



THE ASPEN INSTITUTE  
ARTIST-ENDOWED  
FOUNDATIONS  
INITIATIVE

2 0 1 8  
ARTIST-ENDOWED  
FOUNDATION  
LEADERSHIP FORUM

PRESENTED BY THE HOFFMAN FORUM  
IN COOPERATION WITH UNIVERSITY OF MIAMI SCHOOL OF LAW

————— HOSTED BY MoMA PS1 —————

# ISSUES & INNOVATIONS IN PRACTICE & POLICY

An Invitational Symposium for  
Senior Leaders of Artist-Endowed Foundations  
Wednesday, November 14, 2018

## THANK YOU

With participants from across the United States and several countries of the European Union, the 2018 edition of the annual Artist-Endowed Foundation Leadership Forum continues its important role connecting leaders of this fast-growing field so that they may share knowledge and foster collegial exchange, thereby strengthening their institutions' charitable impact.

On behalf of the Aspen Institute Artist-Endowed Foundations Initiative/AEFI and University of Miami School of Law, we extend our thanks for the generous support and collaborations that have made possible the 2018 Artist-Endowed Foundation Leadership Forum.

First and foremost, we thank our presenting partner, the Hoffman Forum, and its patrons Deborah and Larry J. Hoffman, arts philanthropists and alumni of University of Miami School of Law. We also thank our host, MoMA PS1, which has graciously welcomed this year's Forum.

We thank the foundation leaders, scholars, and professional experts—listed in the following pages and in the separate Forum Participant Directory—who have made themselves available to share their expertise and reflections during the Forum.

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We offer our gratitude to the AEFI Lead Underwriters. 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 and materials to assist the artist-endowed foundation field.



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We salute the Forum Program Book Sponsors, listed in the following pages, who will be joining the Forum Reception to conclude the day's program.

We thank the members of the AEFI Donor Consortium, led by The Pollock-Krasner Foundation, Roy Lichtenstein Foundation, Andy Warhol Foundation for the Visual Arts, and The Jay DeFeo Foundation, which has taken up this new leadership role to reflect the broader diversity of the artist-endowed foundation field. Philanthropic support provided by the Consortium, whose members are listed in the following pages, funds AEFI's groundbreaking research and publication activities. Lastly, we thank our AEFI Advisors, with Ruth E. Fine, Chair of the Roy Lichtenstein Foundation, picking up Charlie Bergman's mantle by serving as Honorary Chair. The wise perspectives of AEFI's Advisors, also listed in the following pages, inform AEFI's programs and aspirations.

**Christine J. Vincent**  
Project Director, AEFI  
Aspen Institute Artist-Endowed  
Foundations Initiative/AEFI  
Forum Co-Director

**Stephen K. Urice**  
Academic Advisor, AEFI  
Professor of Law  
University of Miami School of Law  
Forum Co-Director

# OVERVIEW

Date & Time Wednesday, November 14, 2018 • 8:00 a.m. to 7:00 p.m.  
Location MOMA PS1  
22-25 Jackson Avenue, Long Island City, NY 11101

## SUMMARY SCHEDULE

8:00 a.m. **Check-in, Continental Breakfast, and Networking**

9:00 a.m. **Welcoming Remarks and Program Overview**

9:30 a.m. **Session I–Strategy Spotlight:**  
*Community Collaborations for Arts Education*

10:20 a.m. **Focus Point:** *Exploring Potential Diversity Initiatives*

10:40 a.m. Break

10:55 a.m. **Focus Point:** *Navigating Key Junctures with Strategic Planning*

11:15 a.m. **Session II–Considerations in Practice:**  
*The Intersection of Archives & Art Collections*

12:05 p.m. **Focus Point:** *Highlights from AEFI's Study Report Update 2018*

12:25 p.m. Break and Transition to Luncheon Program

12:35 p.m. **Networking Luncheon**  
**An Appreciation:** *Charles C. Bergman (1933-2018)*  
**Keynote Conversation:**  
*New Artist-Endowed Foundation Leadership Perspectives*

2:05 p.m. Transition to Afternoon Program

2:15 p.m. **Focus Point:** *Authentication Update*

2:35 p.m. **Session III–Fiduciary Concerns:**  
*Conversations with Artists About Their Intentions*

3:25 p.m. **Focus Point:** *Trends in Art Collection Risk Management*

3:45 p.m. Break

4:00 p.m. **Focus Point:** *Dealing With the Increasing Complexity of Human Resource Regulations*

4:20 p.m. **Session IV–Closed-Door Conversation:**  
*Making Difficult Leadership Decisions*

5:10 p.m. **Summary Responses and Closing Remarks**

5:30 p.m. **Exhibition Tour and Networking Reception**  
**Exhibition:** *Bruce Nauman: Disappearing Acts*

7:00 p.m. **Forum Concludes**

# AGENDA



## 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; and
- Informing the research, publication, and knowledge-sharing programs of the Aspen Institute Artist-Endowed Foundations Initiative/AEFI.

The Forum is predicated on the principle that the field 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 only their own foundation's individual characteristics and concerns; and, as such,
- Leaders will serve as resources for the broader field's advancement, contributing their knowledge to artists, artists' family members, and other artist-endowed foundations.

## SCHEDULE

**Wednesday, November 14, 2018**

**MoMA PS1 | 22-25 Jackson Avenue, Long Island City, NY 11101**

**8:00 a.m. Check-in, Continental Breakfast, and Networking**  
Location: M. Wells Dinette

**9:00 a.m. Welcoming Remarks and Program Overview** | Location: VW Dome  
**Sarah Arison**, Co-Vice-Chairman, MoMA PS1  
**Ruth E. Fine**, Honorary Chair, AEFI Advisors, and Chair, Roy Lichtenstein Foundation  
**Osamudia James**, Acting Dean & Professor of Law, University of Miami School of Law

Forum Co-Directors:

**Christine J. Vincent**  
Project Director  
Aspen Institute Artist-Endowed  
Foundations Initiative/AEFI

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

**9:30 a.m. Session I—Strategy Spotlight: *Community Collaborations for Arts Education***

**Purpose:**

Explore a range of formats for partnerships with community organizations through which foundations provide arts education programs.

**Panelists:**

**Katy Rogers**

Vice President and Programs Director  
Dedalus Foundation

**Mallory McClaire**

Chief of Staff  
Rebuild Foundation

**Jacques Rodrigue**

President  
George Rodrigue Foundation  
of the Arts

**Sasha Davis**

Executive Director  
Renee & Chaim Gross  
Foundation

**Moderator:**

**Jennifer Dowley**

Former President, Berkshire Taconic  
Community Foundation, AEFI Advisor

10:20 a.m. **Focus Point: *Exploring Potential Diversity Initiatives***

**Purpose:**

Introduce processes that can help foundations consider how they might begin to optimize diversity in their organizations and programs.

**Conversants:**

**Lisa Funderburke Hoffman**

Executive Director  
Alliance of Artists Communities

**Katy Rogers**

Vice President and Programs Director  
Dedalus Foundation

**Jean Shin**

Secretary  
Joan Mitchell Foundation

10:40 a.m. **Break**

10:55 a.m. **Focus Point: *Navigating Key Junctures with Strategic Planning***

**Purpose:**

Share approaches to planning that foundations can use to identify priorities and build consensus around directions for institutional development.

**Reading:**

*What Is the Best Way to Do Strategic Planning for a Nonprofit?*  
CNM Nonprofit Answer Guide, Center for Nonprofit Management

*Artist-Endowed Foundation Life Cycle*

Aspen Institute Artist-Endowed Foundation Initiative/AEFI

**Presenters:**

**Danielle Amato-Milligan**

Senior Vice President  
Practice Expert, Nonprofit Consulting  
U.S. Trust, Bank of America  
U.S. Trust is an AEFI Lead Underwriter

**Andrea Liguori**

Managing Director  
Richard Diebenkorn  
Foundation

# AGENDA

Interlocutor:

**Diane Frankel**

Co-Trustee

The Jay DeFeo Foundation

11:15 a.m. **Session II—Considerations in Practice: *The Intersection of Archives & Art Collections***

**Purpose:**

Probe the evolving interplay of foundation archival materials, documentary in purpose, and art collections, deployed for exhibition and valued for sale.

**Panelists:**

**Leah Levy**

Executive Director

The Jay DeFeo Foundation

**Lisa Le Feuvre**

Executive Director

Holt-Smithson Foundation

**Francine Snyder**

Director of Archives & Scholarship

Robert Rauschenberg Foundation

**Christina R. Hunter**

Director

Nancy Graves Foundation

**Moderator:**

**Michelle Elligott,**

Chief of Archives, Library, and Research Collections

The Museum of Modern Art, AEFI Advisor

12:05 p.m. **Focus Point: *Highlights from AEFI's Study Report Update 2018***

**Purpose:**

Review key findings of the new Study Report Update 2018, revealing trends and factors in foundation creation, assets, charitable activities, etc.

**Presenters:**

**Christine J. Vincent**

Project Director

The Aspen Institute

Artist-Endowed Foundations

Initiative/AEFI

**Marion R. Fremont-Smith**

Senior Research Fellow

Hauser Institute for Civil Society

Harvard University

AEFI Advisor

**Interlocutor:**

**Dennis Scholl**

President and CEO, ArtCenter/South Florida

Former Vice President of Arts

John S. and James L. Knight Foundation

12:25 p.m. **Break and Transition to Luncheon Program**

12:35 p.m. **Networking Luncheon**

**Luncheon Program | An Appreciation: Charles C. Bergman (1933-2018)**

**Presenter:**

**Jack Flam**

President and CEO  
Dedalus Foundation

**Keynote Conversation:** New Artist-Endowed Foundation Leadership Perspectives

**Purpose:**

Share insights from two new foundation leaders, one joining an established foundation and one managing the build-out of a newly endowed foundation.

**Guests:**

**Kathy Halbreich**

Executive Director  
Robert Rauschenberg Foundation

**Lynn Caponera**

President  
Maurice Sendak Foundation

**Host:**

**Alberta Arthurs**

Former Director, Arts & Humanities  
Rockefeller Foundation, AEFI Advisor

2:05 p.m. **Break and Transition to Afternoon Presentations**

2:15 p.m. **Focus Point:** *Authentication Update*

**Purpose:**

Inform about recent events bearing on art authentication, including legislation to protect art authenticators, progress on a new authentication arbitration program, and a recent court decision on the topic.

**Readings:**

*Bill A5120, An Act to Amend the Arts and Cultural Affairs Law, in Relation to Opinions Concerning Authenticity, Attribution and Authorship of Works of Fine Art, New York State Assembly, 2017-2018 Regular Sessions*

*First of its Kind Global Arbitration Court for Art Disputes Launching June 2018, Authentication in Art Mayor Gallery v. Agnes Martin Catalogue Raisonné, 2018 WL 1638810 (N.Y. Sup. Ct., N.Y. Ct., 2018) Examination Agreement, Agnes Martin Catalogue Raisonné LLC, Artifex Press*

**Presenters:**

**Steven R. Schindler**

Chair, Art Law Committee  
New York City Bar Association  
Partner  
Schindler Cohen & Hochman LLP

**William L. Charron**

Member, Advisory Board  
Authentication in Art  
Partner  
Pryor Cashman LLP

# AGENDA

Interlocutor:

**Stephen K. Urice**

Academic Advisor, AEFI

Professor of Law, University of Miami School of Law

2:35 p.m. **Session III—Fiduciary Concerns: *Conversations with Artists About Their Intentions***

**Purpose:**

Reflect on the process of eliciting artists' statements about their desires for long-term stewardship of their creative works and philanthropic legacies.

**Reading:**

*Interview Resources, Voices in Contemporary Art/VoCA*

<http://www.voca.network/voca-resources/>

**Panelists:**

**Susan Larsen**

Executive Director

Dorothea & Leo Rabkin Foundation

**Debra Burchett-Lere**

President

Sam Francis Foundation

**Jack Flam**

President and CEO

Dedalus Foundation

**Andria Morales**

Director

Von Rydingsvard and Greengard Foundation

**Moderator:**

**Jill Sterrett**

Deputy Director

The Smart Museum, University of Chicago

President, Voices in Contemporary Art/VoCA

3:25 p.m. **Focus Point: *Trends in Art Collection Risk Management***

**Purpose:**

Discuss recent developments in risk management practices for foundation art collections.

**Presenters:**

**Mary Pontillo**

Senior Vice President

National Fine Arts Practice Leader

DeWitt Stern/Risk Strategies

AEFI Lead Underwriter

**Casey Tabor**

Senior Account Manager

UOVO

AEFI Lead Underwriter

**Interlocutor:**

**Susan Reynolds**

Executive Director

The Milton Resnick and Pat Passlof Foundation

3:45 p.m. **Break**



4:00 p.m. **Focus Point: *Dealing With the Increasing Complexity of Human Resource Regulations***

**Purpose:**

Survey strategies by which smaller nonprofits may fulfill their human resource responsibilities, build a positive work culture, and limit liability.

**Reading:**

*Human Resources Checklist and Nonprofit Excellence: Human Resources Nonprofit Coordinating Committee of New York/NPCC*

**Presenters:**

**Sharon Stapel**

President & Executive Director  
Nonprofit Coordinating  
Committee of New York/NPCC

**Robert Rosenzweig**

Vice President and National  
Cyber Risk Practice Leader  
DeWitt Stern/Risk Strategies  
AEFI Lead Underwriter

**Interlocutor:**

**Morgan Spangle**

Executive Director  
Dedalus Foundation

4:20 p.m. **Session IV–Closed-Door Conversation: *Making Difficult Leadership Decisions***  
***Conversation and audience Q&A are confidential. This is a closed-door session.***

**Purpose:**

Consider examples of effective practice when preparing for and implementing hard decisions that must be made in the foundation's best interest, such as changing art dealer representation; complying with a requirement to move family members off of a board or revising a termination distribution plan.

**Panelists:**

**Mary Clare Stevens**

Executive Director  
Mike Kelley Foundation for the Arts

**Richard Grant**

Executive Director  
Richard Diebenkorn Foundation

**Jack Cowart**

Executive Director  
Roy Lichtenstein Foundation

**Moderator:**

**Stephen K. Urice**

Academic Advisor, AEFI  
Professor of Law, University of Miami School of Law

# AGENDA

## 5:10 p.m. Summary Responses and Closing Remarks

### Respondents:

#### **Michael Tobiason**

President  
Dale and Leslie Chihuly Foundation

#### **Charles Duncan**

Executive Director  
Richard Pousette-Dart Foundation

### Forum Co-Directors:

#### **Christine J. Vincent**

Project Director, AEFI

#### **Yoshito Yoshioka**

Executive Director  
One Million Years Foundation

#### **Elizabeth Smith**

Executive Director  
Helen Frankenthaler Foundation

#### **Stephen K. Urice**

Academic Advisor, AEFI  
Professor of Law, University of Miami School of Law

## 5:30 p.m. Exhibition Tour and Networking Reception

### Reading:

*Bruce Nauman: Disappearing Acts*, Exhibitions and Events, MoMA PS1  
<https://www.moma.org/calendar/exhibitions/3852?locale=en>

### Exhibition:

*Bruce Nauman: Disappearing Acts*

### Exhibition Commentary:

#### **Magnus Schaefer**

Assistant Curator  
Department of Drawings and Prints  
The Museum of Modern Art

#### **Taylor Walsh**

Curatorial Assistant  
Department of Drawings and Prints  
The Museum of Modern Art

### Networking Reception and Art Book Browse:

Locations: ARTBook@MoMA PS1 | M. Wells Dinette

## 7:00 p.m. Forum Concludes

# AN APPRECIATION



Photo by Joe Fornabolo

## **Charles C. Bergman** (1933-2018)

Charles C. Bergman—“Charlie” to his many friends and colleagues in the artist-endowed foundation community—was chairman and chief executive officer of The Pollock-Krasner Foundation, which he guided for more than three decades.

Born in 1933 and raised in Boston, Baltimore, and Pittsburgh, Charlie graduated from Harvard University in 1954. In the early 1960s, he served as a vice president of the People to People Health Foundation (Project HOPE) and as vice president of the Inter-American Foundation for the Arts, a Rockefeller Foundation initiative fostering U.S. and Latin American cultural exchange. Beginning in the mid-1960s he led the largest psychotherapy training program in the United States, which became known as the Institutes of Religion and Health. During this period, he was appointed a Presidential Fellow of the Aspen Institute of Humanistic Studies, now the Aspen Institute.

In 1984, Gerald Dickler, Lee Krasner’s attorney and co-trustee of her estate, asked Charlie to serve as a consultant on forming a charitable foundation to be established with the assets of the estates of Krasner and her spouse, Jackson Pollock. When the foundation was formalized in April 1985, he became Executive Vice President of the Pollock-Krasner Foundation, serving at first with President Eugene V. Thaw (co-trustee of Krasner’s estate). He assumed the role of Chairman and CEO in 1999 and was joined by Kerrie Buitrago as Executive Vice President, now Chief Operating Officer, and, upon Thaw’s retirement as President, worked closely with his successor, Samuel Sachs II.

It was largely due to Charlie’s insight that the Pollock-Krasner Foundation chose to fulfill its mission to assist individual artists by making cash grants to needy and worthy visual artists, in the United States and internationally. Under his leadership, the Foundation awarded more than 4,400 grants totaling more than \$71 million in 77 countries.

Beyond the Pollock-Krasner Foundation, Charlie served on the boards of numerous arts and cultural organizations, including the Cultural Affairs Advisory Committee of New York City, the New York State Council on the Arts, and the Overseers Committee of the Harvard Art Museums, as well as the Alliance for Young Artists and Writers, National YoungArts Foundation, Fine Arts Work Center, New York Foundation for the Arts leadership council, Fund for Park Avenue sculpture committee, and the philanthropy committee of the Robert Rauschenberg Foundation, among others. Numerous honors recognized his service, most recently the Gertrude Vanderbilt Whitney Award for Outstanding Patronage of the Arts, presented in 2017 by the Skowhegan School of Painting and Sculpture.

A passionate advocate for support to individual artists, and thus also a strong proponent of artists’ generosity to other artists via creation of artist-endowed foundations, Charlie was a seminal influence in the creation of the Aspen Institute National Study of Artist-Endowed Foundations, which evolved subsequently into the Aspen Institute Artist-Endowed Foundations Initiative/AEFI. Realizing this young field’s potential to substantially expand cultural philanthropy resources, and observing its growing influence in art stewardship, he promoted the idea of a research project to document and disseminate effective practices as a strategic intervention in the field’s emergence. He led the fundraising required to undertake the Study, with the Pollock-Krasner Foundation joining the Andy Warhol Foundation for the Visual Arts and Roy Lichtenstein Foundation as the tripartite leadership of the project’s donor consortium, and served until his death as Honorary Chair, AEFI Advisors. AEFI’s progress is a tribute to his vision and commitment.

# KEYNOTE CONVERSATION

## NEW ARTIST-ENDOWED FOUNDATION LEADERSHIP PERSPECTIVES



Photo by Deb Caponera

### Lynn Caponera

Lynn Caponera is President and Executive Director of The Maurice Sendak Foundation, posts she has held since the artist's death in 2012. A close friend of the artist, Caponera worked for Maurice Sendak for over thirty years, first in her teens as an overall helper, and then as an adult, serving as his personal assistant. An accomplished ceramicist, currently Ms. Caponera is overseeing the ongoing evolution of The Maurice Sendak Foundation by guiding its work to implement Sendak's intentions. These intentions, as described in the Foundation's mission statement, include charitable support for children's literacy, animal welfare, and the arts, mentorships for emerging artists, and the promotion of Sendak's legacy through publishing, exhibitions, educational programs, and the archiving of his work. The Maurice Sendak Foundation underwrites both The Maurice Sendak Collection at the University of Connecticut (which will house all of the artist's original work for his published books) and The Maurice Sendak House & Archive, which will be open to the public by appointment in 2019.



Photo by Peter Ross

### Kathy Halbreich

Kathy Halbreich was appointed as the second Executive Director of the Robert Rauschenberg Foundation in November 2017. She assumed the position full-time in November 2018 following the October 2018 opening of the Bruce Nauman retrospective—*Bruce Nauman: Disappearing Acts*—at The Museum of Modern Art and MoMA PS1. Halbreich headed the curatorial team for this exhibition, which was co-organized with Schaulager, Basel, where it premiered in March 2018 prior to traveling to New York City. Before she assumed directorship of the Robert Rauschenberg Foundation, Halbreich was appointed to the newly created position of Associate Director at The Museum of Modern Art in 2008 and subsequently was named the first Laurenz Foundation Curator in 2016. In 2014, she was the lead curator of the retrospective *Alibis: Sigmar Polke 1963–2010*, organized with Tate Modern, London. Prior to joining MoMA, Halbreich served for 16 years as director of the Walker Art Center, Minneapolis.

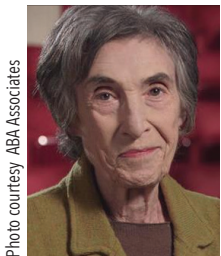


Photo courtesy ABA Associates

### Alberta Arthurs

Alberta Arthurs is an advisor and commentator active in the fields of culture, philanthropy, and higher education who writes and speaks often on contemporary culture and its challenges. Most recently she was the Director for Arts and Humanities at the Rockefeller Foundation and prior to that was President of Chatham College. Arthurs has served on numerous non-profit boards and advisory committees. Her current service focuses on the League of American Orchestras, Tribeca Film Institute, En Garden Arts, and Salzburg Global Seminar. Recent advisory roles include those with the Dorothy and Lillian Gish Prize, J.P. Morgan Chase Trustee; Brademas Center at New York University; Association of Performing Arts Presenters; and the AG Foundation, among others. She graduated from Wellesley College and holds the PhD in English Literature from Bryn Mawr College. Her engagement with non-profit cultural and educational concerns, her advisory positions, and her project-building initiatives have been both national and international.

# GUEST SPEAKERS & MODERATORS

## NON-AEF GUEST SPEAKERS & MODERATORS\*

**Danielle Amato-Milligan** is Senior Vice President, Practice Expert, Nonprofit Consulting, U.S. Trust, Bank of America, where she provides nonprofits with tailored guidance on strategic planning, governance, development, and board and staff training so that they can realize their missions and goals. U.S. Trust is an AEFI Lead Underwriter.

**Sarah Arison** is Co-Vice-Chairman of MoMA PS1. She serves as President of Arison Arts Foundation and is a member of the governing bodies of Americans for the Arts, American Ballet Theatre, Brooklyn Museum, The Museum of Modern Art, National YoungArts Foundation, New World Symphony, and Americas Foundation of the Serpentine Galleries.

**Alberta Arthurs**, a former director of arts and humanities at the Rockefeller Foundation as well as a former president of Chatham College, is a consultant and commentator active in the fields of the arts and culture, humanities, and higher education. She is an AEFI Advisor.

**William L. Charron**, a member of the advisory board of the Hague-based nonprofit organization Authentication in Art, is a partner of the law firm Pryor Cashman LLP, where he has led litigation on art authentication matters.

**Jennifer Dowley**, a former president of Berkshire Taconic Community Foundation, is also a former director of the Museums and Visual Arts Program at the National Endowment for the Arts, and founder of Headlands Center for the Arts, as well as public art commissioning programs in Sacramento, CA, and Boston/Cambridge, MA.

**Michelle Elligott** is Chief of Archives, Library, and Research Collections at The Museum of Modern Art, directing its efforts in collection acquisitions, preservation, and accessibility across all platforms to ensure that MoMA is a leading center for the study of modern art. She is an AEFI Advisor.

**Marion R. Fremont-Smith**, recognized nationally as the authority on nonprofit governance, is a senior research fellow of the Hauser Institute for Civil Society at Harvard University. Most recently, she served as co-reporter for the American Law Institute's first Restatement of the Law of Charitable Nonprofit Organizations. She is an AEFI Advisor.

**Lisa Funderburke Hoffman** is Executive Director of the Alliance of Artists Communities, where she has spearheaded the Diversity and Leadership Fellowship, promoting equity in the artist residency field through support of emerging arts administrators of color and those with disabilities. She serves currently on the boards of the Institute of Museum and Library Services and National Assembly of State Arts Agencies, among other organizations, and on the Individual Artist Committee of Grantmakers in the Arts.

**Osamudia James** is Acting Dean and Professor of Law, University of Miami School of Law. She writes and teaches in the areas of Education Law, Race and the Law, Administrative Law, and Torts, exploring the interaction of law and identity in the context of public education. Her media commentary has appeared in the New York Times, in the Washington Post, and on CNN, among other outlets.

**Mary Pontillo**, Senior Vice President and National Fine Arts Practice Leader at DeWitt Stern/Risk Strategies, specializes in meeting the specialized insurance needs of artist-endowed foundations, art dealers, artists' studios, private collectors, and museums, including supporting client education to enhance risk management capacity. DeWitt Stern/Risk Strategies is an AEFI Lead Underwriter.

**Robert Rosenzweig** is Vice President and National Cyber Risk Practice Leader at DeWitt Stern/Risk Strategies, where he advises nonprofits, corporations, professional firms, and financial institutions about their security, privacy, management, and professional liability exposure and develops customized insurance programs to transfer these risks. DeWitt Stern/Risk Strategies is an AEFI Lead Underwriter.

**Steven R. Schindler**, Chair of the Art Law Committee of the Bar Association of the City of New York, is a founding partner of Schindler Cohen & Hochman LLP, where he leads the firm's art law practice, advising galleries, collectors, and nonprofits on art transactions and litigating matters involving authentication, provenance, title, and appraisal of art.

**Dennis Scholl** is President and CEO, ArtCenter/South Florida. He is an alumnus of University of Miami School of Law (J.D. '81) and served previously as vice president of arts at the John S. and James L. Knight Foundation. A documentary filmmaker, his current film focuses on the complex legacy of Clyfford Still.

**Sharon Stapel** is President and Executive Director of the Nonprofit Coordinating Committee of New York, a membership association serving charitable tax-exempt organizations in the New York City region through advocacy, information, and education promoting excellence in nonprofit management and governance.

**Jill Sterrett** is Deputy Director for Museum Affairs and Strategic Impact at the Smart Museum, University of Chicago. Most recently, she served as Director of Collections at the San Francisco Museum of Modern Art. She is President, Voices in Contemporary Art/VoCA, promoting conversations among artists and their collaborators as a new model to advance stewardship of contemporary art.

**Casey Tabor** is Senior Account Manager at UOVO, where she draws on her training as a studio artist and experience in client services to support artist-endowed foundations, artists' estates and studios, museums, art dealers, and collectors by coordinating comprehensive collection management services. UOVO is an AEFI Lead Underwriter.

**Stephen K. Urice**, Academic Advisor, AEFI and Professor of Law and Director, Arts Law Track, LL.M. in Entertainment, Arts, and Sport 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.

*\*See the Forum Participant Directory for a full listing of AEF Forum participants.*

## PARTICIPANT GUIDELINES

The 2018 Artist-Endowed Foundation Leadership Forum (2018 AEF Leadership Forum), Wednesday, November 14, is presented by the Hoffman Forum in cooperation with the Aspen Institute Artist-Endowed Foundation Initiative (AEFI) and University of Miami School of Law (UMSL), and hosted by MoMA PS1. The event is designed to encourage collegial exchange and mutual learning on issues and innovations in policy and practice among senior leaders of artist-endowed foundations, as well as to inform the research, publication, and knowledge-sharing programs of the AEFI, 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 this mission. By registering, participants agree to comply with these guidelines.

### Eligibility

The 2018 AEF Leadership Forum is an invitational symposium exclusively for senior leaders of artist-endowed foundations, specifically those individuals who hold policy-setting positions in roles such as executive staff and officers of the governing board. Graduates of AEFI's annual Seminar on Strategy for Artist-Endowed Foundation Leaders also are eligible to be invited. Non-transferrable invitations to participate in the 2018 AEF Leadership Forum are made at the sole discretion of AEFI.

### Educational Acknowledgment

All AEFI programs, including the 2018 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 2018 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

All participants in the 2018 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. *In addition, to ensure the type of frank commentary that is essential for collegial learning, certain panels of the day's program will be conducted as confidential, closed-door sessions; all remarks by panelists as well as audience questions and discussions are confidential. By registering to participate, all participants in the 2018 AEF Leadership Forum agree to abide by this rule.*

### Non-Solicitation

The 2018 AEF Leadership Forum is a non-solicitation environment. Accordingly, fundraising and business solicitation are not permitted.

### Photo Release

AEFI and UMSL will on occasion use photographs of persons participating in the 2018 AEF Leadership Forum in AEFI's and UMSL's educational and informational materials, including on AEFI's webpage ([www.aspeninstitute.org/aefi](http://www.aspeninstitute.org/aefi)) and UMSL's webpage ([www.law.miami.edu](http://www.law.miami.edu)). All participants in the 2018 AEF Leadership Forum acknowledge that the official photographer for the event may photograph them during the program and that the photographs may be used in AEFI's and UMSL's educational and informational materials.

### Forum Participant List

To facilitate collegial exchange, participants in the 2018 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, shared, or used in any other way. If you wish your contact information to be excluded, please send an email to [vincent.christine@gmail.com](mailto:vincent.christine@gmail.com) immediately upon registration.

### Refund Policy

No registration fee refunds will be issued after Friday, October 26, 2018. To cancel participation prior to this date, please send an email to [vincent.christine@gmail.com](mailto:vincent.christine@gmail.com). A \$25 processing fee will be charged on all refunds.

## FORUM STAFF

### Forum Co-Directors

**Christine J. Vincent**

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

**Stephen K. Urice**

Academic Advisor, AEFI  
Professor of Law  
University of Miami School of Law

### Forum Managing Director

**Julie Guerrero Schor**

Associate Director, Finance and Programs  
Program on Philanthropy & Social Innovation  
The Aspen Institute

### Forum Administrative Coordinator

**Ashlee Rea**

Associate Director  
Program on Philanthropy and Social Innovation  
The Aspen Institute

### Forum Interns

**Daniel O'Neill, J.D. (expected 2019)**

University of Miami School of Law

**Stephanie I. Rosner, J.D./LL.M. (expected 2020)**

University of Miami School of Law

## FORUM PARTNERS

### The Hoffman Forum

Convening National and International Thought Leaders Around Significant Public Policy Issues  
[www.law.miami.edu/hoffmanforum](http://www.law.miami.edu/hoffmanforum)

### The 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  
[www.aspeninstitute.org/aefi](http://www.aspeninstitute.org/aefi)

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### MoMA PS1

One of the oldest and largest nonprofit arts centers in the United States devoted to contemporary art, MoMA PS1 is recognized as a defining force in the alternative space movement, standing out from other major arts institutions through its distinctive approach to exhibitions and direct involvement of artists within a scholarly framework. Functioning as a living, active meeting place for the general public, MoMA PS1 is a catalyst for ideas, discourses, and new trends in contemporary art.

[www.moma.org/about/who-we-are/momaps1](http://www.moma.org/about/who-we-are/momaps1)



  
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ARTIST-ENDOWED FOUNDATIONS INITIATIVE | ARTIST-ENDOWED FOUNDATION LEADERSHIP FORUM  
PRESENTED BY THE HOFFMAN FORUM  
IN COOPERATION WITH UNIVERSITY OF MIAMI SCHOOL OF LAW  
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## FORUM RECEPTION HOST

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## PROGRAM BOOK SPONSORS



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**Conducting Research, Publication, and Educational Programs to Strengthen  
the Charitable Impact of the Emerging Artist-Endowed Foundation Field**  
[www.aspeninstitute.org/aefi](http://www.aspeninstitute.org/aefi)

## **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, 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.

\*Deceased

**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.

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

AEFI's work is supported by the staff and colleagues of the Aspen Institute Program on Philanthropy and Social Innovation; by the staff and colleagues of its collaborating partner, University of Miami School of Law; 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.

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.

## **AEFI ADVISORS**

### **Honorary Chair**

#### **Ruth E. Fine**

Chair, Roy Lichtenstein Foundation  
Former Curator of Special Projects in  
Modern Art, National Gallery of Art

#### **Alberta Arthurs**

Former Director of Arts and Humanities  
Rockefeller Foundation

#### **Richard Calvocoressi**

Former Director  
Henry Moore Foundation

#### **Michael Conforti**

Director Emeritus  
The Clark Art Institute

#### **Jennifer Dowley**

Former President  
Berkshire Taconic Community Foundation

#### **Michelle Elligott**

Chief of Archives, Library, and Research Collections  
The Museum of Modern Art

#### **Marion R. Fremont-Smith**

Senior Research Fellow  
Hauser Institute for Civil Society  
Harvard University

#### **Marc-André Renold**

Director  
Art-Law Centre  
University of Geneva, CH

#### **Aida Rodriguez**

Professor Emeritus, Nonprofit Management  
Milano School of International Affairs,  
Management, and Urban Policy  
New School

#### **Stephen K. Urice**

Academic Advisor, AEFI  
Professor of Law  
University of Miami School of Law

## **ADVISORS EMERITI**

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Chairman and CEO  
The Pollock-Krasner Foundation

#### **James T. Demetrian**

Director Emeritus  
Hirshhorn Museum and Sculpture Garden  
Smithsonian Institution

#### **Lowery Stokes Sims**

Curator Emerita  
Museum of Arts and Design

#### **James Allen Smith**

Vice President and Director  
of Research and Education  
Rockefeller Archives Center

*\*Deceased*

## AEFI DONOR CONSORTIUM

AEFI's research and publication programs are made possible by its philanthropic donors whose charitable support ensures that AEFI's resources are available to whomever requires this important information—artists, advisors, foundation leaders, educators, students, scholars, journalists, and the interested public.

### AEFI Donor Consortium Leaders

The Jay DeFeo Foundation  
Roy Lichtenstein Foundation  
The Pollock-Krasner Foundation  
The Andy Warhol Foundation for the Visual Arts

### AEFI Donor Consortium Members\*

The Josef and Anni Albers Foundation  
American Express Foundation  
Anonymous Charitable Foundation  
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*\*New Donor Consortium Members as of 2018*

## AEFI LEAD UNDERWRITERS

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.



### ARIS TITLE INSURANCE CORPORATION

The world's leading art title insurer, managing transaction risk by guaranteeing clear legal ownership of art, cultural objects, and high-value collectibles.

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### UOVO

The foremost provider of fine art storage and services, delivering comprehensive collection stewardship committed to the highest caliber of security, discretion, professionalism, and care.

[www.uovo.art](http://www.uovo.art)

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ARIS is the world's leading art title insurer, the only market-neutral, government-regulated entity managing transaction risk by guaranteeing clear legal ownership of art, cultural objects, and high-value collectibles. Headquartered in New York, ARIS is a division of NYSE-traded Argo Group (ARGO), an international specialty insurance company.

By writing title insurance, a form of insurance originated in the real estate industry, exclusively for the global art industry, ARIS assists each of the market's stakeholders—from artists and their estates, collectors, museums, foundations, and the traditional art trade, to the capital markets monetizing this asset class, as well as governments focused on trade regulation, cultural heritage protection, money laundering, and terrorist financing via looted cultural objects.

Ownership is critically important in art transactions and the stakes are high. How can a buyer be certain the sculpture they want to buy is actually being sold by its legal owner? Without protection, a buyer can lose a piece of art or an object - and the money paid for it - if someone makes a successful title claim. Insuring title to a piece of art is a practical move that helps ensure the integrity of art ownership for years to come. ARIS' policy covers theft, import and export defects, liens and encumbrances, and illegal or unauthorized sales for lifetime ownership and extends to heirs-at-law, ending only when the piece is sold or donated. A risk transfer solution, the policy covers defense and provides full indemnity.

Learn more at [www.argolimited.com/aris](http://www.argolimited.com/aris).

## **DeWitt Stern**

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### **DEWITT STERN | A RISK STRATEGIES COMPANY**

Established in 1899, DeWitt Stern is the premier name in insurance and risk management for fine art, entertainment, media, and private clients, with a standard of exceptional service. From its inception, DeWitt Stern has been an innovation leader in insurance for the arts, from protecting Albert Einstein's violin to pioneering a myriad of unique insurance products covering private collections, galleries, dealers, auction houses, museums, exhibitions, warehouses, and foundations as well as feature films, television commercial production, Broadway shows, and cultural institutions.

The diverse assets and activities of artist-endowed foundations—from stewardship of collections to managing charitable programs and operating specialized facilities—creates a range of complex, nuanced risk issues and insurance needs too often addressed in a piecemeal manner.

DeWitt Stern's risk management leadership in the arts community stems from a conviction that people with deep knowledge and passion will be more effective in the service they deliver. DeWitt Stern marries the ardent expertise of its professionals with an approach based on a comprehensive evaluation of each client's unique risk exposures. For the rapidly emerging field of artist-endowed foundations, access to knowledgeable innovation in risk protection is crucial to fulfilling their unique mission in cultural philanthropy and arts stewardship.

Learn more at [www.dewittstern.com](http://www.dewittstern.com).



## **UOVO**

With a mission to transform the art storage and services experience, UOVO offers a holistic approach to collections management that has established a new paradigm for the stewardship of art, design, fashion, and archival collections.

UOVO's purpose-designed facilities, managed by a team of industry-leading experts, guarantee that precious works are safeguarded with the highest caliber of security, discretion, care, and professionalism. Clients' needs are seamlessly met with a flexible range of climate-controlled spaces and services tailored to support collections of any scale. A dedicated account manager acts as a personal registrar to coordinate packing, transportation, and installation services, executed by experienced art handlers trained to work with a variety of media.

As a partner to artist-endowed foundations, UOVO safeguards the artworks and archives that comprise an artist's creative legacy and supports a foundation's art stewardship activities throughout its life cycle. UOVO has secured collections during estate settlement; organized collection inventory and digitization projects; provided tailored spaces for archivists, conservators, and photographers to work on-site; facilitated curator viewings for museum exhibition loans; and coordinated complex moves across cities and countries.

UOVO is committed to helping artist-endowed foundations fulfill their fiduciary responsibilities and advance their charitable missions as stewards of artworks committed to the public benefit.

Learn more at [www.uovo.art](http://www.uovo.art).



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## **U.S. TRUST**

With a 200-year history helping charitable organizations invest to support their missions, U.S. Trust is one of the nation's most reputable investment management institutions and prides itself on understanding the unique needs of its nonprofit clients.

Artist-endowed foundations play an increasingly important role in cultural philanthropy and in stewarding significant art collections for public benefit. Due to their distinctive bequests, however, artist-endowed foundations often encounter special challenges in developing the financial capacity needed to fulfill their artists' charitable intentions.

We understand these challenges. With deep experience navigating the complexities faced by nonprofits, U.S. Trust works with each client to build an effective plan designed to meet its needs. Our comprehensive investment management solution includes:

- Assessment of financial needs and design of an investment strategy to help fund operational and programmatic objectives
- Guidance on board members' governance responsibilities with respect to endowments
- Direction on regulatory matters that bear on foundations' assets
- Technical assistance on grant-making and strategic program planning
- Delivery of custom workshops to educate board and staff on these matters
- Management of investable assets

A fiduciary focused on clients' best interests, U.S. Trust is one of the largest trustees of charitable assets in the country and is committed to helping artist-endowed foundations make the artist's charitable vision a reality.

Learn more at [www.ustrust.com](http://www.ustrust.com).

## UPCOMING PROGRAM

### SEMINAR ON STRATEGY FOR ARTIST-ENDOWED FOUNDATION LEADERS APRIL 28-MAY 3, 2019

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 have new leadership responsibilities for artist-endowed foundations—directors, officers, trustees, board members, senior staff—as well as those who are supporting an artist’s legacy planning with respect to a potential foundation—professional associates, family members, curatorial advisors. The Seminar orients these individuals to the characteristics of these distinctive organizations, including foundations’ complex charitable business models, diverse philanthropic practices, influential art historical role, and manifold governance and stewardship requirements. The Seminar is based on the findings of AEFI’s National Study of Artist-Endowed Foundations. Site visits and sessions with seasoned foundation leaders are central to the curriculum.

**Dates:** April 28-May 3, 2019 opening dinner plus five full-day sessions with some evening activities.

#### **Location and Sites:**

New York City, hosted by leading artist-endowed foundations. Hosts for the 2018 Seminar were the Dedalus Foundation, Helen Frankenthaler Foundation, Roy Lichtenstein Foundation, The Isamu Noguchi Foundation and Garden Museum, The Gordon Parks Foundation, and the Athena Foundation. Hosts for the 2019 Seminar will be announced when the application process opens.

#### **Who Should Consider Enrolling in This Course:**

- Individuals considering creating an artist-endowed foundation, or supporting an artist in the process of making that decision
- Individuals who have new leadership responsibilities for artist-endowed foundations—directors, officers, trustees, board members, senior staff
- Individuals designated to assume foundation leadership roles in the future, for example upon the artist’s death, including artists’ family members and professional associates
- Leaders of artist-endowed foundations who are interested in a refresher professional educational experience in a collegial setting

#### **Registration:**

By application, acceptance will be determined by the Seminar Admission Committee

Tuition: \$4,000\*

Completion Certificate: Conferred by the Aspen Institute Artist-Endowed Foundations Initiative/AEFI

#### **Apply:**

Receive notice of application availability at [www.aspeninstitute.org/aefi](http://www.aspeninstitute.org/aefi)

“Join Our Mailing List”

*\*Current as of November 1, 2018. Subject to change.*









  
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