support this mission. By registering and attending the event, participants agree to comply with these guidelines.

Educational Acknowledgement

- *All AEFI programs, including the virtual 2024 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. **Participants in the virtual 2024 AEF Leadership Forum acknowledge that the program 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 participants are responsible for securing the necessary qualified legal and professional advice required specifically by themselves and their organizations.***

Code of Conduct

- *Collegial Respect: All participants in the virtual 2024 AEF Leadership Forum will conduct themselves in a respectful and professional manner, bringing credit to their organization and to the event and its presenters, cooperating partners, hosts, and sponsors. **AEFI is dedicated to providing a safe and welcoming educational 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 virtual 2024 AEF Leadership Forum are confidential, unless specifically indicated otherwise. If there is doubt on this point, participants are obliged to ask for clarification.***
- *Non-Solicitation: **The virtual 2024 AEF Leadership Forum is a non-solicitation environment. Fundraising and business solicitation are not permitted.***

- *Social Media*: The virtual 2024 AEF Leadership Forum is a private event. ***For security purposes and the confidentiality of participants, any filming, recording, blogging, tweeting, or posting from the event is prohibited.***
- *Expectations for Community Engagement*: The Aspen Institute's Community Agreement, setting out expectations for participants in its programs, are detailed here and should be reviewed by participants prior to the event - <https://www.aspeninstitute.org/communityagreement/>

Photo Release

- *AEFI will on occasion use photographs of virtual 2024 AEF Leadership Forum participants in its educational and informational materials and on the AEFI webpage - www.aspeninstitute.org/aeafi. All participants, by registering to participate in the virtual 2024 AEF Leadership Forum, acknowledge that they may be photographed and that the photographs may be used in AEFI's educational and information materials.*

Participant List

- *To facilitate collegial exchange, participants in the virtual 2024 AEF Leadership Forum 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 registration fee refunds will be made.***

Forum Staff

Forum Director

Christine J. Vincent, Managing Director
Artist-Endowed Foundations Initiative | AEFI

Forum Financial Administrator

Caroline Kiiru
PSI Manger of Finance & Administration

Forum Administrative Coordinator

Emily Imhoff
PSI Program Manager

Forum Interns

Infiniti Robinson
SUNY Oswego
BA 2024

Stephanie Tinsley
New York University
BA 2020



Forum Presenting Partner

PKF O'Connor Davies, LLP

Recognized as one of the nation's top firms providing accounting, auditing, tax, and management services with a special focus on private foundations, including artist-endowed foundations and museums.

<https://www.pkfod.com/>

Forum Hosts

Cheech Marin Center for Chicano Art & Culture | Riverside Art Museum

A path-breaking center of Chicano art, created by a partnership between Riverside Art Museum, the City of Riverside, and comedian Cheech Marin, one of the world's foremost collectors of Chicano art.

<https://riversideartmuseum.org/>

Whitney Museum of American Art

The preeminent museum devoted to collecting, preserving, interpreting, and exhibiting twentieth century and contemporary art of the United States, with a special focus on works by living artists.

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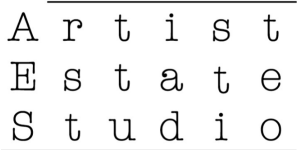
Conducting research, publication, educational, and leadership programs to strengthen the charitable impact of the emerging Artist-Endowed Foundation field in art stewardship and cultural philanthropy

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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 2024 Forum EXPO based on recommendations by satisfied AEF 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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the Charitable Impact of the Emerging Artist-Endowed Foundation Field

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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, 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, these donors envisioned a research project to document and disseminate effective practices as a strategic intervention in the field’s emergence.

AEFI’s mission is to increase the charitable impact of the Artist-Endowed Foundation community in its art-stewardship and cultural philanthropy activities. 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; briefing papers on critical issues; and targeted publications, such as *A Reading Guide to the Study Report for Artists and Their Family Members*.
- **Knowledge-Sharing Events**, such as workshops for potential foundation creators, including artists and their spouses/partners; 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.
- **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 Managing 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 & Design. AEFI’s work is supported by 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 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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