

**ARTIST-ENDOWED
FOUNDATIONS
INITIATIVE**

PHILANTHROPY & SOCIAL INNOVATION
 aspen institute

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

2025

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

SEMINAR ON STRATEGY *for* ARTIST-ENDOWED FOUNDATION LEADERS

February 25 – May 14, 2024

—
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
CORITA ART CENTER (CORITA KENT)
THE MIKE KELLEY FOUNDATION FOR THE ARTS
EMILY MASON | ALICE TRUMBULL MASON FOUNDATION
THE ISAMU NOGUCHI FOUNDATION & GARDEN MUSEUM
SURF POINT FOUNDATION (BEVERLY HALLAM)

RISK
strategies

UOVO

SEMINAR ON STRATEGY FOR ARTIST-ENDOWED FOUNDATION LEADERS

THANK YOU

On behalf of the Aspen Institute Artist-Endowed Foundations Initiative | AEFI and our Aspen Institute colleagues, I am pleased to extend a warm thanks for the support that has made possible the 2025 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:

CORITA ART CENTER (CORITA KENT)
THE MIKE KELLEY FOUNDATION FOR THE ARTS
EMILY MASON | ALICE TRUMBULL MASON FOUNDATION
THE ISAMU NOGUCHI FOUNDATION & GARDEN MUSEUM
SURF POINT FOUNDATION (BEVERLY HALLAM)

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

Lastly, we welcome the participants in the 2025 Seminar on Strategy for AEF Leaders and recognize them as leaders of the next generation of Artist-Endowed Foundations.

A handwritten signature in black ink that reads 'Christine J. Vincent'. The signature is fluid and cursive, with a prominent flourish at the end.

Christine J. Vincent
AEFI Managing Director
Seminar Director

2025 SEMINAR DATES - ALL SEMINAR ACTIVITIES TAKE PLACE ONLINE

Opening Reception: Tuesday, February 25

Opening Class: Wednesday, February 26

Course Sessions: Weekly on Wednesdays

Closing Class: Wednesday, May 14

Closing Celebration: Wednesday, May 14

2025 SEMINAR SCHEDULE OVERVIEW

Tuesday, February 25

5:00 – 6:30 PM ET

Opening Reception

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

Wednesday, February 26

1:00 – 3:00 PM ET

Seminar Opening Class

Introductions, Course Overview, Goals, Expectations

Wednesday, March 5

1:00 – 5:15 PM ET

Site Visit #1: Emily Mason | Alice Trumbull Mason Foundation

1. Legacy Stewardship and Artist-Endowed Foundations

Session 1.1 Foundation Basics

Session 1.2 Public Benefit

Wednesday, March 12

1:00 – 5:30 PM ET

Session 1.3 Fiduciary Duties

Session 1.4. Foundations and Insiders

Crosscutting Conversation: Foundation and Family

Module Review: Recap/Reflect

Wednesday, March 19

1:00 – 5:15 PM ET

Site Visit #2: Corita Art Center (Corita Kent)

2. Organizational Viability

Session 2.1 Governance

Session 2.2 Starting Up/Reorganizing

Wednesday, March 26

1:00 – 5:30 PM ET

Session 2.3 Art Market Strategy

Session 2.4 Business Model

Crosscutting Conversation: Long-term Stewardship Planning

Module Review: Recap/Reflect

2025 SEMINAR SCHEDULE OVERVIEW, CONTINUED

<u>Tuesday, April 2</u> 1:00 – 5:15 PM ET	Site Visit #3: Surf Point Foundation (Beverly Hallam) 3. <u>Cultural Asset Stewardship</u> Session 3.1 Art Collections Session 3.2 Archives
<u>Wednesday, April 9</u> 1:00 – 5:30 PM ET	Session 3.3 Oeuvre Scholarship Session 3.4 Intellectual Property Crosscutting Conversation: Oeuvre Management Module Review: Recap/Reflect
<u>Wednesday, April 16</u> 1:00 – 5:15 PM ET	Site Visit #4: The Mike Kelley Foundation for the Arts 4. <u>Philanthropic Impact</u> Session 4.1 Grantmaking Session 4.2 Support to Individuals
<u>Wednesday, April 23</u> 1:00 – 5:30 PM ET	Session 4.3 Museum Gifts and Charitable Sales Session 4.4 Educational and Public Programs Crosscutting Conversation: Foundation Termination Module Review: Recap/Reflect
<u>Wednesday, April 30</u> 1:00 – 5:15 PM ET	Site Visit #5: The Isamu Noguchi Foundation & Garden Museum 5. <u>Foundation Operations</u> Session 5.1 Professional Advisors Session 5.2 Risk Management
<u>Wednesday, May 7</u> 1:00 – 5:30 PM ET	Session 5.3 Foundation Planning Session 5.4 Digital Engagement Crosscutting Conversation: Diversity, Equity, Access, Inclusion DEAI Module Review: Recap/Reflect
<u>Wednesday, May 14</u> 1:00 – 3:00 PM ET	Seminar Closing Class Course Review: Recap/Reflect/Acknowledgements
5:00 – 6:30 PM ET	Seminar Closing Celebration & Alumni Reunion Introductions, Recognitions, Reconnections: Seminar Participants, AEF Hosts, AEFI Advisors, Seminar Alumni, & AEFI Lead Underwriters

2025 SEMINAR ON STRATEGY FOR ARTIST-ENDOWED FOUNDATION LEADERS

MODULE	WEEK	DATE	DAY	1:00 to 2:15 PM EST	2:30 to 3:45 PM EST	4:00 to 5:15 PM EST/5:30 PM EST
Course Start-up	1	25-Feb	TUES			Opening Reception
	1	26-Feb	WEDS	Opening Class: Course Orientation & Start-Up		
Legacy Stewardship	2	5-Mar	WEDS	Site Visit #1: Emily Mason Alice Trumbull Mason Foundation	Foundation Basics	Public Benefit
	3	12-Mar	WEDS	Fiduciary Duties	Foundations & Insiders	Foundations & Family Module Review
Organizational Viability	4	19-Mar	WEDS	Site Visit #2: Corita Art Center	Governance	Starting Up/Re-Organizing
	5	26-Mar	WEDS	Art Market Strategy	Business Model	Art Stewardship Planning Module Review
Cultural Asset Stewardship	6	2-Apr	WEDS	Site Visit #3: Surf Point Foundation	Art Collections	Archives
	7	9-Apr	WEDS	Oeuvre Scholarship	Intellectual Property	Oeuvre Management Module Review
Philanthropic Impact	8	16-Apr	WEDS	Site Visit #4: Mike Kelley Foundation for the Arts	Grantmaking	Support to Individuals
	9	23-Apr	WEDS	Museums Gifts/Sales	Educational/Public Programs	Diversity/Equity/Access/Inclusion Module Review
Foundation Operations	10	30-Apr	WEDS	Site Visit #5: Isamu Noguchi Foundation & Garden Museum	Professional Advisors	Risk Management
	11	7-May	WEDS	Foundation Planning	Digital Engagement	Foundation Termination Module Review
Course Conclusion	12	14-May	WEDS	Closing Class: Wrap-Up & Reflections		Closing Celebration

AEF Hosts: Corita (Kent) Art Center • Mike Kelley Foundation for the Arts • Emily Mason | Alice Trumbull Mason Foundation • Isamu Noguchi Foundation & Garden Museum • Surf Point Foundation (Beverly Hallam)

The Aspen Institute Artist-Endowed Foundations Initiative | AEFI

2025 SEMINAR SCHEDULE DETAIL

Tuesday, February 25

5:00 – 6:30 PM ET

Opening Reception

Welcome, Introductions, and Socializing

Seminar Participants

AEF Hosts

AEFI Advisors

AEFI Lead Underwriters

AEFI Donors

Seminar Team

Welcome

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

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

Wednesday, February 26

1:00 – 3:00 PM ET

Course Start-Up

Seminar Opening Class

What is the Seminar's mission and philosophy?

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

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

Participant Engagement

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

How will participants engage throughout the Seminar?

Christine J. Vincent, Seminar Director

Carlota Perez-Appelbaum and **Valeria Cordero Reyes**, Co-Moderators
Advisors, Cruz Diez Foundation (Carlos Cruz-Diez), Seminar 2023

Stephanie Tinsley, Seminar Event Management Intern

AEF Consortium Advancing Next-Gen Leaders in the Visual Arts, 2023 Cohort

Seminar Participants

Wednesday, March 5
1:00 – 5:15 PM ET

1:00 – 2:15 PM ET

Site Visit: Emily Mason | Alice Trumbull Mason Foundation

Steven Rose, President/Executive Director

Kathleen Granados, Digital Content & Archives Manager

www.ematm.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

Rose Chan Louis

Founding Executive Director, Program on Philanthropy & Nonprofits
UCLA School of Law

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

Lisa Wang
Senior Counsel, Ford Foundation

Wednesday, March 12
1:00 – 5:30 PM ET

Legacy Stewardship and Artist-Endowed Foundations, Continued

1:00 – 2:15 PM

Session 1.3 Fiduciary Duties

What are Fiduciary Duties and their ramifications?
What influences do Fiduciary Duties have on AEF leaders?

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

Class Faculty
Christine J. Vincent, Moderator

Yael Fuchs
Co-Chair, State & Local Regulation Subcommittee, Exempt Organizations Committee
American Bar Association
Partner, Loeb & Loeb LLP

2:30 – 3:45 PM ET

Session 1.4. Foundations and Insiders

Who are "Disqualified Persons"?
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

Rosemary Fei

Former Chair, Exempt Organizations Committee, American Bar Association
Principal, Adler & Colvin

4:00 – 5:15 PM ET

Crosscutting Conversation: Foundation and Family

Learning From Foundations and Family Experiences

Conversation Guests

Jack Cowart

Executive Director
Roy Lichtenstein Foundation

Victoria Woodhull

Director, Kenneth Noland Foundation
Seminar 2016, 2017

5:15 – 5:30 PM ET

Module Review

Recap/Reflect

Open Questions on the Legacy Stewardship and AEFs Curriculum?

Major Take-Aways?

Christine J. Vincent, Moderator

Wednesday, March 19

1:00 – 5:15 PM ET

1:00 – 2:15 PM ET

Site Visit: Corita Art Center (Corita Kent)

Nellie Scott, Executive Director

www.corita.org/

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: Dorothea & Leo Rabkin 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

Mary Louise Schumacher

Executive Director

Dorothea & Leo Rabkin Foundation

Seminar 2023

Gayle Binney

Manager, Board Relations

TIAA

4:00 – 5:15 PM ET

Session 2.2 Starting Up/Reorganizing

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

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

Class Faculty

Christine J. Vincent, Moderator

Caryn Young

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

Rachel Churner

Director
Carolee Schneemann Foundation
Seminar 2021

Sanford Hirsch

Executive Director
Adolph and Esther Gottlieb Foundation

Wednesday, March 26

1:00 – 5:30 PM ET

Organizational Viability, Continued

1:00 – 2:15 PM ET

Session 2.3 Art Market Strategy

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

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

What are the associated responsibilities-- Duty of Care?

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

Class Faculty

Christine J. Vincent, Moderator

Amelia K. Brankov

Chair, Art Law Committee, New York City Bar Association
Principal, Brankov PLLC

Megan Fox Kelly

Former 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?

What are the considerations in working with an investment advisor?

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

Class Faculty

Christine J. Vincent, Moderator

Ed Rada

Board Member
The Mike Kelley Foundation
for the Arts

Aimee Solomon

Chief Financial Officer
Joan Mitchell Foundation

Anne Duggan

Managing Director, Client CIO Group
The Investment Fund for Foundations | TIFF

4:00 – 5:15 PM ET

Crosscutting Conversation: Long-term Stewardship Planning

Considering Key Elements in Art Stewardship Planning

Conversation Guests

Stephen K. Urice

AEFI Advisor and Professor of Law
University of Miami School of Law

Jack Flam

Board Member & President
Emeritus, Dedalus Foundation
(Robert Motherwell)

Susan Larsen

Executive Director Emerita
Dorothea & Leo Rabkin Foundation
Seminar 2016

5:15 – 5:30 PM ET

Recap/Reflect

Module Review

Recap/Reflect

Open Questions on the Organizational Viability Curriculum?

Major Take-Aways?

Christine J. Vincent, Moderator

Tuesday, April 2
1:00 – 5:15 PM ET

1:00 – 2:15 PM ET

Site Visit: Surf Point Foundation ((Beverly Hallam)

Yael Reinharz, Executive Director

Seminar 2018

www.surfpoint.me/

3. Cultural Asset Stewardship

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

2:30 – 3:45 PM ET

Session 3.1 Art Collections

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

- Challenges in Initiating Collection Stewardship
- Leadership Insights: The Hedda Sterne Foundation
- Leadership Insights: Noah Purifoy Foundation
- Leadership Insights: Woodman Family Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Pauline Forlenza, Moderator

Director & CEO

American Federation of Arts

Shaina Larrivee

Executive Director

The Hedda Sterne Foundation

Joseph S. Lewis, III

President

Noah Purifoy Foundation

Lissa McClure, Executive Director

Woodman Family Foundation

(Betty Woodman, Francesca Woodman,

George Woodman) Seminar 2019

Alexa Reid Smith

Director of Business Development

UOVO (AEFI Lead Underwriter)

4:00 – 5:15 PM ET

Session 3.2 Archives

What are an AEF's responsibilities in archive ownership?

How can an archive's public benefit be optimized?

- Centrality of Access in Archival Stewardship
- Challenges in Initiating Archive Stewardship
- Leadership Insights: Josef & Anni Albers Foundation
- Leadership Insights: Robert Rauschenberg Foundation

- Leadership Insights: Harriet & Esteban Vicente Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Nicholas Martin, Moderator
Curator for the Arts & Humanities
NYU Fales Library Special Collections

Brendan Danilowitz
Chief Curator
The Josef & Anni Albers Foundation

Francine Snyder
Director of Archives & Digital
Robert Rauschenberg Foundation

Eren Johnson
Archives & Collections Director
Harriet & Esteban Vicente Foundation
Seminar 2018

Wednesday, April 9

1:00 – 5:30PM ET

Cultural Asset Stewardship, Continued

1:00 – 2:15 PM ET

Session 3.3 Oeuvre Scholarship

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

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

Class Faculty

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

Katy Rogers
President & CEO
Dedalus Foundation (Robert Motherwell)
Director, Robert Motherwell Catalogue Raisonné

Debra Burchett-Lere
President/Executive Director
Sam Francis Foundation
Director, Sam Francis Catalogue Raisonné

Lisa Le Feuvre
Executive Director
Holt-Smithson Foundation (Nancy Holt, Robert Smithson)
Seminar 2018

2:30 – 3:45 PM ET

Session 3.4 Intellectual Property

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

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

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

Class Faculty

Bhamati Viswanathan, Moderator
Chair, New England Chapter, Copyright Society of the USA
Faculty Fellow, New England Law

Sheila Schwartz
Research & Archives Director
Sol Steinberg Foundation

Gil Vazquez
Executive Director
Keith Haring Foundation

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

4:00 – 5:15 PM ET

Crosscutting Conversation: Oeuvre Management

Drilling down on oeuvre management strategies

Conversation Guests

Leah Levy
Executive Director
The Jay DeFeo Foundation

Michael Ward Stout
President
Robert Mapplethorpe Foundation

5:15 – 5:30 PM ET

Recap/Reflect

Module Review

Recap/Reflect

Open Questions on the Cultural Asset Stewardship Curriculum?

Major Take-Aways?

Christine J. Vincent, Moderator

Wednesday, April 16
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

Seminar 2016

mikekelleyfoundation.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: Graham Foundation for Advanced Study in the Fine Arts
- Leadership Insights: Jerome Foundation
- Leadership Insights: Ezra Jack Keats Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Rocio Aranda Alvarado, Moderator

Senior Program Officer

Creativity & Free Expression

Ford Foundation

Sara Herda

Executive Director

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

Eleanor Savage

President & CEO

Jerome Foundation

Deborah Pope

Executive Director

Ezra Jack Keats Foundation

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: Martin Wong Foundation
- Leadership Insights: Ellis-Beauregard Foundation (David Ellis, Joan Beauregard)

- Leadership Insights: Joan Mitchell Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Judilee Reed, Moderator
President & CEO
Judilee Reed

Gary Ware
President
Martin Wong Foundation

Solana Chehtman
Director of Artist Programs
Joan Mitchell Foundations

Donna McNeil
Executive Director
Ellis-Beauregard Foundation
(David Ellis, Joan Beauregard)
Seminar 2018

Wednesday, April 23

1:00 – 5:30 PM ET

Philanthropic Impact, Continued

1:00 – 2:15 PM ET

Session 4.3 Museum Gifts and Charitable Sales

*What are an AEF's goals and options for museum gifts and charitable sales of art?
What roles can these play in a broader oeuvre stewardship strategy?*

- AEF Involvement in Museum Gifts and Charitable Sales
- Leadership Insights: Ashley Bryan Center
- Leadership Insights: Emilio Sanchez Foundation
- Leadership Insights: Lenore Tawney Foundation
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

H. Nicholas B. Clark
Executive Director
Ashley Bryan Center

Ann Koll
Former Executive Director
Emilio Sanchez Foundation

Kathleen Mangan
Executive Director
Lenore Tawney Foundation

2:30 – 3:45 PM ET

Session 4.4 Educational Programs

How do AEFs achieve philanthropic impact by conducting educational programs?

What are the considerations in partnering with K-12 and higher education institutions?

In conducting an internship program?

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

Class Faculty

Ilk Yasha, Moderator

Director, Studio Museum Institute

The Studio Museum in Harlem

Daniel Belasco

Executive Director

Al Held Foundation

Diedra Harris-Kelley

Co-Director

Romare Bearden Foundation

Sasha Davis

Executive Director

Renee and Chaim Gross Foundation

Seminar 2018

4:00 – 5:15 PM ET

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

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

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

Conversation Guests

Myron Beasley

Board Member

Surf Point Foundation (Beverly Hallam)

Seminar 2020

Christa Blatchford

Executive Director

Joan Mitchell Foundation

Joseph S. Lewis, III

President

Noah Purifoy Foundation

5:15 – 5:30 PM ET

Recap/Reflect

Module Review

Recap/Reflect

Open Questions on Philanthropic Impact Curriculum?

Major Take-Aways?

Christine J. Vincent, Moderator

Wednesday, April 30
1:00 – 5:15 PM EST

1:00 – 2:15 PM ET

Site Visit: The Isamu Noguchi Foundation & Garden Museum

Amy Hau, Executive Director

Jennifer Lorch, Deputy Director

www.noguchi.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
- Investment Advisors
- Consultants Generally
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Linda Earle, Moderator

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

Christine J. Vincent, Seminar Director

Lauren Kotkin

Philanthropic Practice Educator

4:00 – 5:15 PM ET

Session 5.2 Risk Management

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

- Leadership Insights: Robert Rauschenberg Foundation
- Risk Management Basics
- Art Asset Risks

- Cyber Security Risks
- Employment-Related Risks
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Linda Earle, Moderator

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

Sharon Ullman

Former Deputy Director
Robert Rauschenberg Foundation

Alan Blount

National Cyber Security & Technology
Product Leader
Risk Strategies (AEFI Lead Underwriter)

Mary Pontillo

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

Wednesday, May 7

1:00 – 5:30 PM EST

Foundation Operations, Continued

1:00 – 2:15 PM ET

Session 5.3 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: Toshiko Takaezu Foundation
- Leadership Insights: Harpo Foundation
- Leadership Insights: Gordon Parks Foundation
- Options and Strategies for Institutional Planning
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

Christine J. Vincent, Moderator

Darlene Fukuji

Board President
Toshiko Takaezu Foundation

Julie Deamer

Executive Director
Harpo Foundation (Ed Levine)
Seminar 2020

Peter W. Kunhardt, Jr.

Executive Director
The Gordon Parks Foundation

2:30 – 3:45 PM ET

Session 5.4 Digital Engagement

What considerations should be weighed in developing digital strategies to stimulate public engagement with an AEFs' cultural assets and knowledge resources?
What take-aways can be garnered from such efforts?

- Leadership Insights: Dedalus Foundation (Robert Motherwell)
- Leadership Insights: Richard Diebenkorn Foundation
- Leadership Insights: Judd Foundation (Donald Judd)
- Principles of Digital Engagement
- Questions and Discussion
- Session Summary: Seminar Participants

Class Faculty

David Strauss, Moderator
Global Partnerships Lead
Bloomberg Connects

Julia Norman
Digital Communications Coordinator
Dedalus Foundation (Robert Motherwell)

Katharine James
Head of Digital & Public Engagement
Richard Diebenkorn Foundation

Andrea Walsh
Senior Director, Content & Communications
Judd Foundation (Donald Judd)

4:00 – 5:15 PM ET

Crosscutting Conversation: Foundation Termination

Strategizing, preparing, and implementing foundation termination

Conversation Guests

Kathleen Shields
Former President
Frederick Hammersley Foundation

Lawrence S. Taub
Former President
Mandelman-Ribak Foundation (Beatrice Mandelman, Louis Ribak)

5:00 – 5:15 PM ET

Recap/Reflect

Module Review

Recap/Reflect

Open Questions on Foundation Operations Curriculum?

Major Take-Aways?

Christine J. Vincent, Moderator

Wednesday, May 14

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

Course Conclusion

1:00 – 3:00 PM ET

Seminar Closing Class

Recap/Reflect, Collegial Recognitions

The Way Forward, Key Ideas and Takeaways

Christine J. Vincent, Seminar Director

Carlota Perez-Appelbaum and **Valeria Cordero Reyes**, Co-Moderators

Advisors, Cruz Diez Foundation (Carlos Cruz-Diez), Seminar 2023

Stephanie Tinsley, Seminar Event Management Intern

AEF Consortium Advancing Next-Gen Leaders in the Visual Arts, 2023 Cohort

Seminar Participants

Seminar Closing Celebration

5:00 – 6:30 PM ET

Seminar Closing Celebration & Alumni Reception

Certificate Presentations, Introductions

Reconnections, Networking

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The Investment Fund for Foundations | TIFF

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Jflam@dedalusfoundation.org

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Program on Philanthropy and Social Innovation

The Aspen Institute

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Stephanie Tinsley

2023 Cohort, AEF Consortium Advancing Next-Gen

Leaders in the Visual Arts

FEBRUARY 25 – MAY 14, 2025

SEMINAR PARTICIPANT GUIDELINES

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

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

Educational Acknowledgement

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

Full Participation

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

Code of Conduct

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

Photo Release

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

Seminar Participant List

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

Refund Policy:

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



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 Managing 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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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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