Answering the “Now What?”: The Development of a Transdisciplinary Breast Cancer Survivorship Nonprofit Organization

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Answering the “Now what?”: The Development of a Transdisciplinary Breast Cancer Survivorship Nonprofit Organization

By
Vir-Iaesta Maniquiz Vergel de Dios

Claremont Graduate University
2024
Approval of Dissertation Committee

This dissertation has been duly read, reviewed, and critiqued by the Committee listed below, which hereby approves the manuscript of Vir-Iaesta Maniquiz Vergel de Dios as fulfilling the scope and quality requirements for meriting the degree of Doctor of Public Health with a concentration in Leadership & Management and certificate of Advanced Study in Evaluation.

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Abstract

Answering the “Now what?”: The Development of a Transdisciplinary Breast Cancer Survivorship Nonprofit Organization

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Vir-Iaesta Maniquiz Vergel de Dios

Claremont Graduate University: 2024

Although patients are living longer or are surviving breast cancer, the side effects of treatment still leave patients struggling with quality-of-life issues. The lack of whole-person care leaves patients unequipped after treatment is complete, searching for answers and a way to survive on their own. The unintended consequence becomes a dramatic shift from the weekly/daily medical appointments during active treatment to a silence that can be daunting for many to navigate. Living Your Truth Empowered, shortened to LYTE Foundation, is an anti-authoritarian minded and anti-hierarchal nonprofit created to address the needs of the growing breast cancer survivor population. LYTE is focused on six areas: charter network, education and training, research and evaluation, marketing, development, and partnerships. Each area is not meant to be inherently distinct, but rather work collectively to create a transdisciplinary approach to breast cancer survivorship care. LYTE Foundation, Inc. was incorporated on September 22, 2022, officially launched to the public on December 9, 2022, and received nonprofit 501(c)(3) status on May 4, 2023. LYTE is now in need of long-term organizational support.

The primary goal of this dissertation was to identify organizational best practices and provide LYTE Foundation’s leadership with tangible recommendations to implement. As such, the main project objective was to provide a strategic plan to LYTE Foundation’s Board of Directors on best practices for long-term organizational sustainability. Through my research, I encountered a lack of information surrounding organizational assessment rooted in anti-
hierarchal and anti-authoritarian leadership. To fill this gap, I developed WHOLE (Well-being and Health of Organizations, Leaders, and Employees) Assessment, a comprehensive framework I used to assess the health and long-term sustainability of LYTE Foundation through the lens of its employees and leadership. WHOLE combines Organizational Development Strategy, the McKinsey 7-S Framework, the PERMA Model, and Strategic Planning.

I developed WHOLE Assessment to examine LYTE at its current stage, in order to pinpoint ongoing successes and opportunities for improvement. I used a purposive sample of current LYTE leadership and employees, and included two organizational industry experts, as my data set. Data collection included ten semi-structured interviews and one focus group, totaling twelve participants.

Immediate results from the interviews covered the Leadership and Employees acronyms of WHOLE Assessment. Deeper analysis of the results brings WHOLE together—specifically the words Well-being and Health and how it relates to the entire Organization. To be inclusive, transparent, and vulnerable, one must be able to communicate. Focusing on being open, accountable, consistent, and purposeful in communications increases the chances of an inclusive work environment. Enacting transparency builds trust and a commitment to the organization. Collaboration is achieved by breaking down barriers. Finally, flexibility is achieved by leadership and employees being continuously communicative so that all workers believe themselves to be an integral part of the team.

Results of this study formed the final deliverable for this project—a strategic plan. I used the results from applying WHOLE Assessment as a jumping off point for setting up LYTE’s strategic plan.
By and large, my research emphasizes a shift towards a more holistic approach to employee wellbeing in the workplace. I created *WHOLE Assessment* to feature employee and leadership voices in a not-for-profit organization. Although *WHOLE* was created for a nonprofit organization, its application can be utilized by any organization looking to incorporate employee wellness in its overall systemic review. By highlighting employee wellness, organizations will develop a company culture based on high morale, leading to increases in structural effectiveness.
AUTHOR’S NOTE

Dr. Brett S. Goldberg (2022) included quotes from influential scholars and participants before the beginning of each section in his dissertation. I emulated this practice because the essence of LYTE is voices. LYTE Foundation was created to center patient voices in breast cancer survivorship, and for this dissertation, I wanted to highlight the voices of employees who are bringing LYTE to life. Voices are arguably the best way to express opinions. I aimed to capture some little part about LYTE Foundation and the valued individuals that dedicated their time in this dissertation. It takes a team to create something and a community to keep it going.

LYTE is a community with much promise.
“You can always overcome it, and if you're unable to overcome it, it's okay to ask for help. Tenacity is built on failures and successes. Tenacity is strengthened by those who you surround yourself with.”
-Participant 1, Student

DEDICATION

Getting through this dissertation would not have been possible without the support of my wonderful family—Rogel James and Nick (Lily Marie) plus my cats Tiger and Pineapple. RJ, you deserve this DrPH as much as I do for listening to me talk about my academic journey from my bachelor’s degree to my doctorate. Thank you for seeing beyond a loudmouth, know-it-all 15-year-old and sticking it through with me all these years. You are my soulmate. To my darling child—you were a tiny baby when I graduated with my Bachelor’s. You know almost nothing besides mom being in school. I hope I’ve done you justice in showing that you can be anything you want to be. Every day I am in awe of you, your strength, and your heart. Tiger and Pineapple, you can’t read so *direct eye contact and slowly blink*.

To my parents—Marileth and Hill Maniquiz. You have made me the woman I am today. Your values and beliefs have shaped my being, and I go forth as this person because of you. Mom, you have always been my biggest cheerleader when it came to school. You wanted me to be everything I could be and are always so proud of my accomplishments, big or small. I know I am always so busy, so maybe with the completion of this degree, I will listen to you now when you say, “Hindi ka ba pagod? Tama na, anak.” Dad, during our last few days together, quarantined in the hospital before you lost your ability to speak, you told me how proud you were of me and what I was doing with my life. I know you’re smiling down at me now, saying again, “Proud ako sa iyo, my first-born child.” Hanggang sa muli, dad. My in-laws—Roger and Rosemary Vergel de Dios. I asked you what would happen to us if I did a doctoral program and you told me to do it. You said that I should reach for the stars while you were still strong enough
to help with family obligations. Thank you for helping me be the best version of myself. To my sisters—we all know what it’s like to go to school full time while juggling full time work and other personal responsibilities. I am heartened to see dad’s work ethic in each of us. To Red—my first baby. You taught me love and a dedication to something other than myself. To Auntie Lily and Uncle Romy—thank you for sponsoring a little girl’s journey to America and always being there for whatever I, or my family, needed. No task was ever too small for you when it came to us.

To my four grandparents, all of whom are now gone. Thank you for being my first teachers and loving me completely. Mamang, Papang, Grandma, Grandpa—your legacy lives on. I carry you with me always. To all my aunts and uncles, who raised me just as much as my grandparents did—thank you for loving me like I was your own child. Uncle Val, if you were still here on earth, I know you’d be the loudest voice saying, “That’s my inaanak!”

I dedicate this work to every one of you. I am here today because of your unconditional love and support.
I get excited when I meet other brilliant people and hear their stories cause you can never judge a book by its cover.” – Participant 8, Board of Directors

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In September 2020, my dad passed very quickly from cancer. Then, I was rejected for two dissertation research projects. While struggling with my feelings of loss, I was reintroduced to Dr. Jessica Clague DeHart. That re-introduction led me to the most amazing people and opportunities.

I am so grateful to have met Dr. Clague DeHart. We built LYTE Foundation together and she has become my cherished mentor, and dare I say friend. She is my chair, but also someone I could lean on when handling professional and personal struggles. Slack holds so many of our secrets! Whenever I see a Crumbl cookie, I will always think about the surprise pink boxes that appeared at my house. As she always reminds me, one day we will be old and sitting next to each other on our rocking chairs, proud of what we’ve created.

Thank you to my friend Dr. Brett S. Goldberg, who kept me accountable. Sometimes, we’d be walking/eating lunch/what have you, and I would randomly ask a dissertation question, which he would so patiently answer. Other times, he would just listen while I ranted about my dissertation. Thank you for pushing me so hard to make this dissertation my own instead of giving credit to other people. You came into my life at the perfect time. I can’t go to Disneyland anymore without thinking about you and Gloria! Charmander thanks you for everything.

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Last, but certainly not least—thank you to every single person at LYTE Foundation. Your dedication to LYTE inspires me. You have not only helped me with my dissertation, but your passion for the work we do emanates in everything LYTE stands for.

I have always worked full-time while completing my doctorate. That balance of work, school, and personal life has been hard for me, but I am here today, grateful to have made it this far. Over the course of this program, I have lost loved ones, managed personal struggles, and stumbled to the finish line, but it is gratifying to be here today. My collective experience; personal, professional, and academic; has led me to where I am. As I wrap up this time of my life, I am excited to see where the next chapter takes me. Tapos na ako!
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“We’ve all done preliminary research, so we all know that what LYTE is doing is going to help a lot of people.”
- Participant 5, Student

INTRODUCTION

Breast Cancer Survivorship

The number of women diagnosed with breast cancer continues to rise annually and, due to treatments becoming more effective, the amount of breast cancer survivors is increasing exponentially. There are currently more than four million breast cancer survivors and five million are estimated by 2030 (American Cancer Society, 2022). However, when the celebratory bells fall silent and the pink confetti is swept up, these four million women are faced with their ‘new normal’. The physical and psychological collateral damage of successful cancer treatment is often overwhelming, and the rally cry against the acceptance of a ‘new normal’ is growing louder (Cheng, Wong, & Koh, 2016). The divide in results stemming from research and personal experiences of breast cancer survivors follows because of a lack of comprehensive programing. A community-centered, locally tailored program that is driven by the needs of breast cancer survivors, evidence-based and backed by continuing research, and involves local partnerships for effective resource navigation will not only fill the post-treatment silence but will also increase overall quality of life.

Need for Transdisciplinary Care

Passive communication by oncology experts of whole health survivorship recommendations, including lifestyle change, has not worked and, in fact, as little as 30% of survivors are meeting recommended guidelines (Rock et al., 2022). Not all breast cancer survivors know how and where to find recommendations needed for health survivorship, and of those that do, the majority do not know how to incorporate these recommendations into their personal lives. The disconnect between the research and personal experience of breast cancer
survivors, therefore, occurs due to a lack of comprehensive and effective community-centered and locally tailored programing that focuses not only on the what but also the how\(^1\). Although the combined work of awareness, prevention, and treatment services is likely the reason for an increase in breast cancer survivors, few organizations, if any, address post-treatment care in a personalized, comprehensive, and effective way. Breast cancer impacts a massive diaspora of women and men, each with unique individual and cultural needs. A survivorship organization solely dedicated to addressing those needs must be available to all breast cancer survivors, and it is essential that the organization be not for profit to be accessible to all, regardless of socioeconomic status.

**LYTE (Living Your Truth Empowered) Foundation, Inc.**

LYTE Foundation is a nonprofit 501(c)(3) organization that was created to address the needs of a nationally growing breast cancer survivor population. LYTE is focused on six areas: localized support networks known as a charter network, education and training on how to support breast cancer survivors utilizing wellness coaching, development of programming, continuous research and evaluation of programs and best survivorship practices, marketing of services, and partnerships with centers, hospitals, and advocates. Each area works collectively to create a transdisciplinary and inclusive approach to breast cancer survivorship care. It achieves this by helping establish evidence-based, community-centered, and locally tailored charters run by breast cancer advocates who are certified as community health and wellness coaches. Furthermore, a key difference between LYTE and other health and wellness coaching programs is that the certification and exam are no-cost to individuals who decide they want to start a charter and/or coach breast cancer survivors. With current health and wellness coaching program

\(^1\) Lee et al., 2011; Khan, Evans, & Rose, 2011; Fiszer et al., 2014; Stover et al, 2014; Carreira et al., 2017
costs ranging from about $4,000 to upwards of $10,000\(^2\), LYTE Foundation is removing the financial barrier for those who would like to better support breast cancer survivors.

LYTE Foundation, Inc. was incorporated on September 22, 2022, officially launched to the public on December 9, 2022 and received official nonprofit 501(c)(3) status on May 4, 2023. LYTE is now in need of long-term organizational support. As the Chief Operating Officer, it is my responsibility to maintain daily operations, support other senior executives and employees, and develop and implement policies that support the organization’s goals and policies. This dissertation is an extension of my role, responsibilities, and capacities as LYTE’s COO.

**Project Purpose**

The purpose of this dissertation is to provide recommendations for LYTE Foundation’s continued success by identifying organizational best practices through the development of a strategic plan. Utilizing the four theoretical frameworks; Organizational Development, McKinsey 7-S, PERMA, and Strategic Planning; I developed a conceptual framework titled the *WHOLE (Well-being and Health of Organizations, Leadership, and Employees) Assessment*. Chapter 1 will cover the background of breast cancer, the importance of survivorship in breast cancer, and a deeper explanation of LYTE Foundation. Chapter 2 explores the theoretical frameworks I used to develop *WHOLE Assessment* and pieces together the Entry, Diagnosis, and Feedback stages of *WHOLE Assessment* through my data collection tools, procedures, and analysis process. Chapter 3 focuses on my findings, specifically looking at the Leadership and Employee sections of *WHOLE Assessment* and the Solution stage. Finally, Chapter 4 includes a synthesis of my results, namely the Well-being and Health of the Organization sections of *WHOLE Assessment* and the Entry stage.

\(^2\) Examples of this include the following: The Wellness Effect, American Council on Exercise, Mayo Clinic, Susan Samueli Integrative Health Institute
There's going to be unique needs based on [a survivor’s] life and what's going on with them and what they experience during treatment and things like that. There's a distinct need within that survivorship population.

-Participant 9, Board of Directors

CHAPTER 1: LITERATURE REVIEW

Equity Gap in Breast Cancer Survivorship Care

Breast cancer impacts one in three women in the United States each year and is the second leading cause of death for women (American Cancer Society, n.d.). Due to increases in awareness, screenings, and treatment options, breast cancer deaths have decreased—leading to an increase in survivors with more than four million breast cancer survivors living currently in the United States and five million estimated by 2030 (American Cancer Society, 2022). However, when the celebratory bells fall silent and the pink confetti is swept up, these four million women are faced with their ‘new normal’. The physical and psychological collateral damage of successful cancer treatment is often overwhelming, and the rally cry against the acceptance of a ‘new normal’ is growing louder (Ganz & Hahn, 2008).

The current standard of care for breast cancer survivors provides a timeline for physical surveillance, but not whole health care. For instance, the American Society of Clinical Oncology (ASCO) provides guidelines for post-treatment surveillance and recommends a detailed survivorship care plan including a checklist section focused on general mental, emotional, and physical issues be given to breast cancer patients following completion of treatment. If the plan is followed and any listed issues are checked off, it is recommended for the patient to speak with their doctor or nurse (ASCO, n.d.). These recommendations not only put the onus of responsibility on the patient to identify their own symptoms rather than a discussion with a clinician and wide-ranging supportive measures, it also assumes an abundant clinical workforce at the ready to respond to the patients’ needs.
Follow-up care after treatment continues to focus on physical symptoms, guided by medical practitioners. Sisler, Chaput, Sussman, and Ozokwelu (2016) conducted a literature review of evidence-based recommendations on survivorship follow-up care of women with breast cancer. Results showed that annual mammograms and breast self-exam; management of long-term effects like cardiovascular health, fatigue, genetic counseling, and osteoporosis; and weight management and nutrition; are all part of common assessment plans. The same study found that distress, depression, and anxiety were not as rigorously studied and even though cognitive dysfunction was highly recommended as part of the assessment plan, the strongest recommendation was to self-manage the symptoms. Macdonald et al. (2023) provided a systematic review and meta-analysis of 39 publications which identified that although patients are living longer or are surviving breast cancer, the side effects of treatment still leave patients struggling with quality-of-life issues. Overall, the lack of whole-person care leaves patients unequipped after treatment is complete, searching for answers and way to survive on their own and manage post-treatment symptoms.

Even with the plethora of research highlighting the importance of lifestyle changes related to breast cancer prevention and survivorship, and the abundance of websites and organizations communicating these recommendations\(^3\), what breast cancer survivors often experience, and therefore engage in, post treatment varies greatly. Choi et al. (2020) found that current survivorship plans are useful when collecting demographic and summary data but fail at helpful follow-ups to care and do not address quality of life after treatment. Hartnett (2016) recommends health promotion and care coordination guidelines be added but admits that there

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\(^3\)Johns Hopkins Medicine, BreastCancer.org, Memorial Sloan Kettering, and even the California Department of Public Health all have survivorship care plans, but document the same generic information with no further survivor outreach.
are no formal plans to enact. Even hypothetical plans that could be enacted currently involve a clinical care team that is either non-existent or resource-limited, and again excludes the community and how that can support survivors from a holistic perspective. Given the extent of research in this area and the knowledge that exists on what needs should be managed, the greater breast cancer community has been overlooked until this point.

**Gaps in Knowledge and Critical Need**

Breast cancer organizations dedicate themselves to awareness, prevention, and treatment services but not always survivorship care. Comprehensive cancer centers promise ongoing care, but often fall short due to limited resources and a focus on ground-breaking treatments\(^4\). Community-based cancer clinics often have little to no resources for implementing survivorship programs (Fauer, Ganz, & Brauer, 2022). Unfortunately, when available, survivorship services that are offered at either comprehensive or community-based facilities may not be feasible, accessible, or appealing to all breast cancer survivors. Further, post-treatment care can be costly as the current model typically employs medical staff because follow-up recommendations still require continuous monitoring by oncology staff and/or a primary care physician (Gerber et al., 2012). Therefore, the unintended consequence becomes a dramatic shift from the weekly/daily medical appointments during active treatment to a silence that can be daunting for many women to navigate. This silence leads to fear, anxiety, and depression—which may manifest into physical health decline, avoidance of preventive care and follow up care of comorbidities and, in the worst case, cancer recurrence and progression\(^5\).

\(^4\)A general search of “comprehensive breast cancer centers” yields results such as innovative technology (3D mammograms, ductology, DEXA bone density tests), unique team members (social workers, occupational therapists, psychologists/psychiatrists, and dietitians), and tout overall health treatments and unique treatment plans, but focus on physical conditions related to breast cancer.

\(^5\)Amir & Ramati, 2002; Khan, Ward, Watson, & Rose, 2010; Krebber et al., 2014; Thekdi, 2015; Burg et al., 2015
Breast Cancer Nonprofits

There are over 1.7 million nonprofits in the United States (Ensor, 2022). Cause IQ (2020) states that there are 1.4 million active 501(c)(3) nonprofits collecting taxable donations. Charity Navigator is an independent charity watchdog that evaluates non-profits. When searching for ‘breast cancer’, a total of 645 results appears (Charity Navigator, 2022). A general dive into that list shows that many organizations⁶ focus on prevention and treatment, but not on post-treatment care⁷. Although breast cancer impacts people of all genders, heavy evidence shows it disproportionately impacts females more than males (American Cancer Society, n.d.). Using this lens, there are over 47,000 charities focused on female-specific causes, comprising only 3.3% of all total charitable organizations (IUPUI Women’s Philanthropy Institute, 2019).

An innovative, multipronged approach to breast cancer survivorship care is critically needed. However, there currently exists a gap in knowledge regarding the most effective organizational development strategies for developing and implementing a transdisciplinary breast cancer survivorship nonprofit organization. Therefore, to effectively meet the needs of breast cancer survivors, transdisciplinary methods will be needed to build a strong and sustainable organization that provides comprehensive and effective community-centered and locally tailored programing.

Transdisciplinary Breast Cancer Survivorship

Breast cancer survivorship resources are readily available, but it depends on how one would use that knowledge. A general Google search of ‘breast cancer survivorship organizations’

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⁶Organization names that included titles such as “detection”, “awareness”, “research fund”, “eradication” and the like led me to believe they are focused on prevention and treatment rather than post-survivorship care.

⁷The closest organization I found that listed care after treatment was Turningpoint Breast Cancer Rehabilitation Inc. in Atlanta, GA. Turningpoint still focuses on treatment and care immediately after remission, not on community-based care. Further, it employed mostly doctors, which leads me to believe they primarily focus on physical care, rather than other parts of overall health.
turned up results that were mostly about support groups. For example, Susan G. Komen (2022) was the first search result, and the webpage explains the pros and cons of support groups plus resources that include care during breast cancer treatment. CancerCare (2023), a nationally recognized organization and the second search result, was the most promising organization as its sole focus is on providing emotional and practical support to people with cancer. For instance, CancerCare offers a specific breast cancer post-treatment survivorship support group led by an oncology social worker for 15 weeks, but to qualify, one must have completed their breast cancer treatment within the last 18 months (CancerCare, 2023). Related to my original search produced related results such as ‘breast cancer support groups in your area’, ‘support programs and services’, or ‘breast cancer patient and advocacy organizations’. Exploring a general overview of these websites shows that they are focused on immediate post-treatment needs and general medical care, not on long-term comprehensive or specifically tailored survivorship. Unfortunately, community-based cancer clinics often have little to no resources for implementing survivorship programs (Fauer, Ganz, & Brauer, 2022). Even when they do, they are usually highly general, decreasing their effectiveness and uptake by survivors. The disconnect between the potentially life-changing research and personal experience of breast cancer survivors occurs not due to access issues to programming but a lack of all-encompassing programing to begin with. Breast cancer survivorship requires the convergence of medical care, public health, education, social work, and community-based participatory research, and a focus on not only the what but the how for each individual. This convergence is what makes LYTE Foundation transdisciplinary and unique.

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Overview of LYTE Foundation

LYTE Foundation’s central mission is to meet the ‘post-treatment’ needs of a growing and diverse breast cancer survivor community (LYTE, n.d.). LYTE’s organizational structure is focused on six (6) areas: a charter network; education and training; marketing; development; research and evaluation; and partnerships. Each area is not meant to be inherently distinct but rather work collectively with each other area to create a transdisciplinary approach to breast cancer survivorship care. LYTE achieves this by establishing community-based and locally tailored charters run by breast cancer advocates who are certified as community health and wellness coaches. LYTE will provide a 16-week no-cost Health and Wellness Coaching credential training to breast cancer advocates and community members. Understanding the uniqueness of individual communities, charters will be established, in tandem with the training of coaches, based on a comprehensive, local needs assessment. After the coaches are credentialed, LYTE will provide the resources and support for them to begin LYTE charters within their communities. Each charter will receive continuous no-cost support from LYTE, such as grant development training, and connection to other charters via a shared network based through LYTE and local partnerships. Each charter will in turn provide no-charge health coaching and resource navigation for breast cancer survivors in their community.

The name of the organization—Living Your Truth Empowered—inspires survivorship support in a mutual process between the organization and the survivor. LYTE’s belief is that for true comprehensive healing to occur, survivorship must be centered around more than physical healing; healing and survivorship must be holistic, individually tailored, and include community validation. Healing and true survivorship must be grounded in the needs communicated by breast cancer survivors.

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9 LYTE accepts donations and applies for grants that focus on programming and research, allowing for these no-cost services.
cancer survivors and driven by supporters, not just related to a medical need, but rather a desire to help vulnerable populations.

**Being Chief Operating Officer**

I am the Chief Operating Officer (COO) of LYTE Foundation [additional researcher reflexivity included in Appendix A]. My role is to oversee LYTE’s day-to-day operations, manage employee productivity, and provide strategic advice to the organization via the Executive Committee and Board of Directors. Further, I am responsible for translating goals set by LYTE’s leadership team into tangible day-to-day tasks that can meet those objectives.

**Positionality as COO.** As a founding member and chief officer of LYTE, I acknowledge that my positionality has an impact or possible influence when interviewing employees and their well-being as well as perceptions of LYTE leadership. For example, I understand how bias can shape my communication with my participants, who are also management and employees of LYTE.

A way to encourage openness is through vulnerability. Celestina (2018) suggests that to develop trust, vulnerability needs to be a part of the conversation. Katz-Buonincontro (2022) further explains that the researcher’s vulnerability and sincerity can help set conditions for good research practice. Edmonson (2018) suggests that a reframing of personal perspectives allows people to feel safe speaking up about problems and mistakes. A practice I constantly utilize in my personal and professional life is cultural humility. The first pillar of cultural humility is lifelong learning and self-reflection (Tervalon & Murray-Garcia, 1998). Throughout the data collection process for this dissertation, I continuously reflected on how my identities shaped my work and constantly challenged my biases. For example, I heard comments about the way LYTE leadership functions and could have easily explained the purpose behind certain decisions, but I
remembered that my goal as the interviewer was to observe and take notes, not interrupt a participant’s flow. Moreover, reflecting on my identities was a bonus when working with participants. For instance, mutual identification of identities helped build rapport. Since LYTE mostly functions through the help of students, that unique set of identities was helpful in the data collection process. As a student myself, I was in the rare position of being able to support my fellow peers not just at CGU but at LYTE. Our shared identities provided opportunities that are distinct to us and allowed us to commiserate, providing vulnerability that helped to build trust, resulting in their contributions to the research herein.
For a really long time I was afraid of looking into and doing that research. I didn't want to face it, but I think having this opportunity to do research and knowing that I can help create programs makes me feel empowered.

-Participant 2, Student

CHAPTER 2: METHODOLOGY

Project Goal

The primary goal of this dissertation was to identify organizational best practices and provide LYTE Foundation’s leadership with tangible recommendations to implement. As such, the main objective of this project was to provide a strategic plan to LYTE Foundation’s Board of Directors on best practices for long-term organizational sustainability. By combining foundational frameworks, I developed the WHOLE (Well-being and Health of Organizations, Leadership, and Employees) Assessment. This chapter explains the process through which this assessment and subsequent intervention came into being.

Foundational Frameworks

McKinsey 7-S Framework

The McKinsey 7-S Framework, developed by Robert Waterman Jr., Tom Peters, and Julien Phillips, explains that organizational effectiveness comes from seven interacting factors that help people effectively work together to implement organization strategies (Spence, 2017). This framework can help develop tools to identify what actions or processes in an organization need to be changed or improved; how each S element aligns with the others helps to identify these processes (Bryan, 2008).

Peters, co-author of the framework, defines the framework as three ‘Hard Ss’ that management has direct control over and four ‘Soft Ss’ which managers influence indirectly (CGMA, 2023). Hard Ss are Strategy, Structure, and Systems while Soft Ss are Skills, Staff, Style—identified collectively as Human Resources—and Superordinate Goals (Jurevicius,
A combination of research by Bryan (2008), Peters (2011), Jurevicius (2022), and CGMA (2023) breaks down each of the Ss:

- **Hard Ss**
  - **Strategy:** Organizations must focus on how to evolve and look to the future. Organizations that can adapt and be dynamic will be more successful. A comprehensive strategy is one focused on competitive advantage by looking at the vision, mission, and values of the organization.
  - **Structure:** This is an organizational hierarchy or chart that identifies who is in charge and how all the players align.
  - **Systems:** The activities, processes, and procedures of the company. An organization should identify, define, and improve how work is done.

- **Soft Ss**
  - **Skills:** The institutional and individual capacities of an organization’s staff. To improve, the organization needs to foster a broad set of skills and include future skills acquisition.
  - **Staff:** The people in the company and their intrinsic talents. It is important to identify diversity when looking at organizational improvement.
  - **Style (a.k.a. Culture):** The way things are done in an organization. Bryan (2008) concedes that this element may be the hardest to diagnose as culture can be strongly enmeshed in parts of the organization, which can then be difficult to remedy.
Superordinate goals (a.k.a. Shared values): These are the foundational values, such as norms and standards, of the organization. Each S surrounding the goals must be relevant and reinforce what the organization is trying to achieve.

As seen in Figure 1, each of the seven individual circles interacts with all the others, creating a shape in which the seven collectively increase overall organizational performance (Peters, 2011).

**Figure 1**

*The McKinsey 7-S Framework (Peters, 2011)*

McKinsey 7-S is commonly used in corporate organizations. For example, as Waterman, Peters, and Phillips were discussing a more effective approach to organizational development, companies such as Hewlett-Packard, 3M, Boeing, Westinghouse, Emerson, Xerox, CitiBank, GE, and IBM wanted their companies assessed for the 7-Ss (Peters & Waterman, 2006). In another setting, McDonalds leveraged the McKinsey 7-S to guide organizational change through
a focus on long- and short-term goals, hierarchal structuring, efficiency in product output, participative leadership, employee diversity, professional development, and community engagement (Malik, 2022).

**PERMA Model**

While McKinsey 7-S focused on the entity of the organization, the PERMA Model is focused on the well-being of the employees therein. Seligman (2011) developed the PERMA Model as a continuation of the Authentic Happiness Theory and Well-Being Theory. PERMA has its roots in positive psychology, and Seligman incorporated this into organizational development—focused specifically on an organization’s employees.

PERMA is a conceptual model and each letter is explained as such:

- **P** = Positive emotions, which includes happiness and life satisfaction;
- **E** = Engagement, which involves being present in the moment and focusing on what is in front of a person;
- **R** = Relationships, which includes feeling loved, valued, supported, etc. by others;
- **M** = Meaning, which involves a sense of belonging and believing in something bigger than oneself; and
- **A** = Achievements, which includes a sense of accomplishment resulting from reaching goals or mastering a skill (Seligman 2011; Madeson, 2017).

A meta-analysis done by Rusk & Waters (2015) showed that this model is known for its use in organizations to assess well-being. For example, Stuart et al. (2012) used PERMA as a

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10 Seligman’s original theory [https://www.authentichappiness.sas.upenn.edu/learn/wellbeing](https://www.authentichappiness.sas.upenn.edu/learn/wellbeing) was Authentic Happiness, wherein he claimed happiness could be summed into three elements: emotion, engagement, and meaning. After realizing that the idea of happiness was one-dimensional, he further developed this into Well-Being Theory, which identified well-being as a construct with those constructs eventually being enveloped into the PERMA model.
model for introducing cultural and organizational leadership change in medical school programs. Kern et al. (2014) identified that PERMA was shown to provide positive associations with physical health, life satisfaction, and professional thriving. Specifically, Engagement and Relationships were strongly related to job satisfaction and organization loyalty. Kun, Balogh, and Krasz (2017) developed a work-based well-being questionnaire using PERMA. Results showed that improved employee well-being contributed to organizational effectiveness through increased productivity and interoffice cooperation.

In an article about positive psychology in real world settings, Green, Evans, and Williams (2017) suggest the future use of the PERMA Model and McKinsey 7-S Framework, along with other theories, as a basis for attempting to improve organizational efficiency and employee satisfaction. Although LYTE Foundation is still new, assessing employee well-being helps in ensuring LYTE brings forth a welcoming work environment. Therein lies a real opportunity of using both frameworks for organizational change. Moreover, once LYTE is more established, these frameworks can still be utilized because reputable data has shown its worthiness in bringing about continued organizational success.

**Frameworks Applied in Public Health**

Both PERMA and McKinsey 7-S have been used in health-related surroundings. Chimielew ska et al. (2022) applied McKinsey 7-S to run a meta-analysis on the organizational performance of hospitals in Warsaw. Results showed that the Hard Ss had a limited impact on operations whereas the Soft Ss, such as social aspects, impacted staff more directly, meaning a focus on employees and a positive management style influenced the hospital workforce. Another article uses 7-S to change opioid prescribing practices. Research from Sokol et al. (2020) about prescribing methods resulted in positive changes surrounding medical practice and the staff,
skills, and organizational structure of the clinic. Kovich et al. (2022) used PERMA to assess the mental health of undergraduate students at Purdue University and found that all sections of the model were helpful in validating student well-being. The results of the study could be therefore used to create tailored programming relevant to their student population. Another article used PERMA to assess the well-being of young adult cancer survivors with results showing that all parts of PERMA plus physical health and perceived stress provided validated support for developing interventions for cancer survivors (Grenawalt et al., 2021).

As the research suggests, McKinsey 7-S and PERMA have both historically been used to identify inefficiencies within organizations or during times of restructuring. These two models can also be used in developing organizations, especially when focused on a comprehensive model of care and not merely from a corporate standpoint. For instance, Abed (2013) writes about using 7-S for a health startup. Abed explains that any startup will start on a smaller scale, and 7-S can be used to provide oversight into creating an efficiently run organization. Green, Evans, and Williams (2017) suggest that a collaborative approach to organizational support will provide sustainability. For a budding nonprofit organization, looking at sustainability from a well-being perspective can create a long-term positive organizational culture.

Organizational Theory Guiding Theoretical Framework

There are a multitude of organizational theories available such as classical organization theory, neoclassical organization theory, modern organization theory, and administrative theory (FAO, n.d.; Harappa, 2021). These theories each take a broader view of management and are

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11 Classical is about viewing the organization as a machine and its employees as an extension of said machine. Neoclassical is identifying that the organization and its employees’ interactions lead to organizational efficiency. Modern is a combination of classical and neoclassical but continues to be researched to fit into a changing world. Administrative is an application-based theory focused on planning, organizing, training, commanding, and coordinating functions.
typically used for established companies. While still useful, I wanted to focus on knowledge that would be applicable to LYTE specifically as a new organization in need of actionable responsibilities to support its development in the early stages. Thus the theories I chose—Organizational Development, McKinsey 7-S, PERMA, and Strategic Planning—could be broken up into its constructs to be immediately translated into practical and tangible application. Through the application of these models, *WHOLE Assessment* emerged.

Organizational Development (OD) Strategy acts as my overarching theory because of its cyclical purpose. Although I am applying it in my dissertation as a template for my dissertation process, each phase is inherently about LYTE and how to apply it to continuously improve its operations. McKinsey 7-S is an organizational model typically used for development, but also for long-term sustainability. Due to 7-S’s multipronged model of connectedness via the constructs, it can be used to continuously help LYTE flourish in an ever-shifting world. Conversely, PERMA is an individual-level model focused on employee well-being which must be a fundamental focus for an organization to be viewed as successful. Employees who are happy, enjoy their work, and feel valued improve organizational effectiveness.

**Organizational Development (OD) Strategy**

Organizational development (OD) is rooted in the idea that change must be expected and planning for that change will help organizations weather the inevitable storm (Smither, Houston, & McIntyre, 2016). Furthermore, successful organizations identify effective problem-solving strategies and as the organization grows, more efficient ways of analyzing these strategies (Quain, 2018). OD is not a singular event but rather an on-going process to ensure organizational sustainability.

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12 When looking at OD Strategy, it appears linear but the lines encircling and connecting to each construct imply to me that they can be used in a repeated format.
To summarize OD, the Association for Talent Development (ATD, 2023) has broken OD strategy into five phases [Figure 2] that I will utilize to identify the best processes for LYTE Foundation.

**Figure 2**

*Organizational Development (OD) Strategy’s 5 phases (ATD, 2023)*

In the explanation of the OD strategy phases, I represent the “consultant” and LYTE Foundation represents the “client”.

- **Phase 1 – Entry**: the initial interaction between the client and the consultant to identify the problem and explore the situation. The plan is to create a scope of work.
- **Phase 2 – Diagnosis**: the data collection phase. During this time, the client’s stakeholders and consultant discuss relevant information to be gathered and analyzed.
- **Phase 3 – Feedback**: bringing back the analyzed information, completed by the consultant, to the client. Together, they explore the information and create an action plan for change solutions.
- Phase 4 – Solution: the design, development, and implementation of the change solutions to improve organizational performance and effectiveness.

- Phase 5 – Evaluation: the continuous process of collecting data to determine if the overall goals and changes the client has implemented is successful.

**Theoretical Framework Applied to Dissertation**

In addition to its use for LYTE Foundation, I have applied OD strategy throughout my dissertation process [Table 1]. During the Qualifying Exam stage, I applied Phase 1—Entry—where I explored the problem, opportunities, and situation. This process has been translated as Chapters 1 (Literature Review). While in the research stage, I utilized Phases 2 and 3, Diagnosis and Feedback, which included data collection and exploration of information, respectively. These Phases are represented in this dissertation in Chapters 2 (Methodology) and 3 (Results). Finally, Phases 4 and 5, Solution and Evaluation, is enacted through my writing of the actual dissertation and creation of a strategic planning process for the Board of Directors, which involves determining best practices and providing recommendations, as shown in Chapter 4 (Discussion and Conclusion).
Table 1

*Flowchart detailing application of OD Strategy to dissertation chapters*

**INPUTS**

**OD Strategy – Entry**

**Dissertation – Chapters 1**

1. Literature review
   a. Breast Cancer survivorship
   b. Equity gap in post-treatment care
2. Gaps in knowledge
   a. Current breast cancer organizations
3. Need for research
   a. No breast cancer survivorship organization dedicated to transdisciplinary care
4. Project Aim
   a. Identify organizational best practices to ensure LYTE Foundation’s continued success
   b. Provide a strategic plan to LYTE’s Board of Directors

**ACTIVITIES**

**OD Strategy – Diagnosis**

**Dissertation – Chapter 2**

1. Research best practices for developing key informant interview questions
   a. Use McKinsey 7-S Framework and PERMA Model as samples
2. Develop interview questions using McKinsey 7-S Framework and PERMA Model
3. Coordinate with key informants for interviews
4. Prepare Zoom for data collection process

**OUTPUTS**

**OD Strategy – Feedback**

**Dissertation – Chapters 2 & 3**

Phase 1:
- Interview Board of Directors and associate directors
- Transcribe interviews using Zoom and Microsoft Word
- Analyze data using Atlas.ti
- Interview industry experts using Zoom and Microsoft Word
- Transcribe interviews and analyze data using Atlas.ti
Phase 2:
- Synthesize all findings using Atlas.ti
Phase 3:
- Develop relevant charts (i.e. leadership, organization, etc.) using Miro
- Compile data for strategic plan

**OUTCOMES**

**OD Strategies – Solution and Evaluation**

**Dissertation – Chapter 4**

To CGU committee members:
- Dissertation

To LYTE Foundation leadership:
- Recommendations for best practices in organizational sustainability
- Strategic plan
Strategic Planning as a Guide for LYTE

Application McKinsey 7-S, PERMA, and OD informs the way that LYTE chooses to operate. The purpose of this project is to provide recommendations for LYTE’s continued success. The simplest way to convey tangible recommendations is to carry out a strategic planning process that results in a tangible and intentional strategic plan—something many organizations utilize.

Strategic Planning Process

Typically, the strategic planning process starts with 1) an assessment of the environment, 2) an analysis of strengths, weaknesses, opportunities, and threats (known as SWOT analysis), 3) meet with staff and stakeholders to determine the best direction for the future, 4) develop goals and objectives, 5) identify metrics and ways to track progress, 6) publish the strategic plan, and 7) plan the implementation (Collins, 2022). It is important to note that a strategic plan may be used to drive an organization forward, but no plan is meant to be used indefinitely. In the example of healthcare, most plans should not be utilized for more than three years (ASCO, 2009). Therefore, the plan should encompass a finite period and each plan should be revised by the leadership team, with the opinion of management and employees.

Strategic Plan. Strategic planning is essential to developing and providing the necessary recommendations. Strategic planning is a process that leverages available information about the organization to guide future direction (Cote, 2023). It is used as the framework for implementing tasks that align with the larger vision. Strategic planning ends with a formalized strategic plan, which leadership and board members use to implement the organization’s vision and goals. Managers and individual contributors are increasingly being asked for their feedback on developing the strategic plan to increase employee engagement (Saalmuller, 2022).
The parts of the strategic plan include (1) an assessment of the current state of the organization; (2) the mission, vision, and values statements; (3) the goals, strategies, and actions that are needed to execute the organization’s vision; and (4) a way to measure success and share information with stakeholders (GIP, 2023). As this is the first time LYTE will be going through a strategic planning process, a final step not listed in the original process dictated by Collins (2022) is that the plan should be reevaluated every two to three years. This predetermined amount of time reminds LYTE Foundation leadership that it must keep assessing the health of the organization to ensure continued success.

**Intersection of Frameworks**

Through the application of Organizational Development Strategy, the McKinsey 7-S Framework, the PERMA Model, and Strategic Planning, I created an Euler diagram\(^\text{13}\) [Figure 3] of how each framework is interwoven, encompassing all four models and tools, which I have named the *WHOLE Assessment*.

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\(^{13}\) An Euler diagram ([https://creately.com/blog/diagrams/venn-diagrams-vs-euler-diagrams/](https://creately.com/blog/diagrams/venn-diagrams-vs-euler-diagrams/)) is a visual representation of parts and their relationships so that a conclusion can be clearly stated and evaluated. This is different from a Venn diagram in that an Euler diagram does not have to show all parts of a relationship in order to be assessed.
The four frameworks are embedded within WHOLE Assessment. Organizational Development was the overarching framework I used to lead my analysis of LYTE Foundation, and my dissertation process. McKinsey 7-S was the framework I used to investigate LYTE Foundation’s organizational structure. This is represented by the research into LYTE Foundation, and questions developed for LYTE leadership. I used PERMA to guide staff feedback. This is represented in the questions developed for LYTE staff and leadership. Finally, strategic planning was a tool to provide context to the theoretical frameworks.
Study Sample

As this project was focused solely on LYTE Foundation and its employees, purposeful sampling was most justified. Purposeful sampling is an intentional outreach to specific individuals whose knowledge and experience best speak to the focus of the study (Cresswell & Plano Clark, 2011). Specifically, this was a homogenous sampling, meaning that every participant shared the same characteristic—a connection to LYTE.

Before reaching out to participants, I submitted my Institutional Review Board (IRB) paperwork [Appendix B], and this project was certified as exempt. Sixteen\(^{14}\) individuals were identified as fitting the recruitment criteria, so I sent recruitment emails to these individuals [Appendix C]. Twelve individuals agreed to participate and were interviewed in November and December of 2023. Participants [Table 2] included doctoral students, LYTE’s board of directors, and industry experts. Specifically highlighting employment status [Figure 4] was important because the participants are all professionals, meaning they have identities separate from their work with LYTE Foundation. Once a participant agreed and scheduled their interview\(^{15}\), the Consent Form [Appendix D] was shared and signed digitally via Adobe Sign. Before each interview began, the participant and I confirmed that the Consent Form was duly signed and returned to me.

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\(^{14}\) Since the start of this dissertation, LYTE Foundation has grown significantly to 46 people, including Board members. The original recruitment included those from the LYTE team who had been with the Foundation from the beginning.

\(^{15}\) Unless otherwise specified, the term ‘interview’ will be used to establish that both interviews and focus groups were conducted.
Table 2

Participant Data

<table>
<thead>
<tr>
<th>Participant (n=12)</th>
<th>Category</th>
<th>Type of Interview</th>
<th>Duration (mm:ss)</th>
<th>Notes (# pages)</th>
<th>Transcript (# pages)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant 1</td>
<td>Student</td>
<td>Individual</td>
<td>30:19</td>
<td>3</td>
<td>18</td>
</tr>
<tr>
<td>Participant 2</td>
<td>Student</td>
<td>Individual</td>
<td>26:54</td>
<td>2.25</td>
<td>14</td>
</tr>
<tr>
<td>Participant 3</td>
<td>Student</td>
<td>Individual</td>
<td>29:53</td>
<td>3</td>
<td>19</td>
</tr>
<tr>
<td>Participant 4</td>
<td>Student</td>
<td>Individual</td>
<td>26:12</td>
<td>3.75</td>
<td>15</td>
</tr>
<tr>
<td>Participant 5</td>
<td>Student</td>
<td>Focus Group</td>
<td>76:59</td>
<td>6</td>
<td>20</td>
</tr>
<tr>
<td>Participant 6</td>
<td>Student</td>
<td>Individual</td>
<td>44:19</td>
<td>5.75</td>
<td>25</td>
</tr>
<tr>
<td>Participant 7</td>
<td>Board of Directors</td>
<td>Individual</td>
<td>58:53</td>
<td>4</td>
<td>26</td>
</tr>
<tr>
<td>Participant 8</td>
<td>Board of Directors</td>
<td>Individual</td>
<td>25:28</td>
<td>2.5</td>
<td>14</td>
</tr>
<tr>
<td>Participant 9</td>
<td>Board of Directors</td>
<td>Individual</td>
<td>39:11</td>
<td>3.5</td>
<td>21</td>
</tr>
<tr>
<td>Participant 10</td>
<td>Board of Directors</td>
<td>Individual</td>
<td>20:58</td>
<td>1.25</td>
<td>17</td>
</tr>
<tr>
<td>Participant 11</td>
<td>Industry Expert</td>
<td>Individual</td>
<td>21:32</td>
<td>1.25</td>
<td>19</td>
</tr>
<tr>
<td>Participant 12</td>
<td>Industry Expert</td>
<td>Individual</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Incorporation of Industry Experts

The original goal of my dissertation was to focus interviews only on LYTE Foundation staff. However, through my network connections, I was able to additionally interview two industry experts (identified as Participants 11 and 12). These two experts have experience in helping new organizations identify critical needs from both leadership and employee perspectives as well as supporting established organizations restructure to align with their future goals. These experts’ viewpoints have enriched my data and further supported my results.

Overall Study Design

Qualitative design was the best approach to this study. Neither quantitative nor mixed methods approach would work for this research project because quantitative research is hypothesis driven and experimental whereas qualitative research focuses on people in practical settings. Goertz & Mahoney (2013) differentiates quantitative from qualitative by explaining that

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16 Categories not included due to no responses are ‘Retired’, ‘Unemployed’, and ‘Part-time school’.
quantitative research focuses on cross-case analysis of populations whereas qualitative research is mainly used to make inferences about individual cases. Furthermore, Katz-Buonincontro (2022) uses inductive logic to justify qualitative research in that it allows themes and codes to occur in conversation rather than using a hypothesis to find causation. Inductive theorizing is about seeking generalizations about specific experiences. Shepherd & Sutcliffe (2011) researched that this theorizing is important when investigating organizational opportunities because one cannot know what one does not know yet. Therefore, inductive theorizing is a core part of organizational development inquiry at the stage where any information would be considered useful as it is new knowledge. Moreover, interviewing is about subjective understanding. Seidman (2019) argues that if the goal is to understand the meaning behind people’s involvement in an institution through their experiences, then interviewing is not only necessary but a sufficient mode of investigation. Qualitative research allows for an openness to data without making assumptions.

**McKinsey 7-S and PERMA Combined**

Peters and Waterman (2006) used the 7-S Framework as a structure for not just a series of interviews, but also to structure how to communicate the conclusions from those interviews to stakeholders. Likewise, Slater & Edwards (2018) used PERMA to guide its interviews of oncology staff and identify how to support their well-being. Using the McKinsey 7-S Framework, interview questions that target each element when interviewing the leadership team, including the Board of Directors. The goal was to look at the organization and its sustainability functions including future possibilities for organizational growth. As an organization is made up of its parts, mainly the employees, questions also focused on the Soft Ss and PERMA. The goal here was to identify best practices for the workforce through the nonprofit lens.
Data Collection Tool

My main data collection tool was the set of interview questions I developed. I created the Interview Guides (Appendix E) using CGU’s consent form as a basis for the protocol language. The interview questions were generated by using key words from McKinsey 7-S and PERMA. For example, a question about LYTE’s processes came from the McKinsey Hard S ‘Structure’, and a question about acknowledging success came from ‘Achievements’ in PERMA. After creating all the questions, I separated them into two groups—one for leadership and one for employees. This was necessary as an employee would not be able to answer a question about the ‘Structure’ of LYTE, but they would be able to answer questions about ‘Relationships’ and ‘Positive Emotions’ related to working with LYTE. Similarly, leadership would not be in the best position to answer questions about LYTE’s ‘Style’ (aka. company culture), but they should have advice for LYTE’s ‘Superordinate Goals’ and ‘Strategy’.

I based the interview questions for the two industry experts on the questions I used for leadership. The only part I altered was any language related to LYTE, adapting the questions to be more focused on any new organization. This allowed them to answer but through a more generalizable lens.

Data Collection Procedure

I used the Interview Guide to ensure that the process was standardized. There are two versions because the questions were tailored to the two populations I was interviewing—students and board members. Regardless of population, I reminded each participant about the purpose of the study, and what was stated on their consent form regarding confidentiality and who to reach out to in case of any concerns. I conducted 10 semi-structured interviews and one focus group. Although my initial goal was to have focus groups for all LYTE employees and only complete
interviews with LYTE leadership, this unfortunately was not possible as it was difficult to schedule a common date and time for six participants, all of whom are students and have different responsibilities outside of LYTE. Regardless, after the interviews were completed, participants were asked to fill out a demographic survey [Appendix F].

I conducted the interviews and focus group via Zoom. All interviews were conducted in a location convenient to the participant, such as their home or office. Each interview was limited to one hour maximum and focus group to two hours maximum.

**Trust in Interviewing**

To generate true and honest feedback, trust between researcher and participant is vital. Building trust takes time and considerable effort, and psychological safety is an important part of trust. Edmonson (2018) provides an excellent toolkit [Figure 5] for building psychological safety in the workplace, which I applied to the interview process.

**Figure 5**

*Toolkit for Building Employee Psychological Safety (Edmonson, 2018)*

For example, in setting the stage, I ensured that I set clear expectations and emphasize the purpose of the research. This is done by thoroughly going over the consent form before starting
the recording. Next, I invited participation by showing my own humility about organizational leadership, asking impactful questions, and providing a space for honest input, which showed that honesty was respected and wanted. Finally, response to interview questions required my ability to listen, acknowledge, and thank the participants, discuss future implications of their participation on the research, and show my own continuous learning in the process.

**Data Analysis**

Interview questions were categorized using the McKinsey 7-S Framework of the Hard Ss—Strategy, Structure, and Systems—and Soft Ss—Skills, Staff, and Style—plus PERMA (Positive Emotions, Engagement, Relationships, Meaning, and Achievements) [Appendix G]. The average interview duration was 36 minutes and 10 seconds. I collected over 36 pages of typed notes and saved 208 pages of transcripts. Interviews were recorded on Zoom and transcripts were automatically generated using Zoom software, except for two interviews and the focus group transcripts being generated using Microsoft Word.

I uploaded all video recordings and transcripts to Atlas.ti and used thematic analysis to find themes within the interviews by analyzing the meaning behind set texts, such as phrases and sentences.

The creation of the *WHOLE Assessment*, as an intersection of three frameworks, in addition to strategic planning as a parallel tool, is unique to LYTE Foundation because LYTE is a non-hierarchal and anti-authoritarian minded nonprofit focused on community-based breast cancer advocacy. In relation, the *WHOLE Assessment* centers on the health and well-being of an organization, its leadership, and its employees by utilizing four different frameworks and tools.
“I have a lot to learn and I really wanna become an effective leader. That gives me meaning. It gives me a reason to learn. Gives me a reason to keep working and be excited and to move things forward.”

-Participant 7, Board of Directors

CHAPTER 3: RESULTS

Breakdown of *WHOLE* Assessment

Organizational Development (OD) Strategy is a process used by organizations to achieve long-term success. I used OD Strategy as the overarching framework and embedded pieces of McKinsey 7-S and PERMA within each OD phase to show how it was applied throughout the research process. In parallel to McKinsey and PERMA, strategic planning was concurrently occurring as a concrete application of the frameworks.

McKinsey 7-S and PERMA were used during the Entry Phase as part of the data collection process (e.g. creation of questions for interviews) and the strategic planning task was a SWOT analysis. The Diagnosis Phase involved McKinsey and PERMA by asking those developed questions in the strategic planning task of meeting stakeholders. During the Feedback Phase, the questions were analyzed and used in the strategic planning task of developing goals and objectives related to the results of the questions. In the Solution phase, the results from PERMA-related questions and McKinsey 7-S were combined to develop organizational standards and the strategic planning task was to bring all the information together to start a strategic plan. Finally, Evaluation Phase is about implementing and assessing the strategic plan every few years to ensure the organization is, or continues to be, viable.

**OD Strategy Solution Phase related to LYTE.** As components parts of the *WHOLE* Assessment, I intertwined each part of LYTE’s organizational standards with the results from PERMA and McKinsey 7-S questions, leading to a LYTE-specific McKinsey 7-S Hard and Soft
Furthermore, I stratified results to focus on two areas—leadership traits and actionable items [Figure 6].

**Figure 6**

*Mckinsey 7-S + PERMA as applied to LYTE Foundation*

Leadership traits are qualities that management should embody when thinking about the sustainability of LYTE. Actionable items are arrangements that are enforceable and support staff well-being and employment longevity. Thus, the themes I was able to identify helped shape an M7-S Framework specific to what LYTE needs to become a successful non-profit.
Overarching Themes

The *WHOLE Assessment* resulted in the emergence of themes that do not necessarily equate to a particular McKinsey S but are important to recognize. Two predominant themes that were repetitious in participant responses were their thoughts about LYTE CEO and founder Dr. Clague DeHart and their thoughts about LYTE Foundation as a still developing organization.

**CEO/Founder, Dr. Jessica Clague DeHart**

Dr. Jessica Clague DeHart and her connection to every individual working with LYTE was evident in participant responses. For instance, Dr. Clague DeHart’s conversations moved them to join LYTE. Participant 9 (Board of Directors) expressed that knowing Clague DeHart’s “experience and expertise” correlated with how LYTE “was going to be a fantastic organization”. Furthermore, Participant 10, also a board member, explained that they had followed Clague DeHart’s work over the years and admired her work with breast cancer survivors.

“I have been connected to the work she's done over the years, and I have always really believed in her work and the value of her approach to survivorship. And so pretty much I’ll follow her anywhere at this point.” -Participant 10, Board of Directors

Dr. Clague DeHart is so admired by her students that they seek out opportunities to ensure they get to continue working with her. Individuals such as Participant 3 (Student), fervently say that “DeHart is a great leader”. Other students, such as Participants 1 and 5, admire Clague DeHart for her leadership style and expertise.

“[Jessica is] the CEO. She’s the leader, but she feels like a friend, and it's great when you can have that personal connection with someone that you know you admire, you look up to and you wanna learn from.” -Participant 1, Student

“I had really liked her style of teaching and I really liked her style of management kind of going into it, so I always knew that I wanted some way to incorporate Professor DeHart in my committee for my dissertation…like, I'm gonna do the doctoral program. I'm going to stay at CGU because I want this person on my committee, preferably to be my chair.” -Participant 5, Student
It was a sentiment shared among board members and students alike that Dr. Clague DeHart is the heart of LYTE Foundation. Each participant expressed that they believe in her and what she wants LYTE to achieve.

**Early Days**

Participants acknowledged that LYTE is still in its infancy. For example, Participant 10 (Board of Directors) explained that “it's still really early. Things are kind of getting settled in now with bringing in some different people.” As LYTE continues to develop, it must be open to change as more concerns will inevitably arise.

> “As things grow and things change, and as we put the planning into execution, I may be posed with some challenges. I don't know. So, for now I'm OK, but I am aware that it could potentially change. I may potentially need more support.” - Participant 6, Student

These participants have been with LYTE since its inception, many when LYTE was still just an idea. They understand the waves that a new organization must go through and respect the need to constantly assess where LYTE should focus its attention.

**WHOLE Assessment – The Organization**

McKinsey 7-S was fundamental to WHOLE Assessment in order to examine LYTE organizationally to pinpoint where it is currently successful and where improvement could be beneficial. As such, I looked at each of the 7s and connected it to all facets of LYTE Foundation. Looking at LYTE from a larger perspective focuses on the O of WHOLE Assessment – the Organization.

**Structure, Staff, and Skills**

LYTE’s Structure, Staff, and Skills are easily defined. Addressing Structure, I had to create an organizational chart [Figure 7] detailing how each area is broken down and who
oversees which area. This allowed me to view everything at a macro scale to understand all the parts and people involved.

**Figure 7**

*LYTE Foundation Organizational Chart*

The Staff of LYTE Foundation consists of eight individuals on the Board of Directors (three of whom are part of the C-Suite team/Executive Committee), two breast cancer advocates, three health and wellness coaches, 14 unpaid employees (identified as Doctor of Public Health and PhD candidates and students), and 19 interns (identified as Master’s-level and Doctor of Osteopathy students). The C-Suite includes Dr. Jessica Clague DeHart, Chief Executive Officer (CEO); me as the Chief Operating Officer (COO); and Eric DeHart, the Chief Financial Officer (CFO). The CEO oversees all aspects of LYTE, specifically students, staff, research, and
applications. The COO is responsible for administrative duties, manages programming, and supports the CEO. The CFO tracks the cashflow that LYTE receives from grants and donations and supports in filing governmental paperwork. Doctoral students lead different areas of LYTE (such as the Health and Wellness Coaching Program, charter development, needs assessments, research projects, and storytelling).

The Skills comes from the fact that most doctoral students oversee a group of interns and volunteers, allowing them to practice and hone their leadership skills. Finally, Master’s-level interns implement the programs developed, practicing skills that show sensitivity to the breast cancer population.

**Strategy, Systems, and Style**

As defined in the bylaws, LYTE operates with horizontal principles: “LYTE is committed to democratic communication on a level plane and strives to make decisions and take actions in as anti-hierarchical and anti-authoritarian a way as is possible under relevant law” (LYTE Foundation, 2023). To summarize, LYTE Foundation operates as an anti-hierarchal and anti-authoritarian minded organization focused on community advocacy dedicated to breast cancer survivorship.

LYTE, with the support of Dr. Brett S. Goldberg, used his two non-profits’ bylaws17 as a starting point when developing its own. These bylaws were the basis for my analysis of Strategy, Systems, and Style. Overall, the bylaws are a manifestation of LYTE’s Style, helping inform its culture. An example of Strategy is the fact that an entire section of the bylaws, specifically Article XII titled ‘Harassment and Discrimination’, was incorporated. This shows a focus on LYTE’s values. Further, the bylaws specifically lay out definitions of terms such as

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‘Discrimination’, ‘Harassment’, and ‘Retaliation’ and provide reporting and confidentiality rules, thereby reinforcing Systems.

**Superordinate Goals (Shared Values)**

These concepts are a fundamental part of LYTE’s makeup. The shared values identified are what link each person to LYTE and include empowering oneself, advocating for patients, and supporting them through all parts of survivorship care.

**Empowerment.** To empower is to promote the self-actualization of something (Merriam-Webster, n.d.-b). Almost all interviewees joined LYTE Foundation because they were impacted by (breast) cancer. People who work for LYTE were drawn by the personal connection because they realized that they were not the only ones impacted by cancer. Participant 2 (Student) mentioned that their family member “passed away from breast cancer, and [they] didn’t have a support system and I think [LYTE Foundation] would have been helpful”. Further, when Participant 4 (Student) realized that LYTE Foundation was about breast cancer, and they had it in their family, they “just fell in love with it”. This realization about how important breast cancer is led them to join LYTE.

At the time of writing, LYTE as a foundation is barely one year old and not currently in a place to financially support employees. Therefore, any person who agrees to join LYTE does so understanding that they will not receive financial compensation for their work. This reality reinforces the assertion that the people who join LYTE have a passion for breast cancer survivorship and advocacy.

**Advocacy.** Breast cancer advocacy is a general term described as the viewpoint of a patient or a viewpoint that is patient centered (Tripathy, 1998). Another general theme that surfaced was the need for uplifting and centering of patient voices.
Historically, breast cancer has been a political issue (Lerner, 2003). Breast cancer awareness has moved the needle further into the activism sphere and there is a growing body wanting public opinion to be part of that step (Osuch et al., 2012). Organizations such as Susan G. Komen and Breast Cancer Research Foundation18 focus on ending breast cancer, so survivorship becomes ignored, as Participant 5 clarified.

“The survivorship community kind of just gets blown out because [people] don't care about that. [People] care about all the people that are diagnosed. You hear about all the people that are going through it, of the problems that are happening when they go through it.” -Participant 5, Student

To counteract the argument that ending breast cancer is the final solution, LYTE Foundation created programming influenced specifically by survivor voices. This allows patients to advocate for themselves instead of research deciding what is generically best. Carter (2020) from the MD Anderson Center explains that survivorship should be just as highlighted because survivorship means something different to individuals going through breast cancer. No one prescribed plan will work for all survivors as survivorship can be very personal (Carter, 2020). Therefore, LYTE centers the patient’s voice to help them decide how to stay healthy and cancer-free, as explained by Participant 9.

“[LYTE] is driven by incorporating what the patient's needs are. So, it's really incorporating that voice of the patient doing things that are based on an actual need. That is, voiced by patients versus what we think they need and [not] just saying this is how we need to support them but hearing from the patients themselves.” -Participant 9, Board of Directors

These quotes detail the need for more patient-centered voices, rather than a researcher-only perspective. Breast cancer survivorship support must utilize medical advice and be informed by the specific needs of survivors.

**Continuum of Care.** The National Cancer Institute (n.d.) defines continuum of care as the delivery of care over a period of time, typically covering phases of illness until the end of life. LYTE’s mission is to “meet the needs of a growing and diverse breast cancer survivor community by providing community-based and locally tailored charters run by breast cancer advocates who are certified as community health coaches and wellness navigators” (LYTE Foundation, n.d.). Breast cancer survivorship is about supporting a patient through the phases of their care after treatment or throughout the rest of their lives. This mission ensures that LYTE cares for its clients in the most holistic way possible.

An organization’s mission is the core of how it should be run. That mission should be inherent in every individual’s occupational purpose. Participant 11 (Industry Expert) underscores the importance of being “more purposeful mission-driven where people can understand clearly what the organization is trying to drive towards. [Employees] live their value [based on that].” Participant 12 (Industry Expert) shares this opinion in that people will use the company mission to decide if they want to work with a specific company.

“[People are excited to work for an organization based on] the mission. What is the actual overall thing or mission that the organization is trying to do? In the case of a nonprofit, it mostly is never the money. It's always the mission in regards to the results that will either better the community or better individuals and make a difference in the world.” -Participant 12, Industry Expert

Participant 7 (Board of Directors) emphasized that “LYTE is not driven by the wants and needs of the researchers…of the executive team, but the wants and the needs of breast cancer survivors.” Hence, LYTE’s work focuses on community by connecting advocates with survivors. LYTE’s goal is to ensure that breast cancer survivors are allowed to be a partner in their own well-being.
WHOLE Assessment – Leadership

The following set of themes identified are traits that leadership needs to acknowledge and adopt to have a cohesive organizational culture. This set of themes focuses on leadership traits, which is represented by the L in WHOLE Assessment – Leadership. The themes uncovered were inclusivity, vulnerability, open communication, transparency, and boundaries.

Inclusivity

Being inclusive means incorporating everyone, especially those who may have been historically excluded due to their identities (Meriam-Webster, n.d.-e). In this context, the marginalized group is the employee, as usually input on organizational growth is derived from leadership. The top-down approach to management where leadership makes all the decisions with no involvement of their workers is no longer effective though. An inclusive workspace involves employees who feel respected and valued for their ideas and the experiences they bring to the company (Wormington, 2023). Participant 12 (Industry Expert) recalled times during their experiences helping build or restructure organizations “when a leader just tells people to do things and actually does not listen to feedback.” Participant 12 explained further that these types of leaders “tend not to perform well, and team morale seems to suffer”.

DEI Advocacy. An example of the need for inclusivity is in Diversity, Equity, and Inclusion (DEI). DEI is a practice meant to ensure that typically underrepresented groups feel welcome and supported in the workplace (Urwin, 2023). Unfortunately, there has been progressively more work in recent years to dismantle DEI practices. For example, 65 bills, 8 of which became law, were introduced to limit DEI work in higher education (Watson, 2024). The Supreme Court’s decision to strip LGBTQIA+ rights and end Affirmative Action are further
examples of anti-DEI sentiment (Gassam Asare, 2023). Participant 8 emphasized the need to counteract this negative sentiment.

“Invest in this training that is so desperately needed. What are recommendations for leadership? Believe there's an issue. Believe [lack of] DEI is a problem.” - Participant 8, Board of Directors

The way to counteract the anti-DEI sentiment is not to narrowly define unfair advantages that DEI promotes, but rather to have larger conversations about the meaning of DEI values. For example, Emmerson (2024) argues that DEI practices should be about clarifying gaps in DEI work, putting those actions into practice, and educating newer generations of workers about how to overcome these obstacles.

**Listening.** A core tenet of being inclusive is listening to others. It is important to center not just patient voices, as highlighted earlier, but employee voices as well. The ability to provide support without judgment is critical to investing in employee well-being. Participant 4 explains that being inclusive of everyone’s opinions allows employees to feel supported.

“If [someone is] going through something or needing additional support, create an environment that is very inclusive and open and nonjudgmental. It’s really important to continue to be inclusive and open, so that people are continuously feeling like they can reach out to you and let you know when they need additional support. -Participant 4, Student

Overall, the goal of an inclusive workplace is to provide an environment where employees feel they can bring their authentic selves to the professional space. Participants shared how they wanted to be part of a team that incorporated their opinions on organizational decisions. They didn’t necessarily wish to be included in all decisions because they understood some had to be made by the executive committee, but in those instances, they wanted to still be included in the conversation if only to hear about how LYTE is operating.
Transparency

Like inclusivity, transparency was a theme that was repeated throughout the interviews. Merriam-Webster (n.d.-g) provides a few definitions of transparent such as being “free from pretense or deceit” and “characterized by visibility or accessibility of information especially concerning business practices”. I highlight the second definition because Participant 12 (Industry Expert) shared the importance of communication on both directions, “from a manager perspective and also from an employee perspective.” They explained that when transparency exists, “there's no stupid questions and…everybody is willing to talk and listen to you.”

As no one is being paid to work for LYTE, asking for transparency in the things that are occurring allows the team to feel they are part of the larger picture. Participant 3 (Student) explained that leadership being honest is important because “when things come up, you don't want to scare your team”. Furthermore, Participant 6 (Student) wanted to be notified of key moments in the organization “like some of the milestones that have been hit as things trek along” because as an employee of LYTE, they likely played an important role in hitting that marker.

It is important to note that there is a difference in levels of transparency. Cooks-Campbell (2022) clarified that extreme transparency could be met with backlash, if not handled properly. Information flow should be consistent so that those involved are not left confused or frightened by information overload. It is leadership’s responsibility to ensure that transparency is rooted in open communication, but also tailored to what specific teams need to know at key moments.

Open Communication

Communication can help in providing a welcoming working environment. Workplace communication includes discussing individual tasks, project updates, and giving feedback
(Martins, 2022). Participant 12 describes a leader who takes responsibility for the communication of their team.

“[Be] the voice for their team when it comes to decisions… The best leaders I've ever had have been folks that are clear in their communication… an effective leader tries to make sure that they communicate clearly, but also that it's an effective communication that does not leave the team or the organization in an unknown state of what is the actual direction of the that meeting, or from that strategy that was discussed.” -Participant 12, Industry Expert

Open communication though is only as good as how both the manager and employee put it into action. For example, Martins (2022) explained that good communication requires clarity of message; solves problems, not create them; and is a two-way exchange of information, from the manager to employee and vice versa.

A dramatic shift in the Board of Directors occurred during the summer of 2023 when a member of the C-Suite team decided to resign from their position. Participant 4 worked directly with that team leader and recalled their experience of the situation.

“I was underneath someone else who had a bigger role, and they were truly in charge. I didn't really realize that the other person who was in charge was not really stepping up or doing what they were supposed to be doing. So I just wish that I would have taken initiative and reached out… beforehand and been like, ‘Hey, this is what's going on’ instead of just being like, ‘Oh, well, [they’re] the leader’ [and left it to them].” -Participant 4, Student

This change forced the team to assess the way it had been operating and communicating with the rest of LYTE employees. Participant 12 explained that communication breakdown is something they have seen in other teams, leading to negative consequences.

“I think effective leaders are only as good as the team that they run. Also, from the perspective of if an idea comes from their team and they don't respect that decision, or who hardly believes in [that] decision and they waiver [on deciding], then what you get as a team that does not want to volunteer information. It becomes a negative feedback loop.” -Participant 12, Industry Expert
The situation regarding the C-Suite member and employee could have been managed had both the lead and staff member communicated their needs more clearly. As Martins (2022) pointed out, Participant 7 also understood that communication must flow both ways to be truly effective.

“If there is an issue or something, if you can't solve it, then [talk to leadership] …but at the same time we were all learning together. We've all kind of like gotten comfortable and [know] how to work with each other.” -Participant 7, Board of Directors

For the team leader, it would have been helpful to the team had they been more decisive on plans and holding consistent meetings. For the employee, it would have been appropriate for them to ask for help from other Executive Committee leaders who could have stepped in sooner.

**Vulnerability**

Traditionally, being vulnerable in any capacity was deemed to be terrifying or embarrassing (Boublil, 2018). This fear stems from the fact that being vulnerable requires us to be open and accept emotional risk (Fritscher, 2023). Perceptions of leaders often include synonyms such as “taskmaster”, “head”, “boss man”, and the like (Merriam-Webster, n.d.-f). These terms don't necessarily evoke openness when there is a power imbalance between manager and employee (Boublil, 2018). Participant 1 clarified that being a leader does not automatically make a person superior to others.

“Just because you are a leader, doesn’t mean it makes you better. Being a leader is to serve. So, I think not only are you serving the community, your constituents, but you're also serving your employees. You're also serving your team as a leader.” -Participant 1, Student

Checking one’s ego at the door helps build relationships with team members. Omadeke (2022) highlights a hopeful trend that vulnerability is becoming welcomed in the work, specifically for Millennials and Gen Z workers, who are more willing to share their emotional and mental needs. LYTE employees want the vulnerability from leadership so that they feel leadership can be trusted.
Respecting Boundaries

The reality is that LYTE Foundation work is secondary to almost, if not all staff and interns that join the organization as everyone has other aspects of their lives that require their time and energy, as well as pays their bills [refer to Figure 4, Chapter 2].

“[A] challenge is we're so new, and [LYTE is] not paying people. When do [we] ask people to do things? [We] don't wanna give them more work to do, but that's the team, and if you join the team you're joining the team to do the work.” - Participant 7, Board of Directors

As such, boundaries are important so that leadership understands and has respect for their employees’ multiple identities and circumstances.

Additionally, breast cancer survivorship can be emotionally draining at times. It is important to address ways to prevent staff stress by allowing staff to take time off as they see fit without feeling guilty for leaving work behind. Participant 10 (Board of Directors) believed that “nonprofits give a lot of vacation time” and they recommended employees “take every last one of those days, because that’s how to prevent the burnout.” To Participant 10’s assertion, California recently implemented a law that guarantees workers five paid sick days, increased from three (SB 616, 2023). California is acknowledging the need to provide time off to employees to care for themselves (or loved ones).

**WHOLE Assessment – Employees**

The next set of themes are identified tasks that LYTE should implement to increase chances for its continued success as an organization. These themes emphasize improving the employee experience at LYTE, thus focusing on the *E* of *WHOLE Assessment* – the *Employee*. The themes included are creating a strong foundation, providing hands-on experiences, being collaborative and flexible, and appreciating employees.
Clarifying Roles and Responsibilities

LYTE spent its first year making plans to launch its health and wellness coaching program, focusing significant energy and funds on providing a no-cost pilot to a select group of individuals. After a year and a half of planning, the assistance of multiple doctoral and master’s-level students, and continuous feedback from coaches and advocates, LYTE was ready to finally induct its first coaching cohort in January of 2024. Since the team’s singular focus was on the LYTE coaching program, many other responsibilities were placed on the backburner, specifically identifying organizational roles and responsibilities. Participant 12, an experienced industry expert, explained that this is a common occurrence with startups and smaller organizations.

“Smaller companies need more direction…individuals in those smaller companies do a lot more things. They're not just specifically one role or one responsibility. They have a lot of overlapping roles and responsibilities. And you need clear leadership.” -Participant 12, Industry Expert

Each member of the C-Suite team/Executive Committee is also part of the Board of Directors. LYTE developed its bylaws to distinctly define each role, but Participant 11 suggests separating the two identities to share the workload more easily.

“Mak[e] sure that there is a distinction between the Board of Directors [and] the board of management. Too often, organizations commingle, and it causes havoc. They're relying on board members to do things which they very rarely have time for and equally doesn't empower the management to feel like they can do what they need to do.” -Participant 11, Industry Expert

As LYTE grows and more people join or can dedicate time to it, it is important to start separating roles for higher leadership.
**Applicable Experiences**

As LYTE Foundation is almost purely staffed by graduate students\(^{19}\), it is expected that interns\(^{20}\) will find it a place to provide applicable experiences that can translate into the real world. Participant 11 rationalizes that helping staff grow is beneficial not just to the employee but to the company as well.

> “The people who you work with, you’re investing deeply in them. You train them. The role you're curating, their experiences and trying to think about what they can do to continue to grow and so forth. And ultimately that will yield a much better result for both parties involved.” -Participant 11, Industry Expert

It cannot be expected that an intern would know everything they need solely from coursework. Rather, interns should be applying what they learned from the classroom into the field. LYTE, as an internship site, must invest in training for new interns to help them in their professional development.

> “A lot of opportunity for various trainings. And so just making sure people are aware that there's opportunities out there. And I think as you're bringing in new projects, or you're talking about new things, then that provides a lot of opportunity.” -Participant 9, Board of Directors

Developing an effective internship program requires more than just offering practical training though. Participant 10 explains that assessing competencies must be an integral part of the student experience.

> We’ve talked about being more rigorous with [some] competencies. We have developed all of these different structured competencies within different domains of skills. And in order to be signed off, it takes a certain amount of things [one needs to complete].” -Participant 10, Board of Directors

Tinoco-Giraldo et al. (2021) connects academic internships with competencies to foster capable employees. Assessment of those competencies is the outcome to show a student’s growth and

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\(^{19}\) LYTE currently works with Claremont Graduate University and Keck Graduate Institute.

\(^{20}\) Terms such as ‘interns’ and ‘internship’ are not necessarily just for those working with LYTE for course credit. It also means any person that is a student while at LYTE.
experience. LYTE would do well to foster competent professionals by providing worthy experiences that have competency standards with which students can be measured by.

**Flexibility and Collaboration**

**Flexibility.** Being flexible is about adapting to new, different, or changing requirements (Merriam-Webster, n.d.-c). The idea of flexibility and collaboration are combined because for LYTE, one cannot exist without the other. About 85% of LYTE Foundation is staffed by students and 100% of LYTE staff members and executives have other jobs, some of whom are juggling multiple tasks [refer to Figure 4, Chapter 2]. Due to these numerous identities, it is not always easy to bring everyone together, as Participant 3 describes.

“[It’s] difficult [to get more people to the weekly team meetings] just with the nature of how things are right now…because people have to hold all their jobs and they’re students, etc. It’s not their singular focus sadly.” -Participant 3, Student

At some points of the year (i.e. midterms, finals), interns will likely need more support as their school obligations demand more of their time and energy. This support translates to flexibility because professional staff understand that, although LYTE is an organization, life happens and it’s important to have compassion for unexpected situations.

**Collaboration.** No organization can be effective if everyone only works for themselves, an action named organizational siloing. Haughey (2024) explains that organizational silos are when members of different departments don’t share information outside of their own team. These types of siloing could vary from team silos to rank silos to location silos. Participant 11 acknowledged that previous iterations of management required a silo mentality.

“[I’ve spent a lot of my career breaking down organizational silos, which in times gone past were much more useful for the dissemination of information, because it was difficult to manage confidentiality.”] -Participant 11, Industry Expert
Today’s employees though want a collaborative environment, especially after years of working virtually due to COVID. Collaboration is to cooperate with or willingly work with others (Merriam-Webster, n.d.-a). UC Today (2023) explains that when employees work collaboratively, productivity is enhanced, and problems get solved much quicker than if tasks were delegated individually. Participant 12 further encourages managers to collaborate with their teams, so that continuous interaction exists, removing the team or rank silos.

“People can feel that you can actually talk to people, either their peers or their manager, but it also works both ways…Overemphasize collaboration. Overemphasize listening.” -Participant 12, Industry Expert

Since LYTE was exclusively developed in the virtual realm, many have not physically met each other. Participant 2 suggests meeting together in a physical space to get to know one another more deeply, breaking up the location silo.

“Weekly meetings help, and meeting individually helps as well. I was thinking that also, just in general, the group also needs to be more connected as well. Maybe like every month, we just meet and not discuss work and get to know each other cause a lot of us are at school, and all we think about is school!” -Participant 2, Student

There is a desire for staff and students alike to interact tangibly in a way that was available before COVID. It’s not to say that the team must always meet in-person, but rather meet physically at key times that would engender collaboration moving forward.

**Authentic Appreciation**

It is natural to want to be appreciated for the work that one puts in, and appreciation is necessary to foster a good working environment. Participant 10 (Board of Directors) mentioned that appreciation starts with leadership, who “really needs to make more of an effort to recognize the talent they have.” Acknowledgment from company leaders can, and should, eventually evolve into appreciation.
Love languages is a concept that breaks down appreciation into five categories: (1) words of affirmation, (2) acts of service, (3) receiving gifts, (4) quality time, and (5) physical touch (Borst & Courtney, 2023). Coincidentally, without being prompted, many participants discussed the workplace by utilizing the framing of one, if not more, of these love languages especially receiving gifts and words of affirmation. I would also argue that the earlier theme of ‘collaboration’ is akin to quality time, ‘flexibility’ is an act of service, and the want to meet in-person is related to ‘physical touch’.

**Receiving Gifts.** Although LYTE Foundation is new, it has the potential and capability to uplift its employees financially. Participant 12 explains the importance of money to show appreciation for employees’ work.

“[Acknowledge success through] money. Money as in like salary or money as in showing them how much they’ve helped contribute to the company. It’s more of like a salary designation.” -Participant 12, Industry Expert

Although Merriam-Webster (n.d.-d) defines “gift” as *voluntarily* giving something to someone else without compensation, appreciation and compensation are mutually beneficial in that being compensated adequately translates to leadership showing appreciation to their staff for a job well done, increasing satisfaction in the workplace. The adequacy of that compensation is what makes receiving gifts a part of authentic appreciation in the workplace. Paid work is important, but adequate pay, or even better in providing increases in pay through bonuses and raises, reflects a respect leadership has for that employee.

**Words of Affirmation.** Another common thread of love languages in my interviews was acknowledgement through compliments and words of encouragement. For example, Participant 4 (Student) clarified that they specifically were “a very big words of affirmation person”.

Participant 12 reinforced the idea by explaining that leadership providing those words is different than an employee expressing themselves.
“Actual acknowledgement of that person’s activities to other senior leaders, because in a sense it comes down to promoting the individual without them doing the self-promotion because people don't like to self-promote themselves without looking like they’re brown nosers, especially to other leaders.” -Participant 12, Industry Expert

Participant 11 notes though that words of affirmation should be genuine and applicable or else they could be viewed as insincere.

“Acknowledgement should be reserved for achievements. Actually showcase meaning to the achievement…otherwise, if everyone told you all the time you did a great job, it wouldn’t work at all.” -Participant 11, Industry Expert

These quotes lead back to vulnerability and trust in that genuine appreciation is necessary to nurture a strong company culture.

Authentic appreciation is a step beyond recognition for work completed. Blueboard (2023) compares recognition with authentic appreciation using Maslow’s Hierarchy of Needs21. Recognition, such as acknowledgement of success, would fulfill the lower Safety and Security Needs level, which provides the example of job stability because acknowledging an employee’s good deeds likely means that employee will not be terminated any time soon. Authentic appreciation would fulfill the next level of Needs with Love and Belonging plus Self-esteem, which is related to feeling part of a group, leading to a desire to be accepted and valued by others (Mcleod, 2024). Essentially, authentic appreciation rather than simple recognition is an effective approach to ensuring employee well-being because employees who feel secure in their job have a sense of belonging in the work they perform for the company.

21 Maslow’s hierarchy of needs (https://www.simplypsychology.org/maslow.html) is a theory encompassing a pyramid-shaped hierarchy and identifies five levels of human needs which build on each other from bottom to top. From bottom to top, they are Physiological Needs (food, water, shelter), Safety and Security (health, employment, social ability), Love and Belonging (friendship, family, sense of connection), Self-esteem (confidence, respect of others, achievement), and Self-actualization (morality, acceptance, meaning).
CHAPTER 4: DISCUSSION & CONCLUSION

Analysis of WHOLE Assessment – Well-being and Health of Organization

I reiterate LYTE’s commitment to being an anti-authoritarian and anti-hierarchal organization focused on breast cancer survivorship and advocacy. That is at the forefront of the WHOLE Assessment as the purpose is to look at an organization holistically—the institution itself, its leadership, and its workers. There is no place for an hierarchic mindset when the well-being of employees should be just as important as management and the larger establishment.

Chapter 4 brings the W, H, and O of WHOLE Assessment – Well-being and Health of the Organization – in my analysis of the results.

Leadership Traits

The WHOLE Assessment of LYTE determined necessary leadership traits comprise being inclusive, listening, being transparent, having open communication, being vulnerable, and respecting boundaries.

A common thread among all of these leadership traits is communication. To be inclusive, transparent, and vulnerable, one must be able to communicate well. For example, being inclusive requires being intentional in the way leaders communicate and perform actions. Wormington (2023) reminds us that focusing on being open, accountable, consistent, and purposeful in communications increases the chances of an inclusive workspace. Similarly, being vulnerable requires communication. Omadeke (2022) provides a few examples of this such as (1) speaking up publicly about our own values and beliefs, (2) avoiding oversharing, which can feel selfish or an emotional burden to others, and (3) being honest with our struggles, especially
coming from leaders who could typically be seen as standoffish. This leads to transparency and communication. Some ways Cooks-Campbell (2022) suggests being transparent with staff is to:

- Deliver changes/updates to the team as soon as possible, reinforcing their trust;
- Provide honest and constructive feedback;
- Communicate expectations regularly so that staff are aware of their on-going tasks;
- Share the company’s status as a way for staff to feel confident in their contributions to the organization, plus being transparent about it may lead to unique solutions from team members; and
- Completely explain decisions and encourage staff to ask questions/share feedback, so that staff feel they are valued members.

Overall, building transparency into the workplace builds trust and dedication to the organization. Leadership should initiate transparency by communicating with their team and listening to them.

Another leadership trait is listening. Arshad (2023) explains that listening is about empowering employees to express themselves. For example, listening to staff’s ambitions can help management provide appropriate professional development, getting more value out of employees. Similarly, asking staff for their input can benefit employee morale because the employee feels their concerns are appreciated. Arshad (2023) links listening to learning, which is a great tool for LYTE as many, if not all, staff are students. Leaders can create a ‘fail-fast environment’ where staff are allowed to test innovative concepts and quickly receive feedback that corroborates or invalidates their theory (Arshad, 2023). What’s important is the constructive feedback because it generates collaboration and communication, while also being a safe space to grow. Leaders who encourage staff to freely share and listen to them build safer workspaces.
Respecting boundaries is something which us on the C-Suite team must constantly practice for staff, and ourselves. Encouraging staff to set their own boundaries allows leadership to set expectations and respect them fully. For instance, staff should express to with leadership what their top priorities are in both their professional and personal lives. Staff who are unpaid cannot or should not commit 100% of their time to LYTE, but setting those limits will help leadership respect them. Personal boundaries are also important for leaders to enact because a leader should not be an employee’s friend. Being a friend to an employee can lead to an inability to be impartial, give constructive criticism, and let go of underperforming staff (Von Yokes, 2020). It’s perfectly understandable that a good working relationship starts with being friendly, but it is still important to be professional by for instance avoiding oversharing and/or socializing one-on-one outside of work.

**Actionable Items**

As a reminder, these actionable items include clarifying roles and responsibilities, providing applicable experiences, being flexible and collaborative, and ensuring authentic appreciation.

Many of these items are easily achievable. For example, clarifying roles and responsibilities is a priority in the strategic plan that involves the executive committee discussing how to implement the organizational chart. Similarly, providing applicable experiences is an ongoing process with the universities that LYTE Foundation partners with. Each university has a list of prerequisites an intern must fulfill and LYTE will continue to follow said requirements to ensure a fulfilling experience for the student. Ensuring authentic appreciation is something leadership can do by utilizing the love languages that each staff member prefers, as Participant 4 (Student) said when they were a “words of affirmation person”. Something that each current and
future staff member could do is take a quiz on their Language of Appreciation\(^{22}\). LYTE leadership can keep a repository of responses and adequately utilize each person’s individual appreciation needs.

Flexibility is achieved by leadership being continuously communicative with staff and vice versa so that everyone understands when additional help is needed. Collaboration is achieved by breaking down silos and working across groups and teams. Riberto, Giacoman, & Trantham (2016) suggest a few ways to do this.

- Bring clear messaging by aligning governance (e.g. the Board of Directors) and the C-Suite team (e.g. Executive Committee) to lead the change;
- Create cross-functional teams, such as bringing together team representatives for meetings;
- Designate co-leaders of teams so that each leader can enforce accountability and encourage collaboration, which can be done by having multiple leads of areas;
- Enact clear roles and responsibilities for team members, which is already one of the themes under this category;
- Try to keep teams in the same physical location, to reduce scheduling issues, which was a suggestion presented by Participant 2 (Student); and
- Designate who has the final decision-making authority or identify a few people who have the authority to do so.

Riberto, Giacoman, & Trantham (2016) reminds the reader that silos are hard to break down but doing so only improves collaboration and trust amongst teams.

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\(^{22}\) The *5 Languages of Appreciation*, an off shoot of the Love Languages Quiz, allows participants to discover their appreciation language in the workplace, what it means, and how to use it to connect with others.
Analysis of WHOLE Assessment – Leadership

As I was completing my interviews, something interesting happened. At this point, I had conducted ten interviews and none of the interviewees had any concerns regarding the phrasing of my questions. Then I interviewed my two industry experts. I was questioned on my use of the word ‘leader’. Participant 11 specifically wanted me to clarify if I wanted to know more about leaders or managers. The question took me off guard as I realized I did not understand that there was a distinction between the two. I eventually explained that since I used the word ‘leader’ in my questions, they could answer with that term in mind. After those last two interviews, I realized there is a deeper issue between talented managers and leaders.

Managers maintain structure in their organization. Zaleznik (2004) explained that managers usually perceive work as a process wherein combination of people and ideas interact to determine goals and develop plans. Managerial goals often result from a current need rather than future targets for the organization because their focus is on ensuring the company continues to be profitable or in the case of nonprofits, mission driven. Conversely, leaders take a more intellectual approach as leaders are not typically afraid to take risks, question existing situations, and challenge their team to improve. Leaders aim to develop new approaches to problems and bring about solutions to concerns through new, sometimes groundbreaking, processes (NSLS, 2022). In truth though, it is not a manager versus leader mindset that leadership should embody. Rather, good leaders have a mixture of management and organizational skills to help their team be effective, thus requiring both mentalities.

Analysis of WHOLE Assessment – Employee

LYTE Foundation is a new organization that is staffed mostly by students and breast cancer advocates, the majority of whom are unpaid volunteers. This qualitative study provided
the foundations of a tangible strategic plan to support LYTE’s organizational growth and continued success. Originally, the goal was just to interview LYTE employees and leadership, but through networking channels, I was able to interview two individuals with experience restructuring companies to better fit with today’s employee needs. This additional data enriched my research and complimented the actual experiences of LYTE employees. Furthermore, research being conducted outside of this dissertation corresponded with the results of my dissertation in that younger employees are looking for a different work environment—one that fits better with their own personal values.

**Current Worker Experiences**

The next generation of workers—Millennials, Gen Z, and Gen Alpha—are no longer willing to accept an exclusively hierarchal and individualistic management style. Workers known as ‘traditionalists’ are interested in titles, advancement opportunities, and a hope that their hard work will be recognized. De Smet et al. (2022) rationalizes that post-COVID employment looks different in that many workers are reevaluating what is important to them in a job [Figure 8].
Post-COVID, employees are looking for meaning in their workload and their connection to the company’s bigger picture. Rosalsky (2022) explains why workers are requesting better work environments, pay, and treatment. More specifically, some of the same categories seen in Figure 8—such as workplace flexibility, health and well-being, meaningfulness of work, and inspiring leaders—are the same drivers of worker retention. For example, terms such as ‘quiet quitting’, ‘JOMO’, ‘goblin mode’, ‘productivity paranoia’\textsuperscript{23}, arose from younger employees wanting to find a balance between work and their personal lives, thus coining phrases that align

\textsuperscript{23} “Quiet quitting” is reserving one’s energy for interests which are non-work related. “JOMO” stands for ‘Joy of Missing Out’, meaning a state of happiness that includes not doing anything (the opposite of FOMO). “Goblin mode” is a rejection of immaculate presentation and embracing one’s truer self-image. “Productivity paranoia” is a fear from leadership that hybrid work leads employees to be less productive when in reality, most are more productive working away from the office environment.
with their principles (Microsoft WorkLab, n.d.). Pulling from Figure 8, phrases such as “adequacy of reliable and supportive people at work”, “adequacy of caring and inspiring leaders”, “adequacy of inclusivity and welcomeness of community,” and “meaningfulness of work” all coincide with the themes that emerged from my research. Participants in my study wanted authenticity in their leadership, a purpose in their work, and a respect for boundaries. Therefore, responses from my research align with what has been recently depicted in the data regarding post-COVID workplace sentiment.

**Limitations**

*Using WHOLE Assessment*

The motivation for this dissertation was to help LYTE Foundation continue to be successful in times to come. Unfortunately, I was not able to find much research that aligned with LYTE’s values in being anti-hierarchal and anti-authoritarian minded, let alone those that concentrated on breast cancer survivorship advocacy. Due to this unique convergence, I developed WHOLE Assessment as a focus on the entire organization, its leadership, and its employees. I suggest future studies be conducted using WHOLE Assessment as a baseline for any organization rooted in anti-authoritarian leadership.

**Duality of Student and Leader**

I know that people are the most valuable asset for any organization. Throughout my time in academia and working, I’ve met many individuals who juggle multiple responsibilities. As LYTE is mostly staffed with students, the student and leader identities tend to blend. This does not even include other identities such as those with families, paid employment, and personal lives. With people’s multiple identities merging, there is more research that could be done on how all of those identities impact workplace well-being.
**Research on Leadership**

Much of this dissertation focused on what leadership should be doing to be better for employees. What ended up getting lost in this research is leadership itself. In my paid employment as an assistant director, I reflect on my position as middle management where I would receive feedback from my team but also from upper management. Being a lead can be a lonely place on the organizational chart as there are fewer people the higher up one goes climbs the organizational ladder, so staff in leadership positions are sometimes overlooked. Employees cannot fully understand because they have their own issues, and leadership’s role is to help them, not bog them down with issues unrelated to their tasks. Additionally, higher management sometimes has expectations that are difficult to achieve and implement without more context but with no one to collaborate with on larger picture issues, a lead can spin in their own head. I did not get to explore this aspect of *WHOLE Assessment* as much as I would have preferred. Future studies should more deeply analyze leadership experiences specifically through the *WHOLE Assessment*.

**Qualitative Research**

Like other qualitative studies, the results from my dissertation are limited to the responses of my participants. This study is not generalizable as its focus was on LYTE Foundation as an organization, though I assert that the methodologies of this study and lessons learned are translatable to other contexts and organizations. For instance, sample bias is a limitation in that most of the participants were chosen because of their relationship to LYTE. Similarly, another limitation is researcher bias. As much as I hoped to engender trust in my participants by self-reflecting on my position as the COO and how that could impact my interactions with participants, I cannot guarantee that my participants were completely honest with me in their
responses. The data collected outside of this dissertation though (see De Smet et al., Rosalsky, and Figure 8) shows an alignment with participant responses.

Finally, qualitative research is time consuming. As most of the participants remain working with LYTE, I could have continued to speak with them, following their work trajectory to more deeply assess LYTE. Alas, at some point I had to stop collecting data and adding more tasks to my plate in order to create structure and boundaries to the research project and to focus on the actual development of the strategic plan. Future studies should continue to assess LYTE’s organizational condition, achievement of strategic plan objectives, and well-being of staff, especially since a new strategic plan ought to be developed every few years.

**LYTE’s Proposed Strategic Plan**

As a strategic plan is only good for a few years, more research into LYTE and its anti-hierarchal and anti-authoritarian mindset should be assessed. Next steps for this dissertation are to introduce the strategic plan to LYTE’s Board of Directors. From this, the Board can begin the process of deciding on LYTE’s goals for the next few years and continue the strategic planning process by creating objectives and activities to realize the goals. As each goal and corresponding activities are solidified, LYTE’s executive committee will meet to discuss how each activity should be implemented. Throughout the years the plan is implemented and evaluated, the executive committee will return to present the results to the Board of Directors to ensure that all activities are appropriately assessed.

The development of a strategic plan is the blueprint for which LYTE Foundation will plan its next few years. The creation of the strategic plan involves using the mission statement to create measurable goals and priorities for implementation (National Council of Nonprofits, n.d.). I modeled my strategic plan after the First Nations Financial Management Board (2017) and their
Strategic Planning Process sample template, which is to be presented to LYTE’s Board of Directors [Appendix H]. Of note on this agenda is that there is only one initiative presented and discussed. The goal is not to inundate the board with multiple points but rather to begin a lively dialogue on LYTE’s direction. As such, the following board meeting’s agenda would include discussion of another initiative and so forth.

Some of the actions listed on the proposed plan have already been implemented or will be implemented soon. For example, breast cancer advocacy is clearly already at the forefront of LYTE Foundation. Similarly, branding is an ongoing process as LYTE has been working with marketing individuals and graphic designers to create a kit to be used by anyone wanting to highlight LYTE Foundation. A DrPH student working with LYTE is creating an on-boarding process for every individual wanting to join LYTE. Furthermore, Dr. Clague DeHart is not the only one who leads weekly meetings now. We try to rotate with other team leads, to provide leadership opportunities and continue the anti-authoritarian work. Creating an official organizational chart (which we did not develop prior to this research) helped clarify who oversees what areas, providing order. Although these are already being implemented, I have listed some of these in-progress activities on the strategic plan because I wanted to underscore their importance and remind leadership that these actions need to be continuously supported.

**Presenting to Board of Directors**

Although I have completed the research and developed the start of a strategic plan as part of this dissertation project, it is important to note that the strategic plan is a process developed collaboratively with a team. My dissertation and research serve the purpose of steps 1 and 2 of the Strategic Planning wherein I have analyzed gaps in knowledge around breast cancer survivorship nonprofit organizations and how LYTE Foundation, as a nonprofit, can better
support breast cancer survivors from a holistic perspective through organizational development and caring for the well-being of all LYTE staff. This dissertation serves as the instigator for strategic planning; delivering these recommendations to the Board of Directors is a way to include their input so that we have an inclusive process. Presenting my plans successfully achieves Strategic Planning step 3 and receiving the board’s input achieves Strategic Planning steps 4, 5, and possibly 6.

**Executive Committee Meetings**

The Board of Directors’ role is to oversee an organization’s management and guide strategies for success and the LYTE C-Suite team/Executive Committee’s role is to make final decisions and manage the workplace. Further, an Executive Committee is a subset of the Board of Directors (McDonald, 2022). Although the strategic plan is typically envisioned by the Board of Directors, I alone developed a good portion of the plan, but it is the LYTE C-Suite team’s responsibility to finalize how to operationalize the activities. Thus, I expect step 7 of the strategic planning process to be reserved for the Executive Committee. For example, topics such as building relationships, establishing consistent meetings, and managing expectations should be more concretely discussed by the Executive Committee rather than with the Board of Directors, who has already decided that tasks such as these align with larger goals and objectives.

Currently, the C-Suite team meets weekly to discuss topics pertaining to management of LYTE. This meeting is less formal than a board meeting and no notes are taken, but nonetheless an agenda is still useful to ensure planning is moving forward [Appendix I]. This agenda and meeting’s purpose is to discuss how to implement the activities. Discussion of activities include choosing meeting times, planning get-togethers, and deliberating how to share the information
with employees. Future meetings would, and should, involve other tasks related to LYTE’s goals and objectives.

**Considerations for Other Nonprofit Organizations**

I did not set out to create an entirely unique intervention and assessment process. In fact, my original goal was to apply current theories and frameworks to LYTE and come to a reasonable conclusion. What I ended up discovering, and being pushed to create, was something wholly unique: the *WHOLE Assessment*. Throughout the course of writing this, we at LYTE have already started implementing some of the themes that came about from my research and some we are preparing to present to the team. *WHOLE Assessment* has created the steps necessary for future considerations.

The uniqueness of LYTE is derived from the fact that it is an anti-authoritarian and non-hierarchal organization focused on community-based advocacy for breast cancer survivorship, and its transdisciplinary approach to supporting survivors. However, general application of the *WHOLE Assessment* is possible for any organization looking to develop, grow, or change its structure to be likeminded. The only standing requirement is that incorporating not just leadership but also employees be the forefront of the organization’s goals, and any baseline assessment be focused on employee well-being as a catalyst for organizational success.

**Next Steps for WHOLE Assessment for LYTE**

LYTE Foundation is a rather new organization that is continuing to change even as I wrote my dissertation. Similarly, my data collection shifted as I developed my methodology, consequently impacting my results. Regardless, the outcomes and results still proved to be informational to LYTE and helped focus my analysis. LYTE is exceptional because not only is it targeting an often-overlooked population (the employees), but because of the way we operate.
When Dr. Clague DeHart and I talked about how we wanted to operate LYTE, we both recognized from the very beginning we did not want a top-down hierarchy where employees blindly followed orders with no regard for anyone besides the bottom line. We wanted collaboration, communication, and an inclusive environment, not just for patients, but for staff.

To be inclusive, transparent, and vulnerable, one must be able to communicate. Focusing on being open, accountable, consistent, and purposeful in communications increases the chances of an inclusive workspace. For example, speaking up publicly about our own values and beliefs; avoiding oversharing, which can feel selfish or an emotional burden to others; and being honest with our struggles, especially coming from leaders who could typically be seen as standoffish; are all ways to build an inclusive company culture. Enacting transparency in the workplace builds trust and dedication to the organization. Flexibility is achieved by leadership being continuously communicative with staff and vice versa so that everyone believes themselves to be an integral part of the team. Collaboration is achieved by creating cross-functional teams and breaking down silos, which I recognize can be hard to destroy but doing so only improves collaboration and trust amongst teams. My research emphasizes a shift towards a more holistic approach to employee health in the workplace. By highlighting employee well-being, organizations will witness long-term growth and develop a company culture based on high self-confidence, leading to an increase in structural effectiveness.
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APPENDICES

Appendix A: Researcher Self-Disclosures
Appendix B: IRB Paperwork
Appendix C: Recruitment Email
Appendix D: Consent Form
Appendix E: Interview Guide
Appendix F: Post-Interview Questionnaire
Appendix G: Question Codes
Appendix H: LYTE Foundation’s Strategic Plan
Appendix I: Sample Agendas
Appendix A: Researcher Self-Disclosure

Vir-Iaesta Maniquiz Vergel de Dios, MPH, CHES
Claremont Graduate University
School of Community and Global Health
Doctor of Public Health (DrPH) Candidate

Self-Disclosure: Educational and Professional Background

Educational Background: I attended Los Angeles Pierce College and transferred to California State University, Northridge where I obtained my Bachelor in Health Science, with a concentration in Health Education. I continued with my Master of Public Health in Health Education again from California State University, Northridge. I am completing my Doctor of Public Health from Claremont Graduate University with a focus in Leadership and Management and certificate in Evaluation.

Professional Background: My experience is in health education/health promotion and mentorship/supervision. My expertise is in program planning, implementation, and evaluation. I have supervised students and staff at multiple academic institutions, such as Taft Charter High School; Los Angeles Pierce College; California State University, Northridge; Pasadena City College; and California State University, Fullerton. While working at Cal State Fullerton as the Assistant Director of TitanWELL Health Promotion Services, I was introduced to LYTE Foundation Inc., developed by Dr. Jessica Clague DeHart. I helped create and launch LYTE Foundation, with Dr. Clague DeHart offering me the role of COO in November 2022. I gain no financial benefit from being part of LYTE.
Appendix B: IRB Paperwork

Application Section: Research Outline

4599. Interviews with LYTE (Living Your Truth Empowered) Foundation Employees

<table>
<thead>
<tr>
<th>Research Outline</th>
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<tbody>
<tr>
<td>Briefly (100 words or less) describe the overall goals of this study/project in lay language. What is the project designed to investigate, discover, or test?</td>
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<tr>
<td>Answer: Suggested Word Count Limit: 200, Current Word Count: 73</td>
</tr>
<tr>
<td>LYTE Foundation is a non-profit 501(c)(3) organization that was created to address the needs of a nationally growing breast cancer survivor population. As the Chief Operating Officer, it is my responsibility to maintain daily operations, support other senior executives and employees, and develop and implement policies that support the organization's goals and policies. The purpose of my dissertation is to help guide LYTE Foundation’s organizational development and provide recommendations for its continued success.</td>
</tr>
</tbody>
</table>

Describe the role of human subjects in this study, including a brief (200 words or less) summary of the procedures, paying special attention to what will happen to subjects and what they will be told about the study.

Note: If there are multiple phases in the study/project, provide the description for each phase, and clearly enumerate the phases.

Answer:
Semi-structured interviews with LYTE leadership, including the Chief Officers and Board of Directors, and a focus group with employees, including as Associate Directors, will be used to develop a strategic plan for LYTE Foundation's development. Participants will be asked questions about what makes a good breast cancer non-profit organization, including company culture, current work conditions, motivation for working with LYTE, and what they believe to be the characteristics of ideal leadership.

Those who choose to participate will be provided the questions beforehand. They will be told exactly the purpose of the study and how it will be beneficial to LYTE Foundation's continued success.

Subjects and Recruitment

Describe the population you propose to study. To whom would your conclusions apply?

Answer: Suggested Word Count Limit: 100, Current Word Count: 25
I propose to study the employees, paid or volunteer, of LYTE Foundation. This includes the Chief Officer team, the Board of Directors, and Associate Directors.

Describe the sample, including the approximate numbers of subjects to be recruited and expected to complete the study, differentiating these numbers for each phase or type of project element, if multiple.

Answer:
Individual semi-structured interviews will be conducted with one Chief Executive Officer, one Chief Financial Officer, and three Board of Directors at LYTE Foundation.
A focus group will be conducted with at least five Associate Directors, but no more than 10, at LYTE Foundation.
09/25/2023 7:46 PM PDT

Clearly state all inclusion/exclusion criteria for participation.

Answer: Current Word Count: 18
Only those who work with LYTE Foundation will be allowed to participate in the interview or focus group.

For each phase or type of project element, describe the recruitment procedures, including how and where potential subjects will first be made aware of the project or of the particular project phase or element and list the recruiting tools (email, HIT text, flyer, oral invitation, social media notice, etc.) you plan to use. A copy of each recruiting tool should be included with your protocol.

Answer: Current Word Count: 82
I am recruiting from within LYTE Foundation. All participants were verbally informed that they will be asked to participate in this study.

I, and the CEO of LYTE Foundation, informed the Chief Officer team and Board of Directors of my dissertation, its purpose, and their optional participation in it when we had our first board meeting in November 2022.
Thank you for participating in this focus group. I truly appreciate all your thoughts and feedback.

I want to remind you that if you have any questions or would like additional information about this study, you may speak with me privately or speak with Dr. DeHart. The CGU Institutional Review Board (IRB) has approved this project/certified this project as exempt. If you have any concerns about this project, you may contact the CGU IRB. Please refer to the Informed Consent Form for everyone’s contact information.

Again, thank you and have a good day.

**Potential Risks and Benefits**

For the following items, describe the risks and specific benefits, as requested in each item. If risks are greater than minimal (the degree of risk one faces in everyday life), it is especially important to describe how the benefits might justify such risks.

Describe the nature and degree of real and potential risks to the subject, including possible inconvenience, discomforts, or negative consequences of a breach of confidentiality; and any risks to non-subjects. The lowest level of risk may be described as “minimal.”

*The extent of risks described here should match the level of risk communicated during the informed consent procedure.*

**Answer:** Current Word Count: 117

Potential risks to participating in the study could include:

- Information risks such as loss of privacy or a breach of confidentiality; and/or
- Psychological risks when responding to questions such as fear, stress, confusion, or guilt.

The likelihood of these risks occurring is minimal, but I do plan on minimizing these risks by:

- Information risks: Ensuring all data is in a password protected computer and accessible only by me, and they can choose to keep their camera off and/or change their name on Zoom so that the recording reflects non-identifiable information
- Psychological risks: Explaining before the start of the interview that participants can decline not to answer a question or stop participating at any time (addressing psychological risks)

Describe definite or potential benefits to the subject, if any, anticipated as a direct result of participating in the research.

*Note:* Compensation is not a benefit.

**Answer:** Current Word Count: 11

I do not expect the study to benefit the participants personally.

Describe definite or potential benefits to the researcher.

**Answer:** Current Word Count: 21

This study will benefit me, the researcher, by identifying the best organizational practices for LYTE from a leadership and employee perspective.

Describe the expected benefits beyond the research subjects, if any, to a specific social group or institution.

**Answer:** Current Word Count: 47

The data I collect will be used for my doctoral dissertation tentatively titled, “LYTE Foundation: The Development of a Transdisciplinary Breast Cancer Survivorship Organization,” as well as for other scholarly reports, presentation, and/or publications. Based on the title, this study is also intended to benefit LYTE Foundation.

Describe the expected scientific benefits of the study.

**Answer:** Current Word Count: 31

The scientific benefit of this study is an aspirational benefit to expanding the knowledge of how to build and sustain a breast cancer non-profit organization by creating a supportive organizational structure.

**Requested Documents**

- **Recruiting Materials**
  09/19/2023 Recruitment Tool for Associate Directors.docx
  09/19/2023 Recruitment Tool for COOs and Board of Directors.docx

- **Consent/Aeasent Forms**
I, and the CEO of LYTE Foundation, informed the Associate Directors through continuous meetings, either individual or group, starting in Spring of 2003.

09/07/2023 11:22 PM PDT

Describe any compensation or incentives that will be offered.

Answer:
I will not provide any compensation or incentives for participating in my study.

Is any temporary deception of subjects planned?

Answer:
Yes
✓ No

Describe the process of gaining informed consent to participate in each phase or type of research element. In addition, upload (at the bottom of this page or on the main protocol page) a copy of each written consent or assent form or script that is to be used.

Answer: Current Word Count: 67
Before agreeing to the interview or focus group, participants will be e-mailed the appropriate Informed Consent Form. By electronically signing the form and sending it back to me, the participant agrees to be part of the study.

On the day of their interview, participants will be asked to provide verbal consent prior to the start of the interview as interviews will be recorded for transcription and analysis.

09/06/2023 10:25 PM PDT

Research Procedures and Methods

Describe the research procedures, including data collection procedures and materials, and when and where research will take place.

Upload copies or images of the actual materials to be employed—such as questionnaires, interview protocols, media to be shown to subjects, pictures of apparatus to be used—in final form to the extent possible, otherwise in draft or outline form. Indicate whether attachments are draft or final. (Note: Data collection materials must be in final form before they can be approved for use in the study.) For secondary data analysis, please upload a codebook (or at the very least, a list of all variables that will be used).

Answer:
I will send participants an email, asking them to schedule a time for an interview or focus group. Once they confirm their participation, I will send a copy of the informed consent using DocuSign. Further, they will be sent a calendar invite that includes the Zoom link for the meeting and all the questions I will ask them.

On the day of the Zoom meeting, I will start the interview (attached as Protocol) by introducing myself and explaining the research project to them. I will then ask for their agreement to record the interview. Once I receive their verbal agreement, I will start the recording and ask them the questions (attached as Questions). Once the interview is complete, I will thank them for their time and remind them that if there were any issues/concerns related to the interview that they can contact Dr. DuHart and/or CGU IRB.

All files, including the informed consent form and the recording, will be safely stored on a computer only I have access to and which is password protected.

Describe procedures for maintaining subject confidentiality or anonymity, especially if tape recording, photographs, movies or videotapes will be used.

Answer: Current Word Count: 74
All Zoom recordings will be safely stored in a digital folder, only accessible by me. On the day of the Zoom interview, participants will be provided the opportunity to keep their camera off and/or change their name to a pseudonym. Once every participant has made and implemented their decisions, I will start the recording, if allowed by the participant.

Each participant will be assigned a unique code that only I am able to decode.

If applicable, please describe the subject debriefing procedures here, and upload debriefing documents or scripts at the end of this section (or paste the text here).

NOTE: If information about the research will be temporarily withheld during the consent process in order to mislead or deceive the subject, the deception must be fully disclosed in a debriefing after participation is completed, and the subject must be offered an opportunity to withdraw from the study.

Answer: Current Word Count: 93

86
09/07/2023 Informed Consent for AD.docx
09/07/2023 Informed Consent for CO and BoD.docx

• Data Collection Materials
  09/07/2023 Focus Group Briefing Protocol.docx
  09/07/2023 Interview Briefing Protocol.docx
  09/20/2023 Questions for Focus Group.docx
  09/20/2023 Questions for Individual Interviews.docx

• Debriefing Materials
Appendix C: Recruitment Emails

Employee/Staff Email

Dear Participant Name,

As you are aware, I am a doctoral candidate in the School of Community and Global Health at Claremont Graduate University. As part of my doctoral dissertation, I am conducting a research study tentatively titled “The Development of a Transdisciplinary Breast Cancer Survivorship Organization” to understand what qualities create an effective breast cancer nonprofit organization. As part of the associate director team, I am asking if you would be interested and willing to participate in a focus group.

Participation in the study can take up to 120 minutes. If you would like to participate, I will ask that you:

1. Confirm that you are willing and able to participate by filling out this Doodle Poll to find a day and time that works best within the next three weeks.
2. Sign an informed consent form to that will be sent to you via DocuSign.
3. Participate in a recorded focus group via Zoom where you will be asked a series of questions about your experience with LYTE Foundation.

Participation is voluntary and there are no consequences for choosing not to participate or withdrawing from the study. Confidentiality of all participants will be maintained. The data will be kept secure and password protected.

Once a day and time is set, I will send you a calendar invite that includes the Zoom meeting link and a list of questions you will be asked.

Any additional questions regarding the project can be directed to me, Vir-iaesta Vergel de Dios at [my phone number] or [my email address].

Thank you for your consideration and I look forward to speaking with you.

Respectfully,

Vir-iaesta “Vir” Vergel de Dios, MPH, CHES
Doctor of Public Health (DrPH) Candidate
School of Community and Global Health, Claremont Graduate University
Leadership Email

Dear Participant Name,

As you are aware, I am a doctoral candidate in the School of Community and Global Health at Claremont Graduate University. As part of my doctoral dissertation, I am conducting a research study tentatively titled “The Development of a Transdisciplinary Breast Cancer Survivorship Organization” to understand what qualities create an effective breast cancer nonprofit organization. As part of the leadership team, I am asking if you would be interested and willing to participate in an individual interview with me.

Participation in the study can take up to 60 minutes. If you would like to participate, I will ask that you:

1. Confirm that you are willing and able to participate by filling out this [Doodle Poll](#) to find a day and time that works best within the next three weeks.
2. Sign an informed consent form that will be sent to you via DocuSign.
3. Participate in a recorded interview via Zoom where you will be asked a series of questions about your experience with LYTE Foundation.

Participation is voluntary and there are no consequences for choosing not to participate or withdrawing from the study. Confidentiality of all participants will be maintained. The data will be kept secure and password protected.

Once a day and time is set, I will send you a calendar invite that includes the Zoom meeting link and a list of questions you will be asked.

Any additional questions regarding the project can be directed to me, Vir-laesta Vergel de Dios at [my phone number](#) or [my email address](#).

Thank you for your consideration and I look forward to speaking with you.

Respectfully,

Vir-laesta “Vir” Vergel de Dios, MPH, CHES
Doctor of Public Health (DrPH) Candidate
School of Community and Global Health, Claremont Graduate University
Appendix D: Consent Forms

Focus Groups

Claremont Graduate University

AGREEMENT TO PARTICIPATE IN AN INTERVIEW FOCUSED ON LYTE FOUNDATION (IRB # 4599)

You are invited to interview for a research project. Volunteering will not benefit you directly, but you will be helping the investigator Vir-Iaesta Vergel de Dios. If you volunteer, you will be asked to answer questions focused on the LYTE Foundation. This will take about 90 to 120 minutes of your time. Volunteering for this study involves no more risk than what a typical person experiences on a regular day. Your involvement is entirely up to you. You may withdraw at any time for any reason. Please continue reading for more information about the study.

STUDY LEADERSHIP: This research project is led by Vir-Iaesta Vergel de Dios, a DrPH student from the School of Community and Global Health at Claremont Graduate University, who is being supervised by Jessica Clague DeHart, Associate Professor at Claremont Graduate University.

PURPOSE: The purpose of this project is to learn about the most effective organizational development strategies for a new breast cancer survivorship non-profit.

ELIGIBILITY: To be eligible for this study, you must work with LYTE Foundation.

PARTICIPATION: During the study, you will be asked to answer questions related to LYTE, its organizational structure, and your work. These questions will be made available to you in advance, and you have the right not to answer any question. This will take about 90 to 120 minutes.

RISKS OF PARTICIPATION: The risks that you run by taking part in this study are minimal. The focus group will occur online using Zoom, and I would like to record it. Please let me know if you do not want to be recorded; you may also change your mind after the focus group starts.

BENEFITS OF PARTICIPATION: I do not expect the study to benefit you personally. This study will benefit the researcher by identifying the best organizational practices for LYTE from a leadership and employee perspective. The data collected will be used for a doctoral dissertation tentatively titled, "LYTE Foundation: The Development of a Transdisciplinary Breast Cancer Survivorship Organization," as well as for other scholarly reports, presentation, and/or publications. Based on the title, this study is also intended to benefit the LYTE Foundation.

COMPENSATION: You will not be directly compensated for participating in this study.

VOLUNTARY PARTICIPATION: Your participation in this study is completely voluntary. You may stop or withdraw from the study or refuse to answer any particular question for any reason at any time without it being held against you. Your decision whether or not to participate will have no effect on your current or future connection with anyone at CGU or the LYTE Foundation.

CONFIDENTIALITY: Your individual privacy will be protected in all papers, books, talks, posts, or stories resulting from this study. I may use the data we collect for future research or share it with other researchers, but I will not reveal your identity with it. In order to protect the confidentiality of your responses, you will be assigned a pseudonym. All video and audio recordings will be saved on my personal computer, in an encrypted folder with a password that is only accessible by me. The recordings will be deleted no later than 5 years.
FURTHER INFORMATION: If you have any questions or would like additional information about this study, please contact Vir-laesta Vergel de Dios at [phone number] or [email address]. You may also contact Dr. DeHart at [phone number] or [email address]. The CGU Institutional Review Board (IRB) has approved this project/certified this project as exempt. If you have any ethical concerns about this project or about your rights as a human subject in research, you may contact the CGU IRB at (909) 607-9406 or at irb@cgu.edu. A copy of this form will be given to you if you wish to keep it.

CONSENT: Your signature below means that you understand the information on this form, that someone has answered any and all questions you may have about this study, and you voluntarily agree to participate in it.

By checking the below box and listing your name and the date, you agree to be part of this study.

☐ I, _______________________________, agree to participate in this study on this date ________________________________.

________________________________________

The undersigned researcher has reviewed the information in this consent form with the participant and answered any of their questions about the study.

Signature of Researcher ___________________________ Date __________________________

Printed Name of Researcher ___________________________
You are invited to interview for a research project. Volunteering will not benefit you directly, but you will be helping the investigator Vir-laesta Vergel de Dios. If you volunteer, you will be asked to answer questions focused on the LYTE Foundation. This will take about 45-60 minutes of your time. Volunteering for this study involves no more risk than what a typical person experiences on a regular day. Your involvement is entirely up to you. You may withdraw at any time for any reason. Please continue reading for more information about the study.

**STUDY LEADERSHIP:** This research project is led by Vir-laesta Vergel de Dios, a DrPH candidate from the School of Community and Global Health at Claremont Graduate University, who is being supervised by Jessica Clague DeHart, Associate Professor at Claremont Graduate University.

**PURPOSE:** The purpose of this project is to learn about the most effective organizational development strategies for a new breast cancer survivorship non-profit.

**ELIGIBILITY:** To be eligible for this study, you must work with LYTE Foundation.

**PARTICIPATION:** During the study, you will be asked to answer questions related to LYTE, its organizational structure, and your work. These questions will be made available to you in advance, and you have the right not to answer any question. This will take about 45-60 minutes.

**RISKS OF PARTICIPATION:** The risks that you run by taking part in this study are minimal. All interviews will occur online using Zoom, and I would like to record your interview. Please let me know if you do not want the interview to be recorded; you may also change your mind after the interview starts.

**BENEFITS OF PARTICIPATION:** I do not expect the study to benefit you personally. This study will benefit the researcher by identifying the best organizational practices for LYTE from a leadership and employee perspective. The data collected will be used for a doctoral dissertation tentatively titled, “LYTE Foundation: The Development of a Transdisciplinary Breast Cancer Survivorship Organization,” as well as for other scholarly reports, presentation, and/or publications. Based on the title, this study is also intended to benefit the LYTE Foundation.

**COMPENSATION:** You will not be directly compensated for participating in this study.

**VOLUNTARY PARTICIPATION:** Your participation in this study is completely voluntary. You may stop or withdraw from the study or refuse to answer any particular question for any reason at any time without it being held against you. Your decision whether or not to participate will have no effect on your current or future connection with anyone at CGU or the LYTE Foundation.

**CONFIDENTIALITY:** Your individual privacy will be protected in all papers, books, talks, posts, or stories resulting from this study. I may use the data we collect for future research or share it with other researchers, but I will not reveal your identity with it. In order to protect the confidentiality of your responses, you will be assigned a pseudonym. All video and audio recordings will be saved on my personal computer, in an encrypted folder with a password that is only accessible by me. The recordings will be deleted no later than 5 years.

**FURTHER INFORMATION:** If you have any questions or would like additional information about this study, please contact Vir-laesta Vergel de Dios at [phone number] or [email address]. You may also contact Dr.
DeHart at [phone number] or [email address]. The CGU Institutional Review Board (IRB) has approved this project/certified this project as exempt. If you have any ethical concerns about this project or about your rights as a human subject in research, you may contact the CGU IRB at (909) 607-9406 or at irb@cgu.edu. A copy of this form will be given to you if you wish to keep it.

**CONSENT:** Your signature below means that you understand the information on this form, that someone has answered any and all questions you may have about this study, and you voluntarily agree to participate in it.

By checking the below box and including your name and the date, you agree to be part of this study.

☐ I, ____________________________, agree to participate in this study on this date ____________________________.

__________________________________________________________

The undersigned researcher has reviewed the information in this consent form with the participant and answered any of their questions about the study.

Signature of Researcher ____________________________ Date ____________________________

Printed Name of Researcher ____________________________________________
Appendix E: Interview Guide

Protocol and Questions for Employees/Staff

You are invited to interviewed for a research project. Volunteering will not benefit you directly, but you will be helping me, Vir-Iaesta Vergel de Dios. This will take about 90 to 120 minutes of your time. Volunteering for this study involves no more risk than what a typical person experiences on a regular day. Your involvement is entirely up to you. You may withdraw at any time for any reason. Do you understand?

[wait for a verbal yes]

Thank you for your response. I will now go over the project and your participation.

This research project is led by me Vir, a DrPH student from the School of Community and Global Health at Claremont Graduate University, who is being supervised by Dr. Jessica Clague DeHart, Associate Professor at Claremont Graduate University.

The purpose of this project is to learn about the most effective organizational development strategies for a new breast cancer survivorship non-profit.

To be eligible for this study, you must work with LYTE Foundation.

During the focus group, you will be asked to answer questions related to LYTE, its organizational structure, and your work. These questions have been made available to you in advance, and you have the right not to answer any question. Overall, this focus group should take about 90 to 120 minutes.

The risks that you run by taking part in this study are minimal. As the focus group will occur over Zoom, I would like to record your focus group. Please let me know if you do not want to be recorded; you may also change your mind after the focus group starts. I do not expect the study to benefit you personally.

This study will benefit me by identifying the best organizational practices for LYTE from a leadership and employee perspective. The data collected will be used for my doctoral dissertation tentatively titled, “LYTE Foundation: The Development of a Transdisciplinary Breast Cancer Survivorship Organization,” as well as for other scholarly reports, presentation, and/or publications. Based on the title, this study is also intended to benefit the LYTE Foundation.

You will not be directly compensated for participating in this study.

Your participation in this study is completely voluntary. You may stop or withdraw from the study or refuse to answer any particular question for any reason at any time without it being held against you. Your decision whether or not to participate will have no effect on your current or future connection with anyone at CGU or the LYTE Foundation.

Your individual privacy will be protected in all papers, books, talks, posts, or stories resulting from this study. I may use the data we collect for future research or share it with other researchers, but I will not reveal your identity with it. In order to protect the confidentiality of your responses, you will be assigned a pseudonym. All video and audio recordings will be saved on my personal computer, in an encrypted folder with a password that is only accessible by me. The recordings will be deleted no later than 5 years.

If you have any questions or would like additional information about this study, you may speak with me privately. You may also contact Dr. DeHart. If you have any ethical concerns about this project or about your rights as a human subject in research, you may contact the CGU. You were provided the informed consent form to sign and everyone’s contact information is listed there. A copy of the form will be given to you if you wish to keep it.
Before we start the interview, I would like to ask if I can record this so I can listen to it later for anything I can’t remember or did not catch the first time. Do you agree to me recording this interview?

[wait for response]

Thank you for your response. Before I start recording, you are welcome to change your name to protect your identity.

[wait for response]

Thank you. I will now start the recording.

[record and ask questions]

1. Please introduce yourself and your role at LYTE.
2. What makes LYTE stand out from other breast cancer organizations?
3. What are the processes and rules the team sticks with to keep on track?
4. What is the management style like?
5. How do you respond to this style?
6. How effective is LYTE’s management system?
7. What are the most important attributes of successful leaders today?
8. What qualities are lacking among today’s leaders?
9. What advice would you give to incoming leaders?
10. What advice would you give to current leadership?
11. What is the best way for leadership to communicate change to the organization?
12. Change occurs. How do you support the organization through unexpected changes?
13. What brought you to LYTE?
14. What challenges are you facing in your role?
15. What makes you excited to be part of LYTE and complete your tasks?
16. What improvements would you make about LYTE or your role?
17. LYTE’s mission is about empowerment. Do you believe you feel empowered in your role? Why or why not?
18. What would give you positive emotions about LYTE and/or your role?
19. What would give you meaning in this role?
20. How do you believe LYTE leadership can build or create motivation for staff?
21. How do you feel leadership can continue to build relationships with staff?
22. How do you keep employees engaged in this work?
23. What do you believe is the best way(s) to acknowledge achievement?

Thank you for participating in this focus group. I truly appreciate all your thoughts and feedback.

I want to remind you that if you have any questions or would like additional information about this study, you may speak with me privately or speak with Dr. DeHart. The CGU Institutional Review Board (IRB) has approved this project/certified this project as exempt. If you have any concerns about this project, you may contact the CGU IRB. Please refer to the Informed Consent Form for everyone’s contact information.

Again, thank you and have a good day. I will now end the recording.
Protocol and Questions for Leadership

You are invited to interviewed for a research project. Volunteering will not benefit you directly, but you will be helping me, Vir-laesta Vergel de Dios. If you volunteer, you will be asked to answer questions focused on the LYTE Foundation. This will take about 45-60 minutes of your time. Volunteering for this study involves no more risk than what a typical person experiences on a regular day. Your involvement is entirely up to you. You may withdraw at any time for any reason. Do you understand?

[wait for a verbal yes]

This research project is led by me Vir, a DrPH student from the School of Community and Global Health at Claremont Graduate University, who is being supervised by Dr. Jessica Clague DeHart, Associate Professor at Claremont Graduate University.

The purpose of this project is to learn about the most effective organizational development strategies for a new breast cancer survivorship non-profit.

To be eligible for this study, you must work with LYTE Foundation.

During the study, you will be asked to answer questions related to LYTE, its organizational structure, and your work. These questions were made available to you in advance, and you have the right not to answer any question. Overall, this interview will take about 45-60 minutes.

The risks that you run by taking part in this study are minimal. As this interview is to occur over Zoom, I would like to record your interview. Please let me know if you do not want the interview to be recorded; you may also change your mind after the interview starts.

I do not expect the study to benefit you personally. This study will benefit me by identifying the best organizational practices for LYTE from a leadership and employee perspective. The data collected will be used for my doctoral dissertation tentatively titled, “LYTE Foundation: The Development of a Transdisciplinary Breast Cancer Survivorship Organization,” as well as for other scholarly reports, presentation, and/or publications. Based on the title, this study is also intended to benefit the LYTE Foundation.

You will not be directly compensated for participating in this study.

Your participation in this study is completely voluntary. You may stop or withdraw from the study or refuse to answer any particular question for any reason at any time without it being held against you. Your decision whether or not to participate will have no effect on your current or future connection with anyone at CGU or the LYTE Foundation.

Your individual privacy will be protected in all papers, books, talks, posts, or stories resulting from this study. I may use the data we collect for future research or share it with other researchers, but I will not reveal your identity with it. In order to protect the confidentiality of your responses, you will be assigned a pseudonym. All video and audio recordings will be saved on my personal computer, in an encrypted folder with a password that is only accessible by me. The recordings will be deleted no later than 5 years.

If you have any questions or would like additional information about this study, you may speak with me. You may also contact Dr. DeHart. If you have any ethical concerns about this project or about your rights as a human subject in research, you may contact the CGU. You were provided the informed consent form to sign and everyone's contact information is listed there. A copy of the form will be given to you if you wish to keep it.

Before we start the interview, I would like to ask if I can record this so I can listen to it later for anything I can’t remember or did not catch the first time. Do you agree to me recording this interview?
Thank you for your response. Before I start recording, you are welcome to change your name to protect your identity.

Thank you. I will now start the recording.

Please introduce yourself and your role at LYTE.

What are your ideal values for LYTE?

What are the core values the organization was founded upon?

What’s LYTE’s organizational structure?

Who makes the decisions? Who reports to whom?

How is information shared across the organization?

What makes LYTE stand out from other breast cancer organizations?

How do you track progress?

What are the processes and rules the team sticks with to keep on track?

What are the core competencies of the organization? Are these skills sufficiently available?

How many employees are there?

What is the management style like?

How do the employees respond to this style?

What kind of tasks, behaviors, and deliverables does the leadership reward?

What are the most important attributes of successful leaders today?

What qualities are lacking among today’s leaders?

What advice would you give to incoming leaders?

What advice would you give to current leadership?

What is the best way to for leadership to communicate change to the organization?

Change occurs. How do you support the organization through unexpected changes?

What brought you to LYTE?

What challenges are you facing in your role?

What makes you excited to work at this company and complete your tasks?

What improvements would you make about this company or your role?

What would give you positive emotions about this role?

What would give you meaning in this role?

How do you provide meaning to employees in the work they do?

How do you keep employees engaged in this work?

What do you believe is the best way(s) to acknowledge achievement?

Thank you for participating in this interview. I truly appreciate your thoughts and feedback.

I want to remind you that if you have any questions or would like additional information about this study, you may speak with me or with Dr. DeHart. The CGU Institutional Review Board (IRB) has approved this project/certified this project as exempt. If you have any concerns about this project, you may contact the CGU IRB. Please refer to the Informed Consent Form for everyone’s contact information.

Again, thank you and have a good day. I will now end the recording.
Appendix F: Post-Interview Questionnaire

Post-Interview Questionnaire

Hello! Thank you for interviewing for my dissertation. As a final step, I am asking certain demographic information. As I've said before, this information is confidential. Only me, Vir-laesta Vergel de Dios, will see these results. An aggregate version will be made available for my dissertation, but your identity will be kept a secret. Thank you for your participation!

What is your age?
- 17 or under
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

What is your gender?
- Female
- Male
- Trans*
- Nonbinary
- Prefer not to say
- Other: ________________

What is your ethnicity? (check all that apply)
- African American/Black
- Asian
- Latino or Hispanic
- Native American
- Native Hawaiian or Pacific Islander
- White/Caucasian
- Unknown
- Prefer not to say
- Other: ________________

What is the highest degree or level of education you have completed or will complete within the next year?
- High School (including GED)
- Some college (no degree)
- Technical certification
- Associate degree (2-year)
- Bachelor's degree (4-year)
- Master's degree
- In a doctoral program
- Doctoral/Professional degree
- Prefer not to say

What is your employment status? (check all that apply)
- Part-time (less than 30 hours/week)
- Full-time (more than 30 hours/week)
- Part-time school
- Full-time school
- Contract or temporary
- Unemployed
- Retired
### Appendix G: Question Codes

<table>
<thead>
<tr>
<th>Question</th>
<th>For Leadership, Staff, or Both</th>
<th>M7-S / PERMA</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are your ideal values for LYTE?</td>
<td>Leadership</td>
<td>Strategy Style</td>
</tr>
<tr>
<td>What are the core values the organization was founded upon?</td>
<td>Leadership</td>
<td>Strategy Style</td>
</tr>
<tr>
<td>What’s LYTE’s organizational structure?</td>
<td>Leadership</td>
<td>Structure</td>
</tr>
<tr>
<td>Who makes the decisions? Who reports to whom?</td>
<td>Leadership</td>
<td>Structure Systems</td>
</tr>
<tr>
<td>How is information shared across the organization?</td>
<td>Leadership</td>
<td>Systems</td>
</tr>
<tr>
<td>What makes LYTE stand out from other breast cancer organizations?</td>
<td>Both</td>
<td>Superordinate goals</td>
</tr>
<tr>
<td>How do you track progress?</td>
<td>Leadership</td>
<td>Strategy</td>
</tr>
<tr>
<td>What are the processes and rules the team sticks with to keep on track?</td>
<td>Both</td>
<td>Systems</td>
</tr>
<tr>
<td>What are the core competencies of the organization? Are these skills sufficiently available?</td>
<td>Leadership</td>
<td>Systems Skills</td>
</tr>
<tr>
<td>How many employees are there?</td>
<td>Leadership</td>
<td>Structure</td>
</tr>
<tr>
<td>What is the management style like?</td>
<td>Both</td>
<td>Style</td>
</tr>
<tr>
<td>How do the employees/you respond to this style?</td>
<td>Both</td>
<td>Staff</td>
</tr>
<tr>
<td>How effective is LYTE’s management system?</td>
<td>Staff</td>
<td>Strategy Style</td>
</tr>
<tr>
<td>What kind of tasks, behaviors, and deliverables does the leadership reward?</td>
<td>Leadership</td>
<td>Style Achievements</td>
</tr>
<tr>
<td>What are the most important attributes of successful leaders today?</td>
<td>Both</td>
<td>Positive Emotions</td>
</tr>
<tr>
<td>What qualities are lacking among today’s leaders?</td>
<td>Both</td>
<td>Meaning</td>
</tr>
<tr>
<td>What advice would you give to incoming leaders?</td>
<td>Both</td>
<td>Strategy</td>
</tr>
<tr>
<td>What advice would you give to current leadership?</td>
<td>Staff</td>
<td>Strategy</td>
</tr>
<tr>
<td>What is the best way to for leadership to communicate change to the organization?</td>
<td>Both</td>
<td>Style</td>
</tr>
<tr>
<td>Change occurs. How do you support the organization through unexpected changes?</td>
<td>Both</td>
<td>Style</td>
</tr>
<tr>
<td>What brought you to LYTE?</td>
<td>Both</td>
<td>Superordinate goals</td>
</tr>
<tr>
<td>What challenges are you facing in your role?</td>
<td>Both</td>
<td>Strategy Skills</td>
</tr>
<tr>
<td>What makes you excited to work at this company and complete your tasks?</td>
<td>Both</td>
<td>Positive Emotions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Meaning</td>
</tr>
<tr>
<td>Question</td>
<td>Participants</td>
<td>Comments</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>What improvements would you make about LYTE or your role?</td>
<td>Both</td>
<td>Strategy, Structure, Staff</td>
</tr>
<tr>
<td>What would give you positive emotions about this role?</td>
<td>Both</td>
<td>Positive emotions</td>
</tr>
<tr>
<td>What would give you meaning in this role?</td>
<td>Both</td>
<td>Meaning</td>
</tr>
<tr>
<td>LYTE’s mission is about empowerment. Do you believe you feel empowered in your role? Why or why not?</td>
<td>Staff</td>
<td>Engagement, Meaning</td>
</tr>
<tr>
<td>How do you provide meaning to employees in the work they do?</td>
<td>Leadership</td>
<td>Meaning</td>
</tr>
<tr>
<td>How do you believe LYTE leadership can build or create motivation for staff?</td>
<td>Staff</td>
<td>Engagement, Meaning</td>
</tr>
<tr>
<td>How do you feel leadership can continue to build relationships with staff?</td>
<td>Staff</td>
<td>Relationships</td>
</tr>
<tr>
<td>How do you keep employees engaged in this work?</td>
<td>Both</td>
<td>Engagement</td>
</tr>
<tr>
<td>What do you believe is the best way(s) to acknowledge achievement?</td>
<td>Both</td>
<td>Achievements, Positive Emotions, Meaning</td>
</tr>
</tbody>
</table>
Appendix H: LYTE Strategic Plan

LYTE Foundation
2024-2026 Strategic Plan

Mission
Our central mission is to meet the needs of a growing and diverse breast cancer survivor community by providing community-based and locally-tailored charters run by breast cancer advocates who are certified as community health coaches and wellness navigators. Our mission is accomplished through:
- Innovative research and development
- Premier education and training in community health and wellness coaching
- Individualized grant writing preparation and support for charter sustainability
- Strategic academic, medical and industry partnerships
- Continuous outreach to breast cancer advocacy organizations
- Continued support and endorsement of scientific research and wellness programming aligned with breast cancer survivorship

Vision
LYTE will be nationally recognized as the leading breast cancer survivorship organization serving survivors with cutting-edge research, strategically-placed charters, locally-tailored programming, and expertly-trained wellness coaches in an effort to address the needs of the growing and diverse breast cancer survivor community.

Values
Empowerment
Advocacy
Continuum of care

Values can become inherent if LYTE were to adopt certain priorities, outlined below. They are a core part of the individual and therefore not necessarily measurable items. Regardless, I have maintained the same template as the initiatives listed below for consistency with the exception of ‘Timeline’ being replaced by ‘Owner’, as these are fundamental values that should constantly be practiced.

<table>
<thead>
<tr>
<th>Priorities</th>
<th>Activities</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build relationships between C-Suite members and employees.</td>
<td>Develop consistent meetings between C-Suite and employees.</td>
<td>CEO and COO</td>
</tr>
<tr>
<td></td>
<td>Host in-person get-togethers.</td>
<td>Executive Committee and/or Board of Directors</td>
</tr>
<tr>
<td>Keep employee work sustainable.</td>
<td>Cap the number of volunteers/interns that each director should supervise.</td>
<td>CEO and COO</td>
</tr>
<tr>
<td>Respect boundaries.</td>
<td>Provide balance between work at LYTE and other work.</td>
<td>All employees</td>
</tr>
<tr>
<td></td>
<td>Clarify when employees can be contacted (e.g. timeframes, days)</td>
<td>CEO</td>
</tr>
</tbody>
</table>
## Strategic Priorities and Activities

### Initiative #1

Establish a consistent management system for all stakeholders, from Board of Directors to volunteers.

<table>
<thead>
<tr>
<th>Priorities</th>
<th>Activities</th>
<th>Owner</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop clearly defined roles.</td>
<td>Create job descriptions for C-Suite team members.</td>
<td>CEO and COO</td>
<td>TBD</td>
</tr>
<tr>
<td></td>
<td>Clarify Board of Directors’ role.</td>
<td>CEO</td>
<td>TBD</td>
</tr>
<tr>
<td></td>
<td>Provide an on-boarding process for incoming staff.</td>
<td>COO</td>
<td>TBD</td>
</tr>
<tr>
<td></td>
<td>Manage internship/volunteering expectations.</td>
<td>CEO and COO</td>
<td>TBD</td>
</tr>
<tr>
<td>Establish consistent meetings.</td>
<td>Schedule Board of Director meetings.</td>
<td>CEO/Chair</td>
<td>Quarterly</td>
</tr>
<tr>
<td></td>
<td>Schedule LYTE staff meetings.</td>
<td>CEO</td>
<td>Every week</td>
</tr>
<tr>
<td>Assess employee well-being.</td>
<td>Evaluate employee well-being on a consistent basis.</td>
<td>CEO and COO</td>
<td>Every 2 years</td>
</tr>
</tbody>
</table>

### Initiative #2

Employ operational resources to support foundation goals.

<table>
<thead>
<tr>
<th>Priorities</th>
<th>Activities</th>
<th>Owner</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network with organizations doing similar work.</td>
<td>Develop an elevator speech.</td>
<td>Board of Directors</td>
<td>TBD</td>
</tr>
<tr>
<td></td>
<td>Attend conferences/meetings to identify research/work that aligns with LYTE’s mission.</td>
<td>Board of Directors</td>
<td>Yearly</td>
</tr>
<tr>
<td>Foster staff skill set.</td>
<td>Provide trainings focused on topics such as but not limited to breast cancer, cultural humility, and other DEI-centered themes.</td>
<td>Board of Directors</td>
<td>Yearly</td>
</tr>
<tr>
<td>Raise LYTE’s visibility.</td>
<td>Create a brand identity, including branding kit and a marketing/social media plan.</td>
<td>COO</td>
<td>By end of 2024</td>
</tr>
<tr>
<td>Allocate funds for student workers.</td>
<td>Include in grant applications the paid role of student staff.</td>
<td>Grant writers</td>
<td>Every grant application</td>
</tr>
<tr>
<td></td>
<td>Ensure staff are paid equitably.</td>
<td>CEO and CFO</td>
<td>TBD</td>
</tr>
</tbody>
</table>

### Implementation Suggestions

(adapted from First Nation Financial Management Board’s Strategic Planning Process)

The strategic plan is a central location to articulate LYTE’s shared vision, mission, and values but useful as a tool to show success. Implementation of the activities is important in that it can help guide LYTE’s future.

Ways to do this include:
- Board of Directors and C-Suite having a copy of the strategic plan at all times;
- Board of Directors to reviewing the strategic plan at the beginning of each quarterly meeting;
- Management team reviewing strategic plan activities at each meeting;
- Staff reviewing strategic plan at least once annually; and
- Using the strategic plan to set annual goals and allocate financial resources.
Determination of Performance Indicators and Targets
The CEO, COO, and CFO will meet consistently to determine if the initiatives are being met. The CEO will schedule specific Strategic Planning meetings to discuss what has occurred and how to move forward with each priority. At the yearly Board of Directors meeting, the CEO will present how each initiative has been achieved.

A new strategic plan will be developed two years from the adoption of this strategic plan.
Appendix I: Sample Agendas

**Strategic Planning Board Meeting Agenda**

I. Call to Order

II. Opening Business (10 mins)
   a. Approval of last meeting’s minutes
   b. Follow-up on committee reports (disseminated previously)

III. Discussion of Values Inherent to LYTE (45 mins)
   a. Build relationships between C-suite members and employees.
   b. Keep employee work sustainable.
   c. Respect boundaries.

IV. Next meeting’s discussion (5 mins)
   a. Initiative #1 - Establish a consistent management system for all stakeholders, from Board of Directors to volunteers.

V. Adjourn

**Strategic Planning Executive Committee Meeting Agenda**

I. Updates on areas
   a. CEO
   b. COO
   c. CFO

II. Discussion of Values Priority #1: Build relationships between C-Suite members and employees.
   a. Establish consistent meetings between C-Suite members and employees.
   b. Host in-person get-togethers.