



# **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?

### 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?

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## Five Factors of a Healthy Organization

Culture

Employee Engagement

Organizational Structure

Leadership

Training

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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.

## IS YOUR ORGANIZATIONAL STRUCTURE AN IMPEDIMENT?

### 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?

## DOES THE PROBLEM LIE WITH LEADERSHIP?

### 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?

### 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.*