



Lumina Engagement

**Increasing philanthropic success with
development officer behavioural insights**



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Coaching and Consulting

Enhance your donor engagement outcomes through a greater understanding of the strengths and potential blind spots of your development officers at each stage of the fundraising cycle.

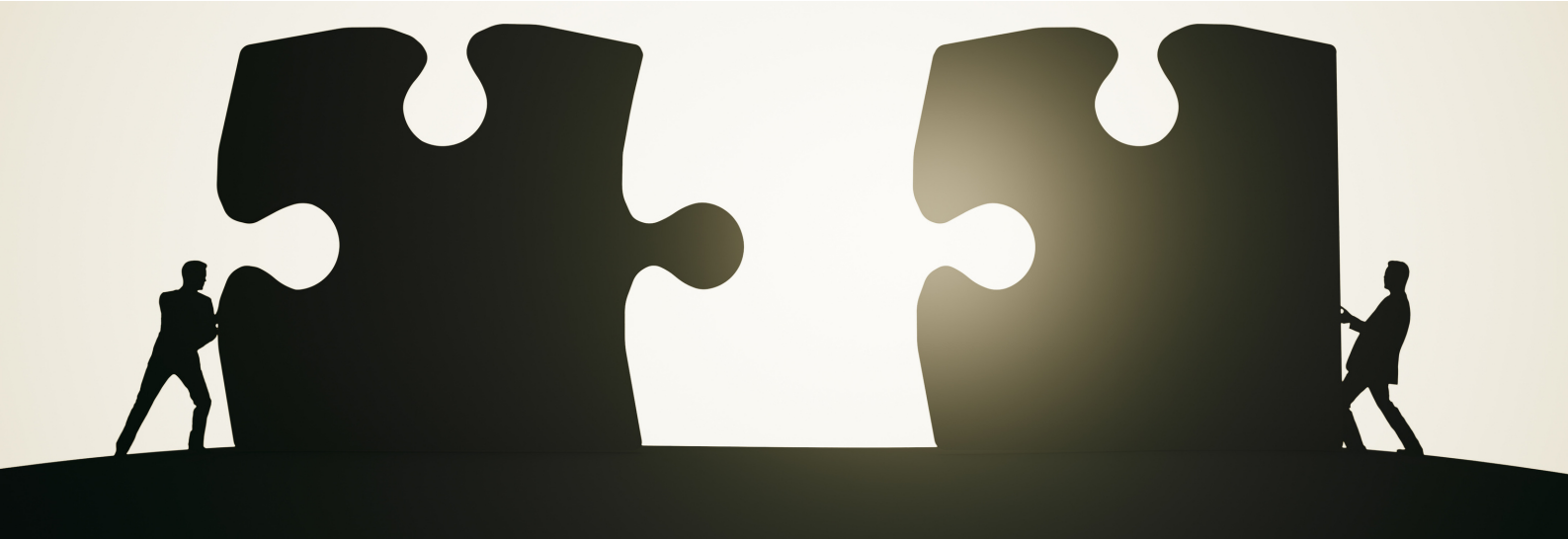


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Lumina Engagement

Insights at every stage of donor engagement



Lumina Engagement scientifically enables you to develop your fundraisers and therefore grow your philanthropic income.

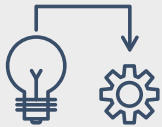
By understanding how your fundraisers' unique strengths support each stage of the donor continuum, and mitigating the impact of their overextensions, you can increase the success of your engagement efforts and close more gifts.

Whether you're a frontline fundraiser or a fundraising leader with a large team, Lumina Engagement will have applications for you.

Why Lumina Engagement?



Assesses how an individual's personal qualities will affect the way they are likely to perform at each stage of the fundraising cycle. Highlights why fundraisers can become stuck at certain stages and how to move forward.



Creates self-awareness about how personality influences fundraising outcomes.



Gives professionals the skills and confidence to approach donor engagement naturally and collaboratively by focusing on existing strengths and revealing hidden potential.



Assists fundraisers to stay in alignment with prospective donors' needs, helping to build relationships which continue to strengthen after the gift has been received.



Provides fundraising leaders with the framework they need to inspire performance and enable personal development.



Creates a shared language that supports team learning and collaboration, and aids fundraising leaders and managers in becoming active team coaches.

Benefits

Lumina Engagement gives fundraisers greater self-awareness. It answers the questions: What are my preferences? Where are my bright spots and blind spots? What do I overdo and what do I not do enough of? This facilitates personal and professional development which enhances performance.

Recognise and celebrate individual strengths and the diversity of styles each fundraiser brings to their work with donors and stakeholders.

Support fundraisers' ability to reflect on and adapt their styles as they build relationships with donors, increasing individual performance.

Create an environment of mutual support through better understanding between team members.

Establish the context for collaborative learning, improving overall team performance.



Recruit new fundraisers knowing that you can quickly recognise strengths and weaknesses and implement effective training and development plans.

How it works

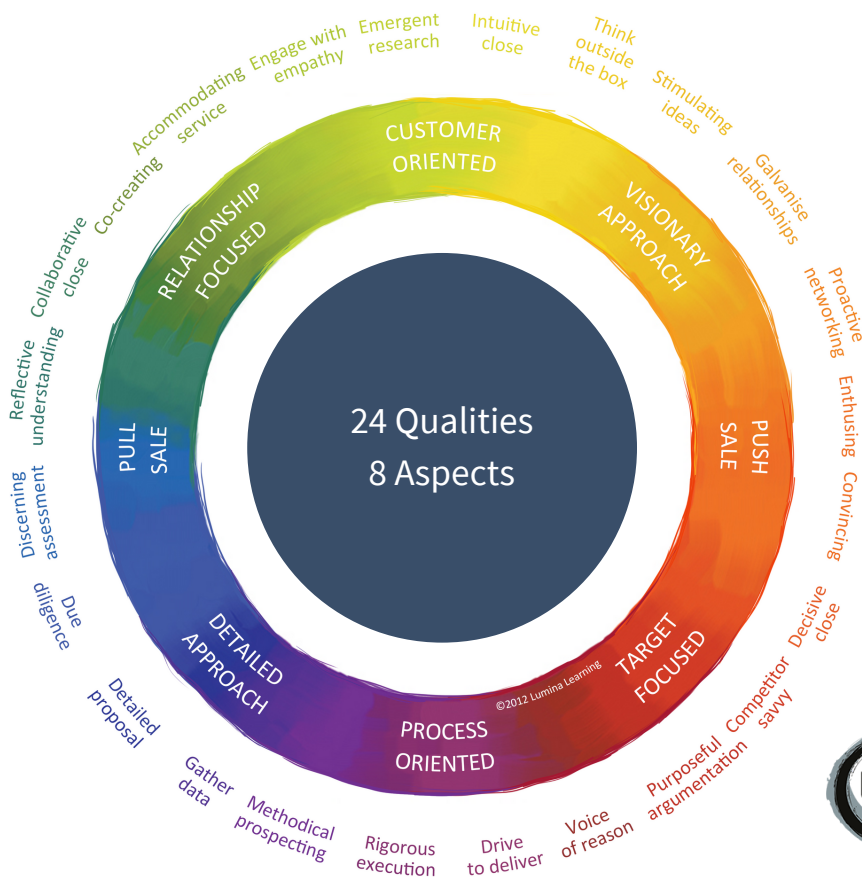
24 Qualities and 8 Aspects

Based on a well-tested psychometric with high validity and reliability developed by Lumina Learning, Lumina Engagement combines a six-stage engagement model with psychological insights that has been translated to the philanthropic context and the fundraising cycle.

Measures 24 strengths or *qualities*, which are plotted around the outside of a Mandala.

24 qualities group into 8 approach styles or *aspects*, displayed around the inner ring.

Opposite aspects face each other across the Mandala, e.g. *Relationship Focused* is opposite *Target Focused*.



24 qualities are measured separately, acknowledging that an individual can be high (or low) on both ends of the personality continuum.

For example, a fundraiser who successfully drives gift discussions using *Decisive Close* may also have strength in *Co-creating* with the donor.

This paradox is embraced and an individual's uniqueness is valued without generalising or stereotyping, creating a non-judgemental context.

How it works

8 Aspects and 4 Colours

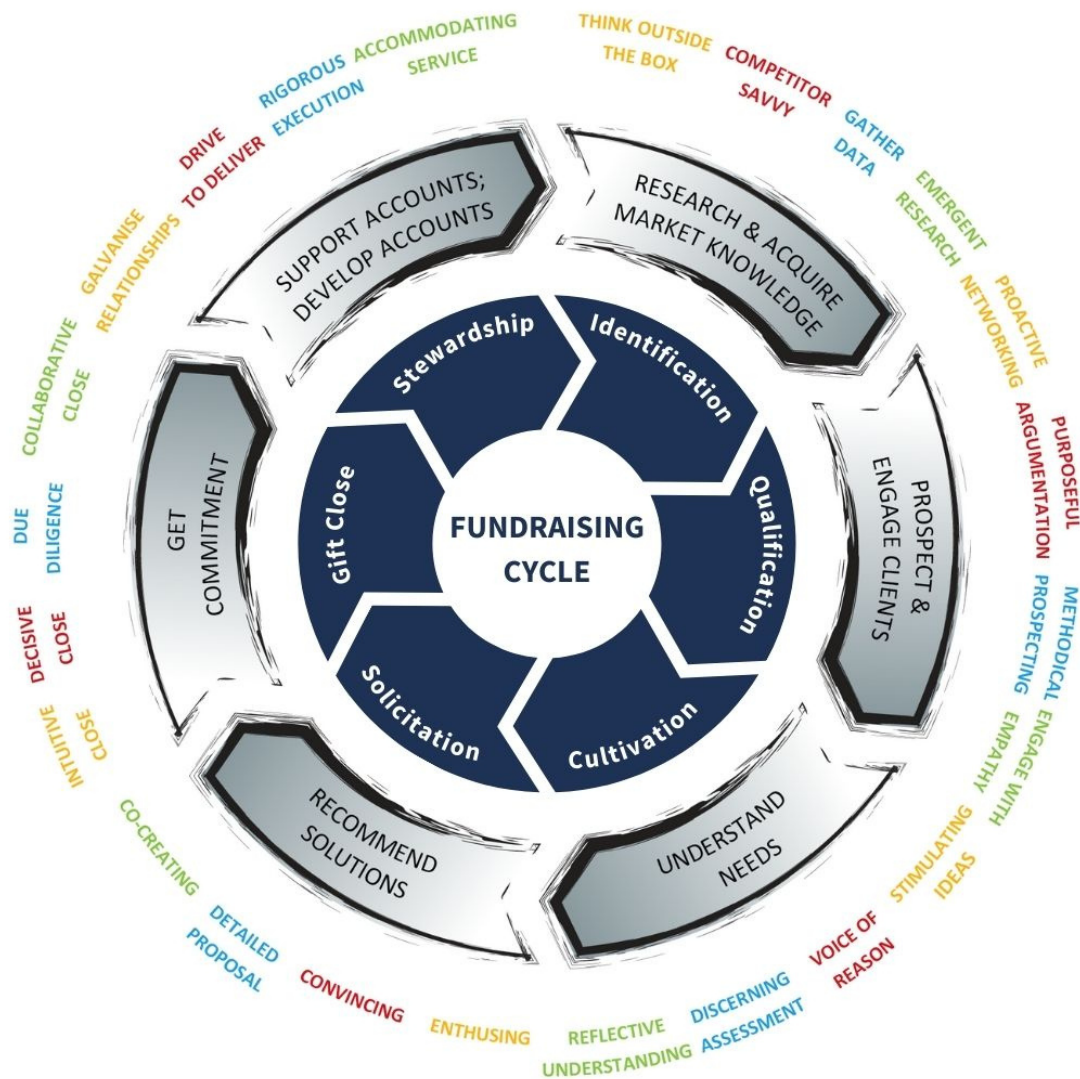
The 8 aspects are grouped into 4 colours, providing a simple visual representation. While fundraisers may have a preferred style or styles, they may use qualities from a variety of colours depending on the context or situation and can develop qualities that they use less frequently.



Fundraising cycle insights

Qualities and Colours at each stage of the fundraising cycle

The 24 qualities are also mapped to a 6-stage sales cycle, roughly equivalent to the six stages of the major gift cycle.



There are 4 qualities, one of each colour, associated with each fundraising cycle stage.

Fundraisers will use the qualities that come naturally to them but they may need to develop those that they find more effortful.

Individuals gain insight through understanding which of their qualities they use more or less of at each stage.

Through greater awareness, fundraisers can choose to dial up or down qualities based on who they are engaging with.



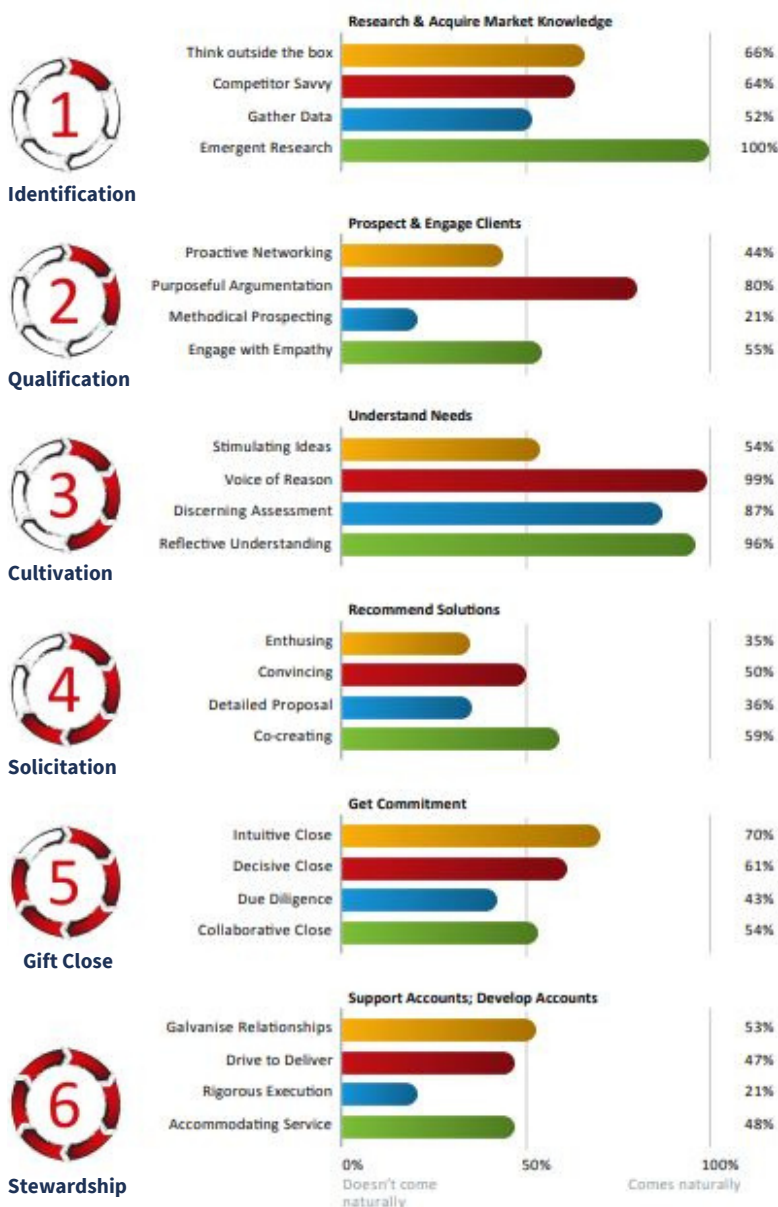
Portrait features

Effective qualities

The Lumina Engagement Portrait provides a measure for all 24 qualities that a fundraiser uses effectively throughout the fundraising cycle. These are qualities that come naturally or have been developed and which serve the individual well.



Effective Engagement Qualities



The Portrait displays the level to which an individual has claimed to use each quality in an easy-to-view visual. This enables the fundraiser to understand the qualities that they use most often and to discover those they draw on less frequently.

Insights facilitate reflection on what is working well or is less effective, allowing the fundraiser to experiment with other qualities. It may highlight an area for development via coaching, mentoring, buddying or training.

In this sample Portrait, the fundraiser is low on *Rigorous Execution*. This can impact how she stewards her donors, and when combined with limited *Methodical Prospecting*, this may result in a lack of new potential prospects in the future.

A key learning is how a fundraiser can effectively align their approach to that of their donors. Engaged donors and increased performance will result from the changes fundraisers implement from this greater self-awareness.

Portrait Features

Overextended qualities

Within a rapidly changing and complex world, fundraisers are time poor and working under high stress conditions. The relationship with the donor may be impacted when the fundraiser relies too heavily on favoured qualities or by overreacting when stressed.



Each of the 24 qualities has a flip-side! The Lumina Engagement Portrait identifies what happens when an individual overuses a quality.

Overextending can occur due to internal or external stimuli. Reviewing the Portrait with a qualified practitioner helps the individual to understand what may trigger an overextension, and this is the first step towards managing it effectively.

This sample Portrait illustrates a fundraiser who overextends in the effective quality of *Decisive Close*, finding herself using *Forced Close*, potentially damaging the relationship with the donor and the current gift discussion.

Increasing awareness allows a fundraiser to make the choice about how to react and behave, allowing them to refocus on the donor relationship.

Overextended Engagement Qualities



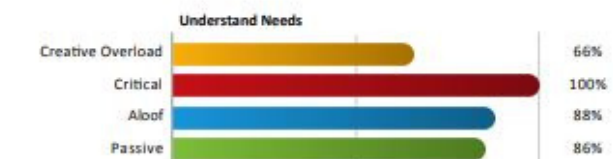
Identification



Qualification



Cultivation



Solicitation



Gift Close



Stewardship



Case studies

Illustrating Lumina Engagement within the donor continuum



Amara finds her blue quality of *Gathering Data* very useful in identifying new potential prospects and developing an initial engagement strategy based on her research. However, she can overextend this quality to *Analysis Paralysis* and find that she keeps researching in order to develop the perfect way to approach a donor, and fails to reach out to the prospective donor to make the initial call. She becomes stuck in the identification stage and is not achieving her metrics. Through working with her coach, Amara has developed a strategy to remind herself to stop researching and to make the call.



Félix is strong in inspiring yellow. He particularly enjoys engaging with donors who have lots of fascinating ideas around how best to invest their philanthropic gifts. Félix measures highly for *Stimulating Ideas*. However, Félix has found that this can sometimes create unexpected consequences. He has previously recommended a complex gift agreement that was difficult to manage, resulting in a dissatisfied donor. *Stimulating Ideas* have become *Creative Overload*. Félix now knows when to dial up his red *Voice of Reason* quality to ensure that his donor's needs are being met. He also checks in with a particular colleague who is strong in *Discerning Assessment* when he recognises that he is overextending.



Bae is a great fundraiser who closes lots of gifts. Her approach tends to be *Target Focused*. She is purposeful and competitive. She draws strongly on her commanding red qualities of *Convincing* and *Decisive Close* in the later stages of the gift discussion, and this style works well with many successful business people and philanthropists. However, she has found that gift discussions are more fruitful with some donors, particularly those from certain cultural backgrounds, when she uses green *Co-creating* and a *Collaborative Close*. Bae has worked hard to develop these skills and is proud of her success.

Practicalities

What your development officers can expect



Questionnaire & Portrait

144 questions, taking 15-20 minutes to complete.
Individual Lumina Engagement Portrait.

Debriefing

1 hour session to review and explore the Lumina Engagement Portrait with a qualified practitioner.



Individual Coaching

1:1 coaching to reflect on insights and to develop and implement a plan for change.

Team workshop

Half-day team workshop to understand each others' strengths and potential blind spots, and how the team can support its members for greater team impact.



Packages

Fundraiser Recruitment Package



Get new hires up to speed quickly. Identify newly hired fundraiser's strengths and possible shortcomings at each stage of the fundraising cycle. Facilitate an individual development plan.

- Lumina Engagement questionnaire
- Individual debriefing session on Lumina Engagement Portrait
- Individual development plan
- Three 1:1 coaching sessions (1 hour)
- Quarterly review of outcomes in first year

Fundraising Team Development



Develop your fundraising team. Uncover underutilised strengths and hidden talents. Determine individual training, coaching, mentoring or buddying needs. Create a shared learning environment that increases team success.

- Lumina Engagement questionnaire per team member
- Individual debriefing session on Lumina Engagement Portrait (1 hour)
- Half day team workshop
- One 1:1 coaching session per team member (1 hour)
- One follow-up session per quarter - individual (1 hour)
- One follow-up session per quarter - team (2 hours)
- Review of outcomes at end of year (qualitative and quantitative)

About me

Enabling insights for fundraising professionals



Following a 30-year career leading, developing and managing large teams in higher education fundraising, spanning two continents and three world-leading universities, I founded my coaching practice and fundraising consulting business in 2021.

My career in the sector started in the early 1990s at the University of Bristol, where I was Assistant Development Director and a founding member of the team that managed its first fundraising campaign. I subsequently spent over a decade at the University of California, Berkeley. As Director of Prospect Development I led a large team through transformational change in support of several billion dollar plus campaigns, within a highly complex and decentralised organisation.

In my most recent role, as Head of Prospect Information and Analysis at the University of Cambridge, I focused on developing several teams and effective programmes during a time of rapid growth and to aspirational goals. Mentoring and coaching have been an integral part of my own career success and in supporting the success of my team members.


I have particular expertise in fundraising metrics, the fundraising cycle, effective data management and reporting, analytics, prospect management and research, and visioning impactful transformational change. I am also fascinated by what makes fundraisers tick and become more successful.

I now specialise in working with leaders and aspiring leaders and their teams, with a focus on the higher education, charity and non-profit sectors in support of more efficient and effective fundraising programmes.

I have an MSc in Coaching and Behavioural Change and a Professional Certificate in Coaching from the Henley Business School at the University of Reading. I am accredited by the European Coaching and Mentoring Council at senior practitioner level, and abide by its Global Code of Ethics. I am trained in several psychometric and assessment tools, including Lumina Engagement and Lumina Spark.

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