



Approach Training for Professionals

Facilitated by Andine Sutarjadi, Director, 21/64

20th & 21st February 2024

Chalhoub Group Offices, Building 10, Dubai Design District (D3), Dubai, UAE

Summary:

This interactive, in-person two-day certification programme was led by Andine Sutarjadi, expert facilitator and director at [21/64](#), who helped train attendees (including individual philanthropists, corporate giving professionals as well as advisors to philanthropists) acquire the personal skills, generational awareness, and technical tools to work more effectively with next-generation funders and multigenerational family enterprises. Attendees learnt 21/64's proven methodology for engaging individuals, families, and institutions at the intersection of values and governance.

Some benefits to attendees of the training included understanding assumptions around family, wealth, and philanthropy, acquiring fresh facilitation techniques for building better engagement, learning to better facilitate productive conversations on values and legacy, acquiring research and resources on engaging the next generation, as well as interacting with peers in the space and expanding their networks.

The Approach Training is a globally recognised certification programme that explores the human dimension of work with next generation and multigenerational family philanthropy and enterprises. The programme is specifically designed to help attendees engage donors and clients in important and often intricate conversations on values, governance, legacy, and resource allocation, whether they are new to the field or a seasoned advisor adapting to new modalities of work in this everchanging world.

On Day 2 of the training, the group was joined by Michael Chalhoub, President of Strategy, Growth, Innovation & Investment and Joint Ventures at Chalhoub Group, a trusted corporate partner of the Pearl Initiative, who engaged in an informal interview and fireside chat with Andine. Michael shared with members of the training how he came to be involved in the Chalhoub family enterprise and philanthropy, as well as values and lessons that he has learned and is bringing into his work now. Michael also spoke about how his personal values and vision for impact align with the family business and how he envisions the Chalhoub Group's legacy will live on to the next generation.

Key takeaways:

- The group consisted of individual philanthropists and giving professionals that were able to learn, connect, and grow from each other.
- A multigenerational approach to engaging with families and donors which involves:
 - Unpacking our own assumptions and meanings around family, financial resources, and philanthropy. Here the group explored in more depth about what philanthropy means to them, issues that they individually are passionate about, and how their childhood formed their values, in addition to many other questions that engaged the group deeper in thinking about philanthropy. Becoming aware of these assumptions and assigned meanings and how they influence a donor and an advisor's work is important in being able to advise more objectively.
- Identify and helping a donor visualise what they are inheriting from previous generations apart from monetary resources such as, stories, events, values, and messages and ideals about financial resources and allocation philosophy. How does all this influence the way they give?
 - What am I inheriting? + Who am I? = What do I want to do about it?
 - Inheriting and giving of your: time, talent, treasure, and ties – what falls under each of these?
- The *Action Research Process* which is a step-by-step method to better consult philanthropists and family offices. The process involves multiple stages including a data collection stage wherein an advisor must learn to ask the right questions and recognise and withhold their own preconceived assumptions. Subsequent steps in the process include the feedback stage, the action planning and intervention stage, and the evaluation and next steps stage.
 - Instead of being the expert, it is important to go in as a consultant and ask the right questions to understand a client or donor's needs.
 - Illicit solutions to come from them.