



# **Collective View Report: Organizational Health Index -Equity**

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## Introduction

nRhythm is proud to be a partner with you on this journey to create a more equitable and healthy organization. The following report provides insight into both a personal and collective view of your organization. The Index is only a tool - The most impactful part of this process will be the conversations. The relationships and conversations that emerge from this process are the foundation to increasing long term health and equity of your organization. Use this opportunity to listen, ask meaningful questions, and design the future you want together. Changing your individual and collective participation has the opportunity to improve organizational health and equity and ensure that your organization is actively reversing historic societal inequities and regenerating people and communities.

## Index Design

The Organizational Health Index - Equity (OHI-Equity) measures the equity and health of an organization's operating design, ecosystem, and receptivity to change.

**Methodology.** OHI evaluates the fundamental health and equity of an organization's operating environment. It is based upon a living systems and institutional equity approach which suggests that addressing complex environments need a fundamentally different design and structure. Each team member answers eighty questions in eight categories. Category descriptions can be found in Appendix A.

1. **Organizational Design (OD).** These are the primary operating structures of the organization providing the necessary pillars for implementation. Organizational Context (The Why?), Organizational Structures (Enabling Organizational Health and Equity and Operational Execution) and Organizational Work (Strategies and Activities).
2. **Organizational Ecosystem (OE).** Insights derived from living systems, these foundational processes are core for a healthy functioning organizational environment. The fundamental belief is that organizations must create the conditions for individuals to thrive. Abundance and resilience emerge as a by-product of the system. These active processes are Energy Flow (Thriving Members), Informational Cycle (Intelligent, Equitable Decision-Making), Communication Cycle (Relevant and Equitable Exchange) and Network Connections (Diverse Supportive Community).
3. **Organizational Receptivity (OR).** Whether an organization's current structure and operating environment enables receptivity or not. The less receptive an organization, the more likely it becomes extractive in policy and practice. An organization's receptivity boosts or undermines the existing health of the organization.

<b>Organizational Health Index:</b>
<b>0-2.5 Degenerative (Creating Inequity) 2.6-3.75 Transactional (Maintaining the Status Quo )</b> <b>3.76-5 Regenerative (Reversing Historic Inequities)</b>
<b>Organization Health Index</b>
<b>Organizational Design. Operating Framework</b>
<b>Organizational Context:</b> Shared Purpose and Behaviors.
<b>Organizational Structures:</b> Foundational Operating Structures.
<b>Organizational Work:</b> Strategies and Activities.
<b>Organizational Ecosystem. Operating Health</b>
<b>Energy Flow:</b> Thriving Team Members.
<b>Informational Cycle:</b> Intelligent, Equitable Decision-Making.
<b>Network Connections:</b> Diverse Partner Community.
<b>Communication Cycle:</b> Relevant, Equitable Exchange of Intelligence.
<b>Organizational Receptivity. Processing Intelligence</b>
<b>Trending OHI</b>

## Assessment Scale

### ***Degenerative (Creating Inequity)*** **(0 - 2.5)**

Current Structures to foster equity in decision making, power, and resource are undefined and **inadequate** to develop a healthy environment where members thrive, decision-making is both active and distributed, communication is cycling relevant information, and partnerships are diverse and abundant. As a result, Organizational Health and Equity of the organization is declining and the organization is continuing to contribute to historic societal inequities.

### ***Transactional (Maintaining the status quo)*** (2.6 - 3.75)

Structures to foster equity in decision-making, power, and resources are defined, but are **transactional in nature** and inconsistent in creating an environment where members thrive, decision-making is both active and distributed, communication is cycling relevant information and partnerships are diverse and abundant. As a result, Organizational Health and Equity of the organization is static and siloed and the organization is maintaining the status quo of historic societal inequities.

### ***Regenerative (Reversing Historic Inequities)*** (3.76 - 5.0)

All members of the organization are **actively designing and evolving** structures that create an environment to foster equity in decision-making, power, and resources. Members thrive, decision-making is both active and distributed, communication is cycling relevant information and partnerships are diverse and abundant. As a result, the Organizational Health and Equity of the organization is regenerating. The organization is actively reversing historic societal inequities and regenerating people and communities.

## Facilitation Guidelines

We believe that organizations are *Living Systems* that require a different design and management process for achieving collective success. The OHI will provide insight into the underlying health of the organization as well as the effectiveness of the current structures, strategies, and activities.

The assessment is a snapshot in time. There is nothing sacred about the numbers or colors. It is just a starting point for a conversation that could be transformative within the organization. There is a tendency to focus on the lowest numbers or what is in “red” or “yellow,” but we encourage you to participate fully in the process of “seeking to understand.” Ask questions to better understand yourself while seeking to understand your colleagues.

We invite you to you consider the questions in each section of the report as a guide while deeply thinking about what is happening in the organization. This will provide a framework for assessing how to move forward together.

## Collective Assessments

The Collective Assessments reflect the combined insights from all of the organization’s team members. Since this is only a snapshot in time, use this as the impetus to ask great questions. Understanding is the beginning of change. If you need a refresher on the meaning of each section, please see Appendix A. Consider the following questions in reviewing Collective Assessments:

1. Review the entire report before focusing on any one section. It is important that you see everything first.
2. Review each section and identify any questions or concerns.
  - a. Are there any sections that matter the most to you? Why?
  - b. What insights emerge for you?
  - c. Does this information confirm or conflict with your view of the organization?
3. Identify questions that you would like to explore with the team. Consider questions that have the greatest potential for impact if addressed.

## Summary Report

The following report is an overview of each of the core sections of the OHI Assessment. In the reports that follow this one, we have included more details.

<b>Organizational Health Index:</b>	<b>Sept-19</b>
<b>0-2.5 Degenerative (Creating Inequity) 2.6-3.75 Transactional (Maintaining the Status Quo) 3.76-5 Regenerative (Reversing Historic Inequities)</b>	
<b>Organizational Health Index</b>	<b>3.03</b>
<b>Organizational Design. Operating Framework</b>	
<b>Organizational Context:</b> Shared Purpose and Behaviors.	<b>3.21</b>
<b>Organizational Structures:</b> Foundational Operating Structures.	<b>2.42</b>
<b>Organizational Work:</b> Strategies and Activities.	<b>3.38</b>
<b>Organizational Ecosystem. Operating Health</b>	
<b>Energy Flow:</b> Thriving Team Members.	<b>3.46</b>
<b>Informational Cycle:</b> Intelligent, Equitable Decision-Making.	<b>3.13</b>
<b>Network Connections:</b> Diverse Partner Community.	<b>3.00</b>
<b>Communication Cycle :</b> Relevant, Equitable Exchange of Intelligence.	<b>2.67</b>
<b>Organizational Receptivity. Processing Intelligence</b>	
<b>Trending OHI</b>	<b>3.03</b>

## Detailed Summary Report

The following report includes four questions in each category of the OHI to create visibility around areas of alignment and tension. The percentage at the end of the questions represents the number of team members that answered in the positive.

### Detailed Summary Report: Part 1

<b>Organizational Health Index:</b>	
0-2.5 Degenerative (Creating Inequity) 2.6-3.75 Transactional ( <i>Maintaining the Status Quo</i> ) 3.76-5 Regenerative ( <i>Reversing Historic Inequities</i> )	
<b>Organizational Health Index</b>	<b>3.03</b>
<b>Organizational Design. Operating Framework.</b>	<b>3.00</b>
<b>Organizational Context: Shared Purpose and Behaviors.</b>	<b>3.21</b>
Has the organization defined and published a statement of purpose?	<b>83%</b>
Is there alignment between the stated purpose of the organization and your purpose?	<b>83%</b>
Is equity adequately defined and reflected in the organization's stated purpose?	<b>50%</b>
Does the organization demonstrate itself as an equitable organization?	<b>25%</b>
<b>Organizational Structures: Foundational Operating Structures.</b>	<b>2.42</b>
Is the organization committed to changing or evolving non-effective operating structures?	<b>67%</b>
Are the operating structures fully transparent?	<b>67%</b>
Do the current structures address power inequities within the organization?	<b>33%</b>
Do current operating structures consider historic societal inequities?	<b>33%</b>
<b>Organizational Work: Strategies and Activities.</b>	<b>3.38</b>
Do I understand how to participate in the organization's programs?	<b>92%</b>
Do I participate in the creation of the organization's programs?	<b>83%</b>
Do team members identify leading indicators for tracking trends on goals?	<b>50%</b>
Does the organization have adequate funding to implement meaningful programs?	<b>42%</b>

## Detailed Summary Report: Part 2

<b>Organizational Ecosystem. Operating Health.</b>	<b>3.06</b>
<b>Energy Flow: Thriving Team Members.</b>	<b>3.46</b>
Do you believe your unique value is a benefit to the organization?	100%
Do you believe your viability impacts the organization's activities?	92%
Does the organization value the diversity of its team members?	42%
There is little risk of other team members of the organization negatively impacting you?	42%
<b>Informational Cycle: Intelligent, Equitable Decision-Making.</b>	<b>3.13</b>
Is the organization open to continuous improvement?	92%
Are team members receptive to new ideas to improve the organization?	83%
Has the organization adequately addressed vested self-interests from team members?	33%
Does the organization make decisions quickly enough?	25%
<b>Network Connections: Diverse Partner Community.</b>	<b>3.00</b>
Does the organization have an actively growing external partner community?	100%
Does the organization build capacity in the communities it serves?	92%
Does the organization adequately represent the communities they are serving?	25%
There is little risk of external partners negatively impacting your organization?	25%
<b>Communication Cycle: Relevant, Equitable Exchange of Intelligence.</b>	<b>2.67</b>
As a team member, do you have access to information when needed?	83%
Are team members timely in responding to requests?	75%
Are all team members transparent with one another?	25%
Does the organization respond quickly enough when structures are not working?	25%

## Detailed Summary Report: Part 3

<b>Organizational Receptivity. Processing Intelligence.</b>	<b>3.04</b>
Is the organization receptive to feedback from the communities it serves?	92%
Do you consider yourself as a representative of the organization externally?	92%
Does the community believe that the organization is a leader?	33%
Is the organization diverse enough to embrace new ideas from the communities it serves?	17%



## Detailed Questions Report

The following report includes a detailed overview of all of the questions in the OHI Assessment. The percentage at the end of the questions represents the number of organizations that answered in the positive.

### Detailed Questions Report: Part 1

<b>Organizational Health Index:</b>	
<b>0-2.5 Degenerative (Creating Inequity) 2.6-3.75 Transactional (Maintaining the Status Quo ) 3.76-5 Regenerative (Reversing Historic Inequities)</b>	
<b>Organizational Health Index</b>	<b>3.03</b>
<b>Organizational Design. Operating Framework.</b>	
<b>Organizational Context: Shared Purpose and Behaviors.</b>	<b>3.21</b>
Has the organization defined and published a statement of purpose?	83%
Do you agree on how the organization will achieve its purpose?	50%
Do you believe the stated purpose of the organization is meaningful?	75%
Has the organization defined the needed behaviors for collaboration between all of its team members?	75%
Is equity adequately defined and reflected in the organization's stated purpose?	50%
Does the organization demonstrate itself as an equitable organization?	25%
Do team members participate in the development and review of the organization's stated purpose?	67%
Do new team members participate in any onboarding related to the stated purpose and behaviors of the organization?	67%
Is there alignment between the stated purpose of the organization and your purpose?	83%
Are team members willing and able to evolve to benefit the stated purpose of the organization?	67%
<b>Organizational Structures: Foundational Operating Structures.</b>	<b>2.42</b>
Are roles and responsibilities clearly defined within the organization?	58%
Do you believe there are adequate structures for decision-making within the organization?	33%
Do the current structures address power inequities within the organization?	33%
Is the organization committed to changing or evolving non-effective operating structures?	67%
Do the operating structures ensure diversity in the organization?	42%
Do current operating structures consider historic societal inequities?	33%
Are client voices adequately represented in decision-making structures of the organization?	42%
Are the operating structures fully transparent?	67%
Are the operating structures sufficient to ensure shared member accountability within the organization?	58%
Does the organization disrupt the structural inequities in access to funding and resources in the industries it serves?	50%

<b>Organizational Work: Strategies and Activities.</b>	<b>3.38</b>
Do I understand how to participate in the organization's programs?	92%
Do I participate in the creation of the organization's programs?	83%
Do I participate in the evaluation of the organization's programs?	75%
Does the organization evaluate the effectiveness of existing strategies?	50%
Does the organization have adequate funding to implement meaningful programs?	42%
Are the current programs in alignment with the stated purpose of the organization?	83%
Do team members demonstrate a willingness to go beyond their expected role?	67%
Do team members take responsibility for outcomes?	58%
Do team members hold one another accountable?	75%
Do team members identify leading indicators for tracking trends on goals?	50%

### Detailed Questions Report: Part 2

<b>Organizational Ecosystem. Operating Health.</b>	<b>3.06</b>
<b>Energy Flow: Thriving Team Members.</b>	<b>3.46</b>
Does the viability of team members matter to the organization?	75%
Are there adequate programs within the organization to enhance the viability of team members?	50%
Do you believe your viability impacts the organization's activities?	92%
Are you receiving adequate benefit from being a member of the organization?	58%
When deadlines are tight, and goals must be met, do you believe your well-being is still a priority to the organization?	58%
Can you articulate to other team members your unique value to the organization?	83%
Do you believe your unique value is a benefit to the organization?	100%
Is the organization actively investing in your personal development?	92%
Does the organization value the diversity of its team members?	42%
There is little risk of other team members of the organization negatively impacting you?	42%
<b>Informational Cycle: Intelligent, Equitable Decision-Making.</b>	<b>3.13</b>
Do you consider yourself a decision-maker in the organization?	58%
Does the organization make decisions quickly enough?	25%
Do you consider yourself a decision-maker within the organization?	58%
Are team members actively encouraged to innovate or think "outside of the box"?	75%
Are team members receptive to new ideas to improve the organization?	83%
Is your organization receptive to constructive feedback from team members?	75%
Is the organization open to continuous improvement?	92%
Have you seen meaningful improvements within the organization over the last 12 months?	75%
Has the organization adequately addressed vested self-interests from team members?	33%
Does the organization invest time in evaluating or learning from previous activities?	50%

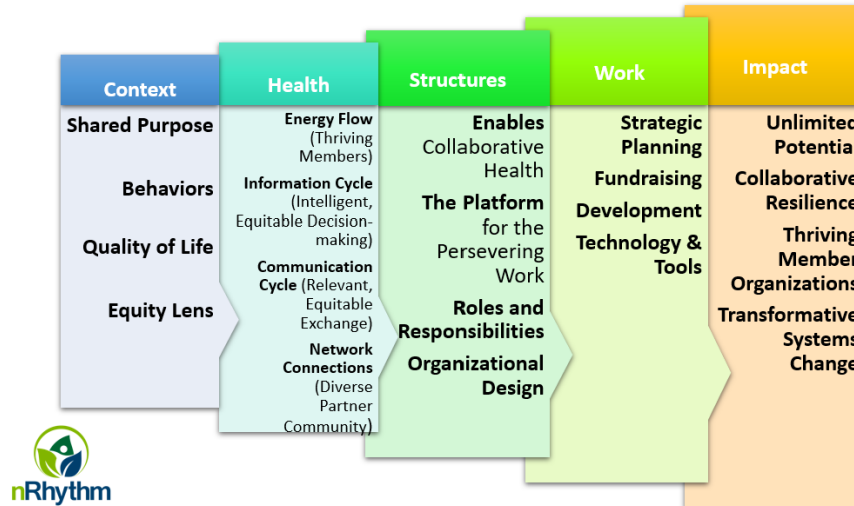
<b>Network Connections: Diverse Partner Community.</b>	<b>3.00</b>
Does the organization adequately represent the communities they are serving?	25%
Does the organization actively influence key decision-makers? (policy-makers, local government, anchor institutions, etc.)	33%
There is little risk of external partners negatively impacting your organization?	25%
Does the organization have an actively growing external partner community?	100%
Are external partners adequately integrated into relevant conversations that happen within the organization?	50%
Does the organization invest enough resources into developing external partnerships?	75%
Does the organization build capacity in the communities it serves?	92%
Are external partners aligned with the organization's stated purpose?	83%
Do external partners actively participate in the evaluation of the organization's activities?	50%
Do you actively build partnerships for the organization?	67%
<b>Communication Cycle: Relevant, Equitable Exchange of Intelligence.</b>	<b>2.57</b>
Is there active exchange or collaboration with all team members?	50%
Are team members timely in responding to requests?	75%
As a team member, do you have access to information when needed?	83%
Are all team members informed when important decisions are made within the organization?	50%
Do you feel adequately informed to contribute to the organization?	75%
Are all team members transparent with one another?	25%
There is no active subversion of the organization's activities by team members?	42%
Are the communication structures within the organization decentralized?	58%
Does the organization adequately invest in tools to support better collaboration amongst team members?	50%
Does the organization respond quickly enough when structures are not working?	25%

### Detailed Questions Report: Part 3

<b>Organizational Receptivity. Processing Intelligence.</b>	<b>3.04</b>
Can the organization change or embrace new ideas quickly enough?	50%
Would you consider the organization to be flexible in making important decisions?	58%
Is the organization receptive to feedback from the communities it serves?	92%
Does the organization incorporate feedback from the communities it serves into its decision-making?	83%
Do you consider the organization a leader in the community?	33%
Does the community believe that the organization is a leader?	33%
Is the organization diverse enough to embrace new ideas from the communities it serves?	17%
Does the organization have open and authentic communication between its team members?	67%
Have you seen any meaningful changes in structures or process since you joined the team?	83%
Do you consider yourself as a representative of the organization externally?	92%

## Appendix A. Regenerative Framework Descriptions

### The Regenerative Framework



#### Organizational Design: Context

The Organizational Context provides a shared purpose for all decision-making. In an equitable organization, a commitment to operating through an equity lens is expressed in its context. The purpose must be clear, reflect the communities and clients served, and be co-owned by all team members and the communities being served. The Organizational Context should also include agreements on equitable behaviors for engagement between team members and between the organization and the communities it serves.

#### Organizational Health: Energy Flow

Energy Flow is the energy created and transferred between team members. We monitor the health and viability of each team member and their interactions to better understand equity across the organization. In an equitable organization, all individuals are valued and engaged, and energy flow is created. To increase the equity and energy flow within the organization, the structural design should incorporate each team member's unique value and contribution.

#### Organizational Health: Informational Cycle

In an equitable and healthy organization, all members have the information and resources they need to be intelligent decision-makers. Decisions need to be informed, relevant, and a reflection of a commitment to equity and the shared purpose of the organization. Equitable, healthy organizations are receptive to new ideas and thinking by learning from previous decisions and historic inequities in the organization and the communities being served. The insights, wisdom, and intelligence from the past become the learnings that give birth to new insights, wisdom, and intelligence for the future.

### **Organizational Health: Network Connections**

Network Connections are the relationships that the organization has with external partners and stakeholders. This includes clients, the communities served, advisors, vendors, contractors, and strategic alliances. In an equitable organization, there is a direct correlation between the health and equity of the organization and the strength and diversity of its network partners. The more diverse and valued the voices, experiences, and background of all members of its network, the more equitable, resilient, and productive the organization will be. In an organization, the mutualism, diversity of connections, and transparency that exist within the network of partners will enable an equitable operating environment to thrive.

### **Organizational Health: Communication Cycle**

Core to the equity and health of any organization is the delivery and exchange of intelligence and wisdom to all its team members. One of the activities within organizations that results in inequities is team members not having access to meaningful information across the organization. Information is power and siloed decision-making reduces the equity and long-term health of the organization. Healthy, equitable organizations have open, transparent flow of information that is actively and equitably exchanged with team members.

### **Organizational Design: Structures**

The Organizational Structures should be designed to enhance or strengthen the equity and intrinsic health (Energy Flow, Informational Cycle, Communication Cycle, and Network Connections) of the organization. Furthermore, an equitable and healthy organization actively recognizes power differentials and designs structures to disrupt the historic inequities within its industry and community. Here are a few examples of operating structures: 1) Roles and Responsibilities, 2) Governance, 3) Meetings, 4) Monitoring and Evaluation. However, all structures must adapt and evolve with the current operating conditions to maintain relevance.

### **Organizational Design: Work**

Organizational Work is about the design and implementation of the vision and goals in the organization. This involves agreeing upon and prioritizing the primary strategies and/or activities to create the most impact. In an equitable and healthy organization, all activities are being achieved in-line with its commitment to equity and do not compromise the health of its' team members and the communities being served

### **Organizational Receptivity**

To maintain relevance, equity, and long-term health, an organization must be both receptive and responsive to new ideas and strategies.