

# Trends in Family Philanthropy 2025 Report: Exploring the Main Findings Resource List

## **Description**

What does the family philanthropy landscape look like? How has it changed across the last decade, and what do those changes mean for the field?

Join us as we discuss the findings of the <u>Trends in Family Philanthropy 2025 report</u>. We will explore:

- The changes in philanthropic focus for many family philanthropies
- How grantmaking practices are evolving, and whether community needs are coming to the fore
- How philanthropies are learning about new ideas and approaches
- The changes in family dynamics, shifts in how the next generation are being engaged, and the factors that sustain and impede family engagement
- Changes in the make-up of boards
- What the findings suggest about future trends

There will be time at the end of the session for Q&A.

#### About the Trends report

The Trends survey captures and tracks leading trends in the field of family philanthropy. Conducted every five years, this research identifies emerging issues, changes in funding priorities and governance practices, innovative approaches to giving and decision making, and anticipated future giving patterns and practices among US-based philanthropic families nationally. Ultimately, it aims to equip donors with data they can apply to their decision making.

Trends 2025 is the third iteration of the report and is available to download here.

## **Replay Link**

View the webinar replay here.

### **Resources**

- <u>A Guide to Meaningfully Engaging Next Generation Adults in your Philanthropy</u> (NCFP, 2024)
- Balancing Purpose, Payout, and Permanence (NCFP, 2020)
- NCFP's Guide to Effective Family Philanthropy (2023)
- Overcoming Psychological Barriers to Giving (NCFP, 2024)
- Philanthropy in Complex, Multigenerational Families (NCFP, 2022)
- Trends in Family Philanthropy 2025 Report (NCFP, 2024)

### Panelist Organizations

- Bank of America
- National Center for Family Philanthropy

#### **Upcoming Events**

- <u>Trends in Family Philanthropy: A Houston Funder Convening</u> (Jan 29)
- <u>Fundamentals of Family Philanthropy Webinar: Laying the Foundation: Defining Family and its</u> <u>Role</u> (Feb 11)
- <u>Community Foundations Network: Engaging Next Generation Adults and Structuring your</u> <u>Advising Services</u> (Feb 13)
- <u>BIPOC Leaders Peer Network: How Solidarity and Connection to Philanthropic Affinity Groups</u> <u>can Support your Work</u> (Feb 20)
- <u>Fundamentals of Family Philanthropy Webinar: Laying the Foundation Part Two: Governance</u> <u>Structures and Considerations</u> (March 11)
- <u>Fundamentals of Family Philanthropy Webinar: Laying the Foundation Part Three: Aligning your</u> <u>Vehicle(s) with your Values</u> (April 8)

Access more resources through NCFP's Knowledge Center, and see upcoming events and programs.

# **Featured Speakers**



**Miki Akimoto** is the Chief Impact Officer at the National Center for Family Philanthropy (NCFP). In this role, she partners with the CEO to implement NCFP's strategic plan, enhance sector partnerships, and ensure a strong measurement and evaluation plan. She aligns and integrates NCFP's revenue, relationship management, and program strategies. Miki oversees NCFP's programs and development teams.

Miki has a long professional history in the philanthropic sector. Most recently, she served as a Senior Philanthropic Strategist at Bank of America's

Private Bank. In that role, she provided consultation and support for families, foundations, and major nonprofits regarding their governance, grantmaking, and impact strategies. Prior to joining Bank of America, Miki was Vice President and then Acting President of Philanthropy Massachusetts, the regional association of foundations, corporate givers, and other donors in Massachusetts and New Hampshire. She also served as the first Director of Grants Management for the Annie E. Casey Foundation, and as a program officer at AmeriCorps.

Miki is actively involved in the philanthropic community both nationally and locally. She serves as the Chair of the board of the Full Frame Initiative, and as President of the Third Sector Holdings board. Past board experience includes the Lenny Zakim Fund, Asian Americans/Pacific Islanders in Philanthropy, YWCA Boston, and the Boston Foundation for Architecture. She is also a co-founder of the Saffron Circle, the first Asian Giving Circle in Massachusetts.

Miki holds a Bachelor of Political Science degree from Stanford University, and lives in Medford, Massachusetts. In her spare time, she bakes, reads, and travels to far flung places whenever she can.





**Erin Hogan** is a Private Philanthropy Executive for Bank of America' Philanthropic Solutions business. With 20 years' experience in the philanthropic and nonprofit sector, Erin oversees the regional philanthropic business across numerous markets, working closely with philanthropic individuals and families, private foundations and nonprofit institutions on all aspects of giving.

Prior to joining Bank of America, Erin served as an executive director of the Philanthropy Centre at J.P. Morgan Private Bank, where she advised individuals,

families and institutions on matters of mission, governance, impact and legacy. Erin also has managed grantmaking programs on behalf of private foundations in the areas of education, health and community development, and worked closely with public charities on strategies to strengthen organizational capacity, lever- age philanthropic partners and maximize impact.

Erin's previous experience includes academic research and government consulting for a variety of public health and safety programs. As a research manager at Columbia University's Mailman School of Public Health, Erin supervised research in emergency preparedness, infectious disease control and occupational health and safety. Prior to that she worked for a Washington, D.C. consulting firm focusing on matters of public health and environmental health and safety.

Erin currently serves on the boards of the Smithsonian Institution's Science Education Center, the Northern Virginia Community College Education Foundation and the Virginia Funders Network. A former paramedic, Erin holds a Master of Public Health degree from Columbia University and a Bachelor of Science degree from The George Washington University.



Nicholas (Nick) Tedesco is the President and Chief Executive Officer of the National Center for Family Philanthropy (NCFP). NCFP serves as a hub of learning, connection, and collaboration designed to resource and activate a community of families to be intentional philanthropic stewards. Nick is a passionate advocate for philanthropy and brings over a decade of experience partnering with donors and their families to establish and meet their giving goals.

Prior to joining NCFP, Nick served as a Senior Advisor in the J.P. Morgan

Philanthropy Centre where he provided clients with insights and services to help meet their philanthropic objectives through innovative advice, thought leadership and opportunities for learning and collaboration.

Previously, Nick served as a Relationship Manager at the Bill & Melinda Gates Foundation, where he helped launch the Giving Pledge—an effort led by Bill and Melinda Gates and Warren Buffett to encourage the world's wealthiest individuals and families to commit the majority of their wealth to philanthropy. In this role, Nick managed relationships with current and prospective members of the pledge, as well as their staff and advisors. He helped to connect global philanthropists with one another in effort to exchange knowledge and encourage collaboration.



Nick began his career in the social sector as the Deputy Director of the Children's Health Forum—a national nonprofit focused on the prevention and eradication of childhood diseases that disproportionately impact underserved communities.

Nick was named to the inaugural Chronicle of Philanthropy 40 Under 40 ranking in 2016 and the Nonprofit Times Power & Influence List in 2024. He was also named by Inside Philanthropy as the Best Guide to Family Philanthropy in 2023. He has been quoted in the New York Times, Wall Street Journal MarketWatch, Time Magazine and other notable publications.

Nick received a B.A. from Villanova University and resides in Washington, D.C.

