

# Worksheet: Long-Term Goal Setting

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This worksheet is included in Chapter 2, "Beginning the Career Documentation Process: Setting Priorities and Goals" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

**Describe your **long-term goal** in as much detail as possible.**

Why do you want to accomplish it? What does completing this goal bring to your life or career?

**Is it possible to break this goal down into smaller, short-term goals? List them here:**

**From the above list, what's the most important action to take?**

(Add this to your short-term goal worksheet on the next page.)

**When do I want this long-term goal completed by?**

**What are a few ways I can measure success in the process of completing this goal?**

For instance, ease in finding documents, better studio management, more time to create rather than sorting through clutter...

**When will I pause to evaluate whether this goal is working for me?**

(Be specific with a date.)

# Worksheet: Short-Term Goal Setting

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This worksheet is included in Chapter 2, "Beginning the Career Documentation Process: Setting Priorities and Goals" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

**Describe your short-term goal in as much detail as possible.**

Why do you want to accomplish it? What does completing this goal bring to your life or career?

**Does this short-term goal support any long-term goal? If so, state it here:**

**I will begin this short-term goal with one action by (date):**

**I'd like to complete this short-term goal by (date):**

**Does this short-term goal have to do with:**

☐ physical organization   ☐ narrative organization   ☐ operational organization (or)   ☐ digital organization

**Do I have what I need to get started today?**

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**If not, what do I need to purchase or procure to then start this short-term goal?**

**Describe what the completion of this goal looks like.**

For instance, a file system in my home office that I can easily access day-to-day.

**List the steps you will take to complete your short-term goal.**

This can include as many small steps as you will need.

Repeat this exercise for as many long-term or short-term goals as you need to inventory your work and career. Remember, the more you revise and revisit these steps the more these will feel like goals that you can accomplish.

# Worksheet: Establish a Work Schedule

This worksheet is included in Chapter 3, "Creating a Support System and Work Plan" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

Worksheets are a useful tool when planning the schedule and steps necessary to create your physical and digital inventories. They help you to clearly see what you intend to complete, who will be performing the tasks, and by what date the work should be done. Use the following templates below to create your own schedule, set project goals, and outline work plans.

## Example

### Your Work Schedule:

Mondays and Wednesdays, 12pm-4pm, Studio Assistant and Artist (sorting, numbering, photo documentation, packing)

Thursdays, 10am-2pm, Art History Intern and Artist  
(scanning, filing, data entry)

### Weekly Work Schedule:

This schedule is for the period of 2 / 1 / 2022 through 2 / 28 / 2022.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
TIME 12pm-4pm	TIME	TIME 12pm-4pm	TIME 10am-2pm	TIME	TIME	TIME
PERSON(S) Artist + Studio Assistant	PERSON(S)	PERSON(S) Artist + Studio Assistant	PERSON(S) Artist + Art History Intern	PERSON(S)	PERSON(S)	PERSON(S)
TASK(S) sorting, numbering, photo doc., packing	TASK(S)	TASK(S) sorting, numbering, photo doc., packing	TASK(S) scanning, filing, data entry	TASK(S)	TASK(S)	TASK(S)

## Your Work Schedule:

## Weekly Work Schedule:

This schedule is for the period of \_\_\_\_\_ through \_\_\_\_\_.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
TIME	TIME	TIME	TIME	TIME	TIME	TIME
PERSON(S)	PERSON(S)	PERSON(S)	PERSON(S)	PERSON(S)	PERSON(S)	PERSON(S)
TASK(S)	TASK(S)	TASK(S)	TASK(S)	TASK(S)	TASK(S)	TASK(S)

# Worksheet: Develop a Work Plan

This worksheet is included in Chapter 3, “Creating a Support System and Work Plan” of Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022.

Chapter 2, “Beginning the Career Documentation Process: Setting Priorities and Goals,” on page 15, takes you through how a goal turns into a work plan. In this section the following activities will guide you in creating a clear outline of the projects you intend to accomplish in both the physical inventory of your work and ephemera and the digital record-keeping. Include projected timeframes and who will be working on each task. Your work plan should establish a flow of work that makes each step in the process the most natural and logical next action to take as you develop your inventory.

For example, if you have a quantity of work that needs to be photographed, assigned Inventory Numbers, and properly stored, but you don’t have a worktable and photography set-up, putting that in place should come first. The following are sample work plans to use as a reference in developing your own.

## Example 1

Project/Goal: Physical Storage and Inventory of Artwork				
	Activities	Timeline (Begin By/Complete By)	Person Responsible	Resources/ Needs
A	Create and affix Inventory Numbers to all works on paper from the current year (approximately 60 pieces).	June 1	Studio Assistant	Existing digital inventory to follow sequential numbering
B	Photograph all of the above works.	June 8/June 15	Studio Assistant and Photographer	Camera and table set-up for photography
C	Wrap, label, and store the above work in folders within the flat files.	June 16/June 30	Studio Assistant	Archival folder paper, glassine, labels, ruler, cutting table
D	Scan exhibition lists, announcements and gallery correspondence from the 1990s.	June 1/ July 31	Art History Intern	Original paper documents, scanner, table
E	Create Inventory Numbers for the above documents and file chronologically by category and number.	June 1/July 31	Art History Intern	Access to existing Inventory Numbers for existing filed documents, archival file folders, labels, computer and printer

## Example 2

Project/Goal: Digital Inventory of Current Year Works on Paper				
	Activities	Timeline (Begin By/Complete By)	Person Responsible	Resources/ Needs
A	Enter images of current year works on paper into database/spreadsheet with Inventory Numbers, dimensions, mediums and other pertinent information	June 16/June 30	Studio Assistant	Computer
B	Enter all scanned gallery correspondence, exhibition announcements, and exhibition lists from 1990s (as above)	July 1/August 31	Art History Intern	Computer
C	Link the above in the database/spreadsheet to the individual artworks exhibited	July 1/August 31	Art History Intern	Computer

## Develop Your Own Plan

For each of the project goals outlined in your work plans, an action plan needs to be created. Use the table below to clearly state your project goals and work plan including tasks to be completed, by whom, with start and completion dates and resources needed for each task.

Project/Goal:				
	Activities	Timeline (Begin By/Complete By)	Person Responsible	Resources/ Needs
A				
B				
C				
D				
E				
F				

# Worksheet: End-of-Workday Reflection/Log Entry

This worksheet is included in Chapter 3, "Creating a Support System and Work Plan" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

Each person working on your archive, including yourself, needs to record the actions that were taken in the archiving process at the end of each workday. This should also include planned next steps or any issues that come up that need to be dealt with. Doing so will help ensure clear handoffs and keep everyone on the same page.

## Example

### End-of-Workday Reflection/Log Entry

Reflective Questions	Log
What action items were tackled today?	<b>Response</b> Sorted all work from Flat File A in piles onto the worktable. Categories: watercolors, pencil drawings, mixed-media drawings, collages
	<b>Things to consider</b> 
What was accomplished?	<b>Response</b> Wrote Inventory Numbers on the back of each of the above pieces in pencil. Noted measurements and mediums of each piece in notebook with Inventory Numbers.
	<b>Things to consider</b> One piece has a large tear. Artist needs to advise.
What needs to be done in preparation for the next workday?	<b>Response</b> Set up photo documentation station. Print out and complete condition report for artwork with tear.
	<b>Person/s Responsible</b> Studio Assistant
What are the action items for the next workday?	<b>Action Items</b> Photograph all the above pieces. Upload images and noted data to database.
	<b>Person/s Responsible</b> Studio Assistant and Photographer



## Complete your own End-of-Workday Reflection/Log Entry

Date: \_\_\_\_\_

Reflective Questions	Log
<b>What action items were tackled today?</b>	Response
	Things to consider
<b>What was accomplished?</b>	Response
	Things to consider
<b>What needs to be done in preparation for the next workday?</b>	Response
	Person/s Responsible
<b>What are the action items for the next workday?</b>	Action Items
	Person/s Responsible

### Other Comments/Issues/Questions:

# Worksheet: Space Costs

This worksheet is included in Chapter 4, "Budgeting for Your Inventory Practice" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

Studio Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Fixture Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Storage Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

<b>Total Space Costs (all categories)</b>	\$	\$
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# Worksheet: Records Costs

This worksheet is included in Chapter 4, "Budgeting for Your Inventory Practice" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

System Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Protection Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Documentation Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

<b>Total Records Costs (all categories)</b>	\$	\$
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# Worksheet: People and Hospitality Costs

This worksheet is included in Chapter 4, "Budgeting for Your Inventory Practice" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide](#), 2022.

People Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Hospitality Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

<b>Total Support Costs (all categories)</b>	\$	\$
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## Worksheet: Time Costs

This worksheet is included in Chapter 4, “Budgeting for Your Inventory Practice” of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide](#), 2022.

Time Costs	One-Time Costs	Ongoing Costs
Total Time Costs (all categories)	hours	hours

## Worksheet: Stuff Everywhere

This worksheet is included in Chapter 5, “Taking Stock and Mapping Your Archival Legacy” of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide](#), 2022.

Where is your collection? If it's in your living space, is the material in an attic, basement, closet, garage, or spare room? Use this worksheet to begin identifying what it is, where it is, its condition, and add a sentence or two about what's in the box/container or specifics about the item.

[illegible]

# Worksheet: Inventory Management Planning

This worksheet is included in Chapter 6, “Creating an Artwork Inventory” of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

The following planning templates will walk you through the steps of planning out your needs for an inventory management system. Your plan may evolve as your studio needs progress. However, establishing a well-documented plan will allow you to quickly pivot and adjust any moving parts as needed.

## 1. Establish Your Inventory Management System Criteria

What is most important for you and your studio? Use the template below to establish your wish list.

Suggested Database Selection Criteria May Include:		Your Criteria:
» Training and support available	» Art world—experienced founders	
» Skill set of staff	» Operating history	
» Number of simultaneous users	» Compelling mission	
» Inventory artwork capacity/limitations	» Data migration services	
» Online vs. browser-based software	» Positive reviews from peer artists	
» Compatibility with your computer's operating system	» Provides tables for the following categories of information: artworks, exhibition history, contacts	
» Customizable, to what extent		

## 2. Evaluate Your Top Three Systems

Google search “art inventory software for artists” to retrieve the most current inventory management database software recommended for artists. Using the criteria you identified above, select your top three systems and engage in the free trial to see if the system will meet your needs. Record the trial login information and systems below along with any concerns and questions you may have. Use your notes to engage with the vendor sales representatives before you decide on a product.

Your Top Three Systems	Trial Login Information	Notes
1.		
2.		
3.		

### 3. Identify Your Budget

A full view of your start-up and ongoing expenses as well as the time and resources required to implement and manage your inventory system will allow you to make an informed decision when choosing your inventory management software.

	Software & Hardware		Labor
	Initial fees	Ongoing fees	# assistant/consultant(s) + hours per week/rate
Inventory Management System (paper-based, Microsoft product, or database)	\$		X X = people hours rate
Developer (if custom built)	\$		X X = people hours rate
Data Migration	\$		X X = people hours rate
Training	\$		X X = people hours rate
External Hard Drive or Server	\$		X X = people hours rate
Cloud Storage Space	\$		X X = people hours rate
Laptop, Computer(s)	\$		X X = people hours rate
<b>Total Costs</b>	\$	\$	



## 4. Put It All Together: Draft Your Inventory Management Plan

Once you have identified what inventory management system you will be working with, think about how you will integrate inventory management practices into your studio routines.

Inventory Management Plan		
<b>How often will you update your inventory?</b>	<input type="checkbox"/> Every time I create a new body of work <input type="checkbox"/> Every exhibition cycle	<input type="checkbox"/> Once every three months <input type="checkbox"/> Other <hr/>
<b>Who will update the records?</b>	<input type="checkbox"/> Me <input type="checkbox"/> Assistant/associate (how many)	<input type="checkbox"/> Family member(s) <input type="checkbox"/> Other
<b>Project estimated budget</b> <i>(refer to budget template on previous page)</i>	Equipment & Supplies: Initial fees: _____ Ongoing fees: _____	Labor: [# of staff/consultant(s)] x [hours per week] x [estimated rate]:

## 5. Assess

Adjust your workflow as needed, commit to following through with your inventory management goals, and revisit your plan as often as needed so that it is serving you.

Your Inventory Management System Should Be Able to Address the Questions Listed Below. Put Your System to the Test and Adjust as Needed.	
<ul style="list-style-type: none"> <li>» Do you have consistent information relating to your artworks in your inventory management system? (title, date, medium, dimensions)</li> <li>» Can you produce a report with the locations of all the artworks in your collection?</li> <li>» Do you know what artworks are currently on loan, consignment, exhibition?</li> <li>» Can you produce a checklist of works for each of your exhibitions?</li> </ul>	<ul style="list-style-type: none"> <li>» Are there artworks for which you don't have good photographic images/documentation?</li> <li>» Did you backup your database to a spreadsheet (CSV or Excel file)?</li> <li>» Have you made a copy of the database file and stored it on more than one device, in more than one location?</li> </ul>

# Worksheet: Digital Asset Management Planning

This worksheet is included in Chapter 7, "Managing Your Digital Image Assets" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

## 1. Identify

What you are saving, how often, where, and who is doing it. Once you have established this, you may wish to create a workflow outlining what steps are taken to manage your digital assets and by whom.

**What kinds of digital files are you managing? How much space are they taking up?**

**What devices are you backing up your files to? Where are they located?**

**Who will be responsible for the initial setup of your digital asset management plan and ongoing maintenance?**

Copy 1

Copy 2

Copy 3

**How often will you spot-check your backup devices to ensure your files are readable? Who will do it?**

**When do your external hard drives need to be replaced? Who will migrate the data?**

**If an artwork was created over more than one year, in which year folder will you file the work?**

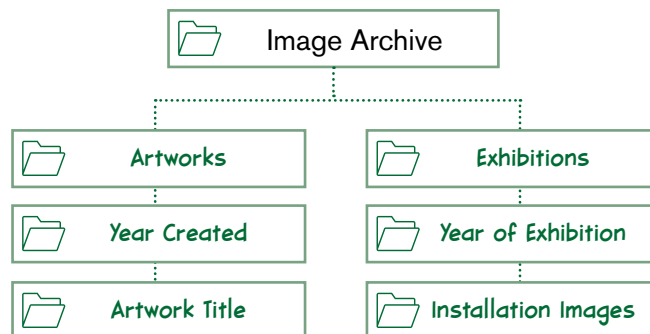
- ☐ In the year the work began
- ☐ In the year the work was completed

## 2. Arrange

Use the following File Structure Hierarchy arrangement grid to intellectually organize your image archive. You do not need to fill in every field: depending on the nature of your work and organizing logic, categories will vary.

Adapt this arrangement to create your own File Structure Hierarchy. Post your File Structure Hierarchy where you can refer back to it and work with this arrangement for a few weeks to see if it captures your needs.

### Example



### Create Your File Structure Hierarchy



### 3. Craft

Craft your File Naming Conventions as needed. Post where you can refer to it and work with this arrangement for a few weeks to see if it captures your needs. Refer to “[Sample File Naming Conventions for Artists](#),” on page 14 of the full [Guide](#) for more.

#### Images:

*Elements may include:*

- » Date(s) created
- » Creator
- » Inventory Number (Unique ID)
- » Artwork title (omit articles: a, the)
- » First initial, last name of photographer

#### Extensions:

- » Detail (det)
- » High-res (hr)
- » Low-res (lr)
- » Installations (install)
- » Image Number (so filenames are not redundant)

#### Press:

*Elements may include:*

- » YYYYMMDD
- » Publication
- » Interview-or-review
- » First 3 words of the article's title
- » Author's first letter of first name + last name

**Order your preferred File Naming Convention for each file type below, and any clarifying usage notes:**

#### Artworks

Example: YYYY\_Artist\_UniqueID\_ArtworkTitle\_Photographer\_det\_lr\_##

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#### Exhibitions and Installations

Example: YYYY\_Artist\_ShowType\_ExhibTitle\_Venue\_Photographer\_det\_lr\_##

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#### Press

Example: YYYYMMDD\_Publication\_ArticleType\_ArticleTitle\_Author

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### 4. Assess

Test the system for a few weeks to ensure that things are working properly and as expected with your asset management plan. Keep in mind that your plan may evolve as your studio practice evolves. Revisit your plan annually to ensure that it is clear, concise, and actionable. The most important part of this practice is documentation and consistency.

# Worksheet: Bibliography

This worksheet is included in Chapter 8, "How to Create Your Bibliography" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

Use this worksheet as a basic template for your bibliography according to *The Chicago Manual of Style*. Examples of each of the most popular types of sources are provided for reference.



## Books

**Last name, First name. *Title of Book*. Place of publication: Publisher, Year of publication.**

Example: Bernstock, Judith E. *Joan Mitchell*. New York: Hudson Hills Press, 1988



## Newspaper and Magazine Articles

**Last name, First name. "Title of Article." *Title of publication*, Date of publication.**

Example: Solomon, Deborah. "In Monet's Light." *New York Times Magazine*, November 24, 1991.



## Online Sources

**Last name, First name. "Title of Article." Name of Publication or Website, Date of publication or access date if publication date is unavailable. URL.**

Example 1: Szalai, Jennifer. "Ninth Street Women' Shines a Welcome New Light on New York's Postwar Art Scene." *New York Times*, September 26, 2018. <https://www.nytimes.com/2018/09/26/books/review-ninth-street-women-mary-gabriel-lee-krasner-elaine-de-kooning-joan-mitchell.html>.

Example 2: Roberts, Sarah, and Katy Siegel. "A Conversation about Joan Mitchell." Yale University Press Blog, February 12, 2021. <https://blog.yalebooks.com/2021/02/12/a-conversation-about-joan-mitchell/>.



## Audiovisual Sources

**Last name, First name. *Title of Work*. Directed or Performed by First name Last name. Original Release Year; City, State: Studio/Distributor, video release year. Medium.**

Example 1: Cajori, Marion, dir. Joan Mitchell: Portrait of an Abstract Painter. 1992; San Francisco, CA: Arthouse Films, 2016. Kanopy Streaming.

Example 2: Handel, George Frideric. *Messiah*. Atlanta Symphony Orchestra and Chamber Chorus, Robert Shaw. Performed December 19, 1987. Ansonia Station, NY: Video Artists International, 1988. Videocassette (VHS), 141 min.

# Worksheet: Preservation Plan

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This worksheet is included in Chapter 9, “Drafting a Preservation Plan” of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

Use this activity sheet to help build your preservation plan outline.

**List your collection of artworks by series, medium, or other classification and where they are located.**

If the list is expansive, summarizing the number and types of artworks will be just as useful.

**Outline how the artworks in the collection are utilized.**

Are the artworks loaned frequently? Used for teaching? Used for community cultural events?

**List the materials used to produce the artworks.**

Is the collection mostly oil-based prints, acrylic paintings, textiles, or black-and-white photographs? Mixed media or all of the above?

**Prioritize how and in what order the artwork and the materials need to be preserved.**

Determine which of the artworks are your top priority and make a ranked list. Priority can be based on number of artworks, sensitivity of artworks, importance, or what resources you have available. It's much easier for one person to sort photographs than move heavy artworks.



## Risk Assessment

### Looking at your current space, what are the potential risks to your collection?

Consider the light levels, fluctuating temperature and relative humidity, dust, pest issues, potential for accidents, and what your emergency plan is.

LIGHT LEVELS	TEMPERATURE + HUMIDITY
DUST	PEST ISSUES
ACCIDENT POTENTIAL	EMERGENCY PLAN

### Plan how to minimize the risks you identified in the risk assessment.

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## Storage and Access

**Organize your storage space or plan an organization method.**

Create a map of your space as if a stranger needed directions. This will make record-keeping easier!

## Lending, Exhibitions, and Reprographic Services

**Do you lend artworks? Exhibit them? What are your loan requirements? In this section define your requirements for your artwork's safe display and transport.**

## Supplementary Materials

Use this section to summarize your supplies, artmaking materials, notebooks, books, digital assets, other ephemera, and where they are located.

### List your available resources.

What materials do you have? How many people do you have helping? What amount of space do you have?

### List your priorities with available resources.

Given the resources you have, what is accomplishable? What is the most important thing to take on with your resources? For example, if you have five assistants for a month, you may want to prioritize sorting and moving artworks, which might not be as easy to accomplish with fewer people.

### Create a wish list of resources/projects.

What would you love to accomplish that you don't currently have the resources for? What are your resource needs? People power? Equipment? Space? Materials? This section will be particularly useful in preparing to ask granting organizations or supporters for the resources you need.

# Worksheet: Condition Report

This worksheet is included in Chapter 9, "Drafting a Preservation Plan" of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

Use this worksheet to document the current condition of the artwork or collection item. This condition form may not cover all the potential issues with an artwork, but there is space to add further information in the future. If you encounter difficulty describing a condition issue in words, a photograph can be taken and marked to document the issue. This task is not meant to be difficult or to require an expert-level knowledge of materials; think of it as a reporting tool that helps you identify and document artworks that require intervention before exhibiting.

ARTIST STUDIO:

LOCATION:

COMPLETED BY:

CONDITION REPORT DATE:

ROLE: ☐ Artist ☐ Artist's assistant ☐ Collection manager ☐ Other:

TITLE:

YEAR:

BRIEF DESCRIPTION OF ARTWORK (e.g., painting from "Flight" series):

MEDIUM (be as specific as possible):

## Handling considerations:

- ☐ Heavy ☐ Fragile ☐ Loose media  
☐ Hazardous materials ☐ Sacred materials ☐ Multiple components  
☐ Other, explain:

## Condition:

- ☐ Excellent ☐ Good ☐ Fair ☐ Poor, needs conservation/unstable

## Common Condition Issues

Below is a list of common condition issues that you may encounter in your work, depending on the medium. Composite objects (mixed media) may have condition issues in multiple columns. Refer to this table to complete your condition notes.

Paper / Books	Photos / Film	Paintings	Textiles	3D Objects	Digital / Time-based
Staining Tears Wrinkles/folds Fading Warping Structural/ binding issues Water damage Pest damage	Biological growth Staining Tears Wrinkles / folds Emulsion issues Fading Water damage Vinegar smell	Pest damage Tears Wrinkles Cracks Loose canvas Paint losses Fading Warped stretcher Pest damage	Tears Wrinkles/folds Holes Unstable stitches/ seams coming undone Fabric loss Fading Water damage Loose components Pest damage Staining	Missing components Cracks Breaks Losses Pest damage Water damage Biological growth	Playback issues Missing hardware Software issues Hardware issues No longer compatible with current technology

CONDITION NOTES:

WHAT IS THE ARTISTIC INTENT? HOW MUCH CHANGE IS ACCEPTABLE?

# Worksheet: Career Mapping

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This worksheet is included in Chapter 10, “Capturing Your Career Map and Timeline” of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide](#), 2022.

Use this worksheet to begin brainstorming the content and format of your career map, and determine who would be the ideal partner to join you on this journey.

**Who is your potential collaborator? List one to two people.**

**What is your relationship to your collaborator/s?**

**Briefly outline what you want them to know most about your goals—and what you are hoping to receive from them—throughout this process.**

You can reference “[Worksheet: Long-Term Goal Setting](#)” on page 1 of this [PDF](#) to help you complete this section.

Think about which of your artworks or bodies of work are most meaningful to you. Your map will not be able to cover everything, so choosing specific works, or knowing the specific story you want to tell, will help you to hone in on what matters most.

**To get started, list ten works, series, or bodies of work that are most representative of your overall practice or most crucial to your story.**

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

**Think about the structure of your narrative. How is your story organized in your mind?**

1. ☐ Chronologically
2. ☐ Thematically
3. ☐ Some other way (describe below)

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**How does your biography connect to your creative production? How personal do you want to get, and how much are you comfortable sharing?**

Your responses to these questions will help you and your collaborator establish guidelines for crafting your career map and narrative.

**What (if any) scholarship speaks best to your working process?**

**Are there other works of art (not your own) or published texts that have been especially informative for you?**



**Has anyone written about your work, and articulated insights that you find poignant or resonant?**

You can revisit [Chapter 8, “How to Create Your Bibliography,”](#) on page 104 of the full Guide, and [“Worksheet: Bibliography”](#) on page 21 of this PDF, to help you complete this section. List selected bibliography.

**Where and how do you envision these conversations taking place? Will it be private, perhaps in your home or studio, or in a context-enriching location?**

Consider spaces that you feel will help your collaborator understand the full scope of your work, and jot down your ideas.

**How do you envision sharing your story? Select all that apply.**

1. ☐ Talk or exhibition, with an audience
2. ☐ Public or private screening of your recorded interview
3. ☐ Selection of images of your work or personal reflections shared on your website and social media accounts
4. ☐ Email blast or newsletter to friends and family
5. ☐ Other community outreach (describe below)

# Worksheet: Estate Planning Questions for the Artist

This worksheet is included in the End Matter of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

This questionnaire, which was originally developed for the *Estate Planning Workbook for Visual Artists* is included here to encourage you to consider your legacy in a larger context and to prepare you for conversations with an estate planning attorney. For more information, see the *Estate Planning Workbook for Visual Artists*, available at [joanmitchellfoundation.org/professional-development](https://joanmitchellfoundation.org/professional-development).

## I. Legacy

**How do you want to be remembered?**

**How do you want your work to be remembered?**

**Do you want your work to be protected? How?**

**How do you want your work to be presented, collected, or sold?**

**What do you think your impact has been, however you define it? What would you like it to be?**

**Do you want or intend for your work to generate income for others?**

**Do you want to support any particular group, location, or charity?**

**Who could be a steward for your legacy?**

## II. Inventory/Valuation of Your Artwork

**Do you have a current written inventory of all the artwork you have created?**

☐ Yes ☐ No

**Does it include all the components recommended by the CALL program?**

☐ Yes ☐ No

**Did someone assist you in its creation and/or do you need further assistance?**

☐ Yes ☐ No ☐ Need further assistance

**Do you have a current written inventory of all the artwork you have sold, gifted, or bartered?**

☐ Yes ☐ No

**Do you have a current written inventory of all original works in your collection made by other artists?**

☐ Yes ☐ No

**Do you have computer backups and/or hard copies of digital works?**

☐ Yes ☐ No

**Will your digital work, websites, cloud storage, or other online activity be accessible?**

☐ Yes ☐ No

### III. Significant Business Relationships

#### Are you represented by an agent or manager?

☐ Yes ☐ No

If yes, who? What is your agreement with this individual?

Have you defined this relationship  
in a written contract?

☐ Yes ☐ No

Do you have a copy of  
this contract?

☐ Yes ☐ No

#### Do you currently have a relationship with a gallery/dealer/publisher/record company/record publisher/film company/film producer, etc. who shows/distributes/produces/publishes or sells your work?

☐ Yes ☐ No

If yes, what work have you licensed/consigned/assigned/sold, and to whom and under what conditions? Do you have those agreements in writing?

#### Do you keep a list of the artworks that are on loan or on consignment?

☐ Yes ☐ No

If yes, could an executor easily locate it?

☐ Yes ☐ No

Current location:

**Are there other gallery/dealer/publisher/record company/record publisher/film company/film producers who have shown/distributed/produced/published or sold your work in the past?**

☐ Yes ☐ No

If yes, to whom and what work? What has subsequently happened to that work?

**Have you ever had any of your work appraised by a professional?**

☐ Yes ☐ No

By whom? Do you still have copies of any such appraisals?

**Has any of your work ever been sold at auction?**

☐ Yes ☐ No

What auction house and who purchased the work?

Was it a charitable auction?

☐ Yes ☐ No

**Do you have in your possession contracts such as location releases, image releases, synchronization licenses, image licenses, collaboration agreements, gallery consignment contracts, etc? For which project(s) and with whom?**

## IV. Storage & Maintenance

**Do you currently have a dedicated studio space?**

☐ Yes ☐ No

Address: \_\_\_\_\_

**Own or rent? What is the lease term?**

☐ Own ☐ Rent

Terms: \_\_\_\_\_

**Do you currently have dedicated storage space?**

☐ Yes ☐ No

Address: \_\_\_\_\_

**Own or rent? What is the lease term?**

☐ Own ☐ Rent

Terms: \_\_\_\_\_

**Have you made arrangements for the maintenance and storage of your work pending its distribution?**

☐ Yes ☐ No

**Does your artwork require unusual storage, preservation, maintenance, or care?**

☐ Yes ☐ No

**Have you made any arrangements to insure your work?**

☐ Yes ☐ No

Insurer: \_\_\_\_\_

**Have you made arrangements for the maintenance, storage, and distribution of your art-making equipment and supplies?**

☐ Yes ☐ No

**Have you estimated the total cost of your planned disposition of your art, equipment, and supplies after your death (storage, distribution, conservation)?**

☐ Yes ☐ No

**Do you currently have insurance on:**

☐ Your Studio ☐ Your Artwork

☐ Other/Home/Etc

At what values? \_\_\_\_\_

**Do you have an insurance policy or other specially designated funds to pay for any such artwork-related estate administration costs?**

☐ Yes ☐ No

Insurer: \_\_\_\_\_

## V. Preservation Plan

**Do you have a preservation plan that describes the unique care and maintenance needs for your artwork, books, digital assets, and ephemera?**

☐ Yes ☐ No

**Have you clearly identified what artwork/s need to be preserved?**

☐ Yes ☐ No

**Have you identified a plan for handling site-specific works/happenings/installations/performances?**

☐ Yes ☐ No

**Do you want the site-specific works/happenings, installations, and/or performances to be restaged or reproduced? If so, have you included the specific instructions and/or sketches on how to recreate the work in your inventory?**

☐ Yes ☐ No

**Have you indicated which works are irreplaceable and are not to be conserved or displayed if an exact replica cannot be located?**

☐ Yes ☐ No

**How do you intend to conserve your timed-based media works?**

## VI. Gifts & Bequests

**Do you wish to make specific bequests of your artwork to certain individuals in your will?**

☐ Yes ☐ No

If yes, to whom?

**If you are not leaving your artwork to family and/or friends, have you considered other means of ultimately distributing your artwork after your death, such as through a charitable organization?**

☐ Yes ☐ No

If yes, which charitable organizations?

Have you notified and received approval from the donee organization regarding your planned bequest(s)?

☐ Yes ☐ No

## VII. Trusts & Foundations

**Have you considered a trust to manage your collection?**

☐ Yes ☐ No

**Do you have a relationship with an institution, nonprofit, school, program, or other entity that could be a partner in your legacy?**

☐ Yes ☐ No

If yes, with whom?



## VIII. Copyright Issues

**Have you ever licensed, assigned, or given away a copyright?**

☐ Yes ☐ No

If so, to whom and under what circumstances?  
Is it in writing?

**Have you ever registered a copyright?**

☐ Yes ☐ No

Do you have a current listing of the copyrights that you have registered?

**Have you ever donated an artwork but not the copyright along with it?**

☐ Yes ☐ No

**Do you control the copyrights of any works produced by others?**

☐ Yes ☐ No

**Did you create any projects or works with a collaborator?**

☐ Yes ☐ No

If yes, do you have an agreement governing the collaboration?

☐ Yes ☐ No

**Could your executor find records of the copyrights you own (in works created by you or by others)?**

☐ Yes ☐ No

Current location:

**Do you want to give more than one person the copyright interest in individual works?**

☐ Yes ☐ No

Grant copyright to:

**Is there anyone in your immediate family (spouse, children, grandchildren) that you would *not* want to be able to control your copyrights?**

☐ Yes ☐ No

Decline copyright to:

**Have you addressed how unfinished works are to be treated?**

☐ Yes ☐ No

**Can a third party finish your work?**

☐ Yes ☐ No

If so, whom may do so and under what circumstances? Is it in writing?

**Do you have specific instructions or restrictions on how your works may be used or licensed?** e.g., cannot be sold, commissioned books in the same series, music performed at certain venues, etc.

☐ Yes ☐ No