



From ‘Dysfunction’ to Direction: Organizational Health Assessment

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If you're clear your credit union has an unhealthy workplace and want to improve it, I recommend doing some diagnostic work on the following five factors: **culture, employee engagement, organizational structure, leadership, and training**. Then treat what you find.

IS YOUR CULTURE THE PROBLEM?

An unclear or fragmented culture is when team members aren't aligned with the mission.

Key Questions to Consider

- ☐ How often do we receive employee feedback, and how do we act on it?
- ☐ What are the common themes in exit interviews or turnover rates in our organization?
- ☐ What changes have we noticed in employee morale or energy levels, especially in response to organizational changes?
- ☐ How do we ensure that employees feel recognized and valued for their contributions?
- ☐ How often do we have conversations with employees about their career development and growth opportunities?

IS YOUR ORGANIZATIONAL STRUCTURE AN IMPEDIMENT?

Organizational structure is way more than which person is in which box on the org chart. To be strategic about structure, you need to think about your credit union's goals and make sure that the **organization is structured to support achieving those goals**.

Key Questions to Consider

- ☐ Are we experiencing any gaps in service delivery or member satisfaction due to how our teams are organized?
- ☐ Are our roles and responsibilities clearly defined, and do employees understand their contributions to the organization's goals?
- ☐ Do we have the right people in the right roles, and are they empowered to make decisions within their scope?

Five Factors of a Healthy Organization

Culture

Employee Engagement

Organizational Structure

Leadership

Training

Every credit union that improves in one or more of these five areas will be on course to being stronger and better able to deliver on its mission and strategy.

DOES THE PROBLEM LIE WITH LEADERSHIP?

Leaders often wear many hats, especially at smaller organizations. This can lead them to spend more time on operations than strategy. Having leaders not working at the intended level can lead to an unhealthy organization.

Key Questions to Consider

- ☐ How much time do leaders spend on high-level strategic planning versus managing day-to-day operations?
- ☐ How often do leaders have conversations with the team about long-term goals versus immediate challenges?
- ☐ Do leaders regularly take time off, and fully delegate during that period?

ARE YOU ASSUMING TRAINING WILL RESTORE YOUR ORGANIZATION'S HEALTH?

A training need *can* be a key factor in a lack of organizational health. But it's important to determine that it's actually the factor in play before spending time and money on it.

Key Questions to Consider

- ☐ Are employees equipped to handle member needs and challenges related to new tools, processes, or products?
- ☐ Are there performance or member satisfaction gaps that indicate a lack of knowledge or proficiency?
- ☐ Do employees feel prepared and confident to meet the demands of new technology, systems, and member expectations?

Whether you tackle the challenges of your organization's health on your own or [engage an expert to help](#), this work is doable now and also sustainable over time. Be one of those credit unions with a healthy workplace, and you'll put yourself on track to have happier employees and members, deliver on your strategy, and be poised for sustainable growth.

Carolyn Reeves, MS, SPHR, ACC, CUDE, is a workplace consultant and leadership coach who partners with credit union leaders to build high-performing teams and positive cultures. With over 20 years of talent development experience—including 16 years in a senior position at a \$30 billion credit union—she provides practical, real-world guidance, always focused on what drives lasting success: people.