

Taking the Pulse of Your Organization: Maybe It's Time for an Organizational Health Check-up

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Introduction

This is the eighth, and last, in a series of articles that have appeared in the OHPE Bulletin over the last two years, written by Peter O'Donnell of Innovaction [pcod@innovaction.com]. In the first article in the series, Peter introduced a five-level developmental model of organizational health. Subsequent articles expanded on the initial overview, and elaborated each of the levels.

The previous articles appeared in OHPE issues 51.1 (4/24/98), 73.1 (9/25/98), 84.2 - which can be found in the OHPE database as 104.1 (12/11/98), 92.1 (02/12/99), 99.1 (04/01/99), 107.1 (5/28/99) and 182.1 (11/10/00).

A. There's Some Nasty Bugs Going Around

Wouldn't it be great if there was an organizational equivalent of the 'flu shot', that would protect our organizations from the common forms of malaise that befall them. Let's face it -- there seem to be a host of 'bugs' going around these days that are claiming far too many victims.

What's worse is that many of these seem to take years to develop but, by the time we detect an 'outbreak', it's too late to prevent a full-scale epidemic, and its potentially devastating consequences for a once-healthy organization and its often unsuspecting staff members. Isn't there something we can do to identify and spot the early warning signs of these common 'spirit killers', and take steps to avoid or lessen their damaging effects?

Well, to continue the analogy, maybe it's time to start having regular organizational health check-ups. Imagine the potential benefit of taking time regularly to take the pulse of your organization -- to perform a variety of 'tests' to assess your health on a variety of essential components of organizational capacity and fitness. Better yet -- imagine being able to diagnose the root causes of your organization's most debilitating maladies, and then taking steps to restore your 'patient' to health. And, ideally, it would be even more exciting if such a check-up would enable you to prevent the onset of the most damaging of the afflictions that infect so many of our organizations.

Just to get yourself into the mood for this task, perhaps you could take a few minutes to sit back and reflect on some of the 'maladies' afflicting -- or threatening -- your organization's health and performance.

- What are some of the symptoms that tell you there's a problem?
- What complaints do you hear most frequently?
- How might you categorize and cluster these symptoms?
- Do you have a name for the 'condition' (e.g., management/staff communication channel stenosis - a blockage that restricts the flow of information?)
- What do think is causing it, and what are its consequences?
- Are you aware of any proven treatments, and what would it take to implement them in your setting?

- What can be done to prevent the condition from worsening...or even from occurring in the first place?

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B. Diagnosis and Treatment

Over the past few years, during the time we've been writing these articles, my colleagues and I have been working to develop a practical 'diagnostic' process, which could facilitate effective treatment and, ultimately, prevention. The results of our ongoing efforts have been heartening, judging by the experiences of some of the 'test patients' that have tried out some of the simple tools and procedures we have developed. Through their creative application of these resources, we've learned a lot about how organizations can not only obtain useful feedback on their current state of organizational health, but also begin the process of restoration and even prevention. The most important factor in this organizational health 'breakthrough' is really no surprise at all -- it's certainly been a theme in most of the articles in the series:

More and better communication

- *increases awareness of current reality,
- *surfaces deeply rooted causal factors,
- *makes key threats to organizational health discussible,
- *and sets in motion a natural process of healing and health promotion.

We had clear confirmation of this key determinant early in our work in this area. In the research phase that led to the second article in the series, co-authored by Penny Paucha, we discovered that the interviews Penny was conducting with a wide variety of volunteers were doing more than simply helping us to identify key indicators of organizational health. They were also raising people's awareness of what was important to them, and challenging them to find ways to make these issues discussible in their own settings. We also realized that we needed to avoid developing checklist-type 'inventories' and sterile data analysis and feedback mechanisms for assessing organizational health, because these would eliminate a key dynamic in the process -- talking.

As a result, we have focused our attention on creating a list of discussion starter questions. These questions, listed below, can be 'rated' using a simple scale, but are meant to function primarily as a way of 'priming the pump' for dialogue regarding fundamental issues that rarely get discussed in most of our organizations.

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C. Listening and Learning Your Way Toward Health

We then designed a full-day workshop as one means of focusing people's attention on such a dialogue, and made it a 'leaders only' invitational event. This has proven to be a quite successful means of introducing key decision-makers to the issues -- and the need for dialogue. But what has been a somewhat unanticipated benefit of doing these workshops, including a shorter version that can be tied into other training events, has been to see how the participants have gone beyond our process to make the 'check-up' a part of their organization's culture and core learning process.

One of the first innovations, for example, was in how several of the Executive Directors took the time to distribute a pre-workshop survey to their staff in order to have more raw material to inform their participation. Others went away from the workshop with plans to share what they had

learned in 'brown bag' lunch presentations in their workplace, and in other settings. They understood the importance of engaging more people in the diagnosis - and, more importantly, the dialogue - to promote ownership and participation in the organizational health promotion process.

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D. Questions to Seed the Dialogue

The following questions, listed by 'level' in our developmental model, are adapted from the pre-workshop 'Organizational Check-up Questionnaire' we distribute to workshop participants. That instrument uses a simple seven-point rating scale to produce a 'score' for each level of the model. But, as indicated above, the score doesn't matter as much as the process of building awareness and, most important of all, engaging in dialogue with a view to surfacing the issues, and jointly seeking solutions.

*Providing Supportive Workplace Conditions...to build trust

1. In our organization, do people feel they matter as people, beyond their job performance?
2. In our organization, are accommodations made for life outside of work? For example, if an employee's child is sick, can they work at home or use flex hours?
3. Is open two-way communication between employees and supervisors the norm in our organization?
4. To what extent does 'Give 'em an inch and they'll take a mile' describe how employees are viewed -- or treated -- in our organization?

*Creating a Climate for Change...to promote engagement

1. Do people feel that they have access to adequate, timely information about what is happening in our organization?
2. Does our organization support ongoing opportunities for employees to improve their capabilities and their readiness for the future?
3. Does our organization's structure and policies support effective decision-making and follow-up action at all levels, throughout the organization?
4. Is there a clearly defined mechanism for involving employees in shaping the future of our organization?

*Building a Culture of Shared Accountability...to create ownership

1. Do employees have the means necessary to take action when they identify a problem within our organization?
2. Are creative thinking and responsiveness to change fostered at all levels, throughout our organization?

3. Do employees take pride in the way their work contributes to achieving the overall vision of our organization?

4. Would employees characterize this organization as one that 'truly believes in its people and shows it'?

*Enhancing Capacity for Learning...to enable growth
(These questions are based on definitions provided in the article on this level, entitled Enhancing Capacity for Learning.)

1. Do we work together effectively in our organization to identify and overcome the 'Challenges of Initiating Change' as outlined in the article?

2. Do we work together effectively to identify and overcome the 'Challenges of Sustaining Momentum' as outlined in the article?

3. Do we work together effectively to identify and overcome the 'Challenges of System-wide Redesign and Rethinking' as outlined in the article?

4. Are we genuinely committed to building learning into everything we do, and to support people in developing their personal and organizational learning capabilities?

*Nurturing Learning Communities...to achieve sustainability

1. Does our organization support people's participation in internal and external learning communities where learning -- not tasks -- is the focus?

2. Is our organization characterized by ongoing collective learning throughout, and do we provide adequate recognition of this learning, and its benefits?

3. Do we encourage people to find opportunities to extend the benefits of our own learning to others, both within and outside our organization?

4. Does our organization consider 'system wide' learning a priority, as shown by having a strategy to achieve this, and making a genuine investment in implementing it?

E. Growing Toward Health...Together

Feel free to experiment with when, where and how you use these questions, and let us know what works for you, and how the process is helping your organization. Distribute the articles in this series to everyone who participates, to deepen their understanding of the key determinants of health at each level of our model. Take time to reflect on the content, and lessons, of these dialogues. What are you learning about your organization? Where are you healthy, and how can you maintain these areas? Where are you not, and how can you 'treat' these conditions at the root cause level and restore yourself to health? Where are you vulnerable to 'infection', and what can you do to prevent future problems in these areas?

Most of all listen, learn and grow toward health... together.

