

Organizational Health – Consolidated – Theories, Frameworks, Indicators and Strategies

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There are numerous articles on organizational health. This article attempts to give a brief and consolidated idea of what is organizational health, how it came into being, its associated theories, frameworks, indicators, benefits, and strategies to improve it.

Keywords: Organizational health, Financial Indicators, Non-Financial Indicators, Strategies.

1. Introduction

Organizational health is still one of the best indicators of an organization, its performance and its overall effectiveness. There are many review articles about organizational health. This paper tries a novel approach of trying to consolidate all the necessary facets of organizational health into a single brief article, which can serve as a quick reference for the readers to understand and build upon.

Organisational health refers to the capacity of an organisation to operate efficiently, adapt to change effectively, and foster internal growth, through the assessment of the working environment based on various factors such as management practises, performance management, workplace safety, treatment of individuals, motivation through compensation, emphasis on quality, and focus on customer satisfaction.

2. Research Methodology:

Review of literature done using secondary data from eBooks, databases, journals and blogs.

3. History

The concept of organizational health was initially introduced by Argyris in the 1950s, with

roots tracing back to the 1960s when behavioral scientists and human relations experts sought answers to effective worker treatment (Yücel et al., 2013). The notion of Organisational health was first introduced in the early 20th century through Elton Mayo's Hawthorne experiments conducted at the Western Electric Company in Chicago. These experiments revealed that psychological needs had a greater impact on outcomes compared to physical needs. According to Peter Drucker in the 1980s, organisations that prioritise their employees and cultivate a favourable work atmosphere were considered to be healthy.

Miles (1969) defined a healthy organization as one that not only endures but also grows, improves its coping mechanisms, and demonstrates organizational efficiency. Strategically, organizational health (OH) is characterized by a set of enduring second-order system properties that transcend short-term effectiveness (Bennis, 1962; Miles, 1969). A healthy organization not only survives but also thrives in its environment, continuously enhancing its resilience and problem-solving capabilities. Organisational Health refers to an organization's capacity to effectively handle adverse events, both internal and external, while also being able to quickly seize opportunities. This ensures that the organisation remains focused on its goals and does not experience persistent dissatisfaction among stakeholders. Warren Bennis (1962), was among the early proponents of the concept of organisational health. He observed that conventional methods of assessing organisational effectiveness were insufficient in capturing a more comprehensive understanding of organisational health. He wanted to find a balance between measuring the performance of an organisation and considering the health and well-being of individuals and the group as a whole. When Bennis applied mental health principles to organisational contexts, he identified three dimensions of organisational health: adaptability, coherence of identity, and accurate perception of the world. The field of organisational health was still in the early stages of development, as there was no clear definition for it yet. This phase is referred to as the preparadigmatic phase by Parkhe (1993) (Kinnunen, Feldt. et al, 2000). Organizational health improves goal achievement, fosters effective communication, and advances organizational growth and development (Hoy & Feldman, 1987).

A significant portion of the research conducted in this field begins with the premise that achieving a balance between organisational performance metrics and individual health is necessary to develop a combined concept of organisational health. Cooper and Williams (1994) and Newell (1995), confer that the connection between individual and organisational health is frequently depicted as mutually beneficial, but there is limited understanding of this relationship. The concept that the well-being of organisations and individuals are connected, as proposed by Pritchard et al., (1990), in systems theory provides valuable perspectives. The concept of health encompasses various aspects, including anatomical, physiological, mental, and social dimensions. However, it is important to note that health is significantly influenced by cultural factors. This signified a shift towards adopting a process-oriented perspective on health. The generative dimension of health and well-being can only be achieved when we focus on addressing pathologies in our everyday interactions. This means we have to consider how we engage with each other and designing health initiatives rather than solely focusing on disease prevention.

According to McHugh and Brotherton (2000), the existing models of healthy organisations do not adequately emphasise the interconnectedness between financial performance,

management processes, functions, and behaviours. Organizational culture is another critical factor influencing health. A positive and supportive culture can significantly impact employee satisfaction, engagement, and productivity (Deal & Kennedy, 2000). According to Browne (2002), a significant validation study was conducted on the Healthy Work Organisation Model. The study found that management practises have the potential to prevent work-related stress and enhance organisational effectiveness. By fostering a strong organizational culture, leaders can create a sense of belonging and purpose among employees. Employee well-being is inextricably linked to organizational health. A healthy workforce is more productive, innovative, and resilient. Organizations that prioritize employee well-being often see improved performance and reduced turnover (Saks, 2006). With many studies being conducted on the topic of Leadership and Culture in relation to Organisational Health, many researchers, including Lencioni (2002), propose that healthy organisations exhibit certain characteristics, which encompass minimal levels of politics and confusion, elevated levels of morale and productivity, and well-defined and cohesive strategies. (Bruce, K., et al, 2011) Key elements of organizational health include morale, resource support, constructiveness, academic attention, institutional oneness (integrity), and morale (Hoy and Miskell, 2008).

McKinsey's OHI framework categorizes organizational health into three clusters: internal alignment, quality of execution, and capacity for renewal, further divided into nine dimensions and 37 practice indicators (Keller & Price, 2011). Organizational health encompasses all aspects of an organization's capacity to carry out its duties in a manner that promotes advancement, enhancement, and expansion. A healthy organization is one where people desire to work, remain, and contribute positively (Heidarie et al., 2012).

Although, historically, organizational health was primarily linked to employee well-being and morale (Bennis, 1962), the modern understanding of organizational health is far more comprehensive.

A healthy organization is characterized by its ability to adapt to change, foster a positive work environment, and achieve sustainable performance. Strong leadership plays a pivotal role in shaping organizational health. Effective leaders inspire and motivate employees, promote innovation, and make strategic decisions that align with the organization's long-term goals (Northouse, 2018). Empirical research primarily focuses on educational institutions and business organizations, examining the impact of OH on organizational effectiveness, personality, ethical climate, culture, justice, interpersonal performance, and leadership decision-making (Singh & Jha, 2018). To measure organizational Health the Organizational Health Index (OHI) – a comprehensive quantitative diagnostic tool that measures organizational health across multiple dimensions, including leadership, culture, strategy, and operations and helps leaders assess and achieve the necessary health for sustained long-term performance is used (Kruk et al., 2018). It serves as a benchmark for measuring organizational and employee welfare.

4. Theories

While there isn't a singular, overarching theory of organizational health, several theories and

frameworks contribute to our understanding of what makes a healthy organization. Here are some key theories:

1. Systems Theory:

Systems theory is a framework for understanding how complex systems work. It views a system as a group of interconnected elements that interact with each other and their environment. These elements can be anything from individuals to organizations or even entire ecosystems. Concepts in systems theory include interconnectedness, emergence, feedback loops, and open and closed systems. Systems theory is used in various fields, including biology, psychology, sociology, and management, to analyse and understand complex phenomena. It helps in seeing the bigger picture as well as to appreciate how different elements interact to create the whole.

2. Contingency Theory:

Contingency theory posits that there is no one-size-fits-all approach to management. Instead, the most effective leadership style and organizational structure depend on various situational factors. These factors can include the organization's size, industry, technology, and the external environment. For example, a highly structured and bureaucratic approach may be suitable for a large, stable organization, while a more flexible and adaptive approach may be better for a smaller, innovative startup. Contingency theorists emphasize the importance of understanding the specific context and tailoring management practices accordingly. This theory recognizes that effective leadership is not about rigidly adhering to a particular style but rather about adapting to the changing needs of the situation.

3. Organizational Culture Theory:

Organizational culture theory examines the shared values, beliefs, and behaviours that shape an organization's identity and influence its members' actions. It explores how culture is created, maintained, and transformed through various artifacts, values, and assumptions. These elements, such as rituals, symbols, and stories, contribute to the organization's unique character and impact its overall performance. A strong and positive organizational culture can foster employee engagement, motivation, and productivity. By understanding and shaping culture, organizations can align their employees' behaviours with their strategic goals and create a more cohesive and effective workplace.

4. Social Exchange Theory:

Social exchange theory posits that social interactions are essentially exchanges, where individuals weigh the potential rewards and costs of their relationships. People are motivated to maximize rewards and minimize costs, seeking to maintain relationships that offer more benefits than drawbacks. This theory highlights the importance of reciprocity, fairness, and equity in social interactions. When individuals feel that their contributions are not being reciprocated or that they are not receiving fair treatment, they may become dissatisfied and seek to alter or terminate the relationship. By understanding the dynamics of social exchange, we can gain insights into various aspects of human behaviour, including friendship, romantic relationships, and work relationships.

5. Positive Organizational Behaviour (POB):

Positive Organizational Behaviour (POB) focuses on the study and application of positive human resource strengths and psychological capacities to enhance workplace performance. Instead of solely addressing weaknesses, POB emphasizes the development of positive qualities like hope, optimism, resilience, and self-efficacy. By fostering these strengths, organizations can create a more positive and productive work environment. POB recognizes that positive emotions, behaviours, and relationships contribute significantly to employee well-being, job satisfaction, and overall organizational success. By implementing strategies that promote positivity, organizations can improve employee engagement, reduce turnover, and enhance innovation and creativity.

6. Resource dependence theory

Resource dependence theory states that organizations rely on external resources to function and grow. These resources, such as raw materials, financial capital, human talent, and technology, are often controlled by other organizations or entities. The theory emphasizes that organizations must strategically manage their relationships with these external actors to secure access to critical resources. To mitigate dependence and gain power, organizations may employ various strategies, including forming strategic alliances, mergers, or acquisitions. They may also engage in lobbying, public relations, or other influence tactics to shape the external environment. Ultimately, resource dependence theory highlights the importance of understanding and managing interorganizational relationships to ensure organizational survival and success.

7. Organizational Learning theory

It insists that organizations are capable of learning and adapting to their environments. This involves acquiring, sharing, and utilizing knowledge to improve performance and decision-making. Organizational learning happens through, Individual learning – through experiences, training, and reflection, Organizational memory – the collective knowledge and experiences of the organization, often stored in documents, databases, or the minds of employees and Knowledge sharing – the dissemination of information and ideas throughout the organization, fostering collaboration and innovation. Effective organizational learning requires a supportive culture that values learning, experimentation, and feedback. It also involves creating systems and processes that facilitate knowledge acquisition, sharing, and application. By continuously learning and adapting, organizations can enhance their ability to innovate, solve problems, and achieve long-term success.

There are many theories involved with organizational health. Institutional Theory suggests that organizations are influenced by societal norms, values, and expectations, Transaction Cost Economics theory focuses on minimizing transaction costs, the costs associated with conducting economic exchanges and Leadership Theory insists Effective leadership plays a crucial role in organizational health.

It's important to note that these theories are not mutually exclusive and can be combined to provide a more comprehensive understanding of organizational health. By considering these theoretical perspectives, organizations can identify areas for improvement and implement strategies to create a healthier, more productive, and sustainable workplace.

5. Frameworks

The Organisational Health Report Index (Fiorelli et al., 1998) and the Healthy Work Organisations Model (Murphy, 1995, 1996) both use structured frameworks to examine the relationship between organisational characteristics (such as management practises, culture, and values) and both organisational health and individual health outcomes. It encompasses various dimensions, including leadership, culture, employee engagement, and strategic alignment (Aghina et al., 2015). To assess organizational health, various frameworks and tools can be used. Some of the frameworks are

1. The 5 Dysfunctions of a team:

Patrick Lencioni's "The Five Dysfunctions of a Team" outlines common pitfalls that hinder team effectiveness. The first dysfunction is the absence of trust, where team members withhold vulnerabilities and avoid honest conversations. This leads to the second dysfunction, the fear of conflict, as individuals prioritize harmony over productive debate. The third dysfunction, a lack of commitment, arises when team members are unable to reach consensus and avoid making decisions. This, in turn, leads to the fourth dysfunction, avoidance of accountability, where individuals fail to hold each other accountable for their actions. Finally, the fifth dysfunction, inattention to results, occurs when individual priorities supersede the collective goals of the team. By understanding and addressing these dysfunctions, teams can improve collaboration, productivity, and overall performance.

2. The 7S framework:

The McKinsey 7S Framework is a powerful tool for analysing and improving organizational performance. It emphasizes the interconnectedness of seven key elements: Strategy, Structure, Systems, Shared Values, Skills, Style, and Staff. By aligning these elements, organizations can achieve greater efficiency, effectiveness, and adaptability.

- Hard Ss: Strategy, Structure, and Systems are tangible elements that can be easily identified and measured.
- Soft Ss: Shared Values, Skills, Style, and Staff are more intangible and cultural elements that influence an organization's behaviour and performance.

The 7S Framework is particularly useful for understanding the impact of change on an organization. By considering how changes in one element may affect the others, organizations can anticipate potential challenges and develop strategies to mitigate them. Ultimately, the 7S Framework empowers organizations to create a more cohesive, aligned, and successful future.

3. The Organization Culture Assessment Instrument:

The Organizational Culture Assessment Instrument (OCAI) (Cameron & Quinn, 2011), is a valuable tool for understanding and improving an organization's culture. By using a simple, yet powerful questionnaire, the OCAI helps organizations assess their current cultural profile and identify their desired cultural state. It maps an organization's culture onto four quadrants: Clan, Adhocracy, Market, and Hierarchy. This visual representation provides insights into the organization's strengths, weaknesses, and areas for improvement. By understanding the cultural gaps, organizations can develop targeted strategies to enhance

their culture and align it with their strategic goals. The OCAI is widely used by organizations of all sizes to foster positive change, improve employee engagement, and ultimately enhance overall performance.

4. The Denison Model:

The Denison Model is a widely used framework for assessing and improving organizational culture. It identifies four key cultural traits that drive performance: Mission, Adaptability, Involvement, and Consistency. Mission refers to the clarity and shared understanding of the organization's purpose and direction. Adaptability measures the organization's ability to respond to change and innovate. Involvement reflects the degree to which employees are engaged and empowered to contribute. Consistency represents the extent to which the organization has a strong, cohesive culture with shared values and processes. By measuring these four traits, the Denison Model helps organizations understand their cultural strengths and weaknesses, identify areas for improvement, and develop targeted interventions to enhance performance.

Indicators

a. Financial Indicators:

Financial indicators provide crucial insights into an organization's health. Key metrics include:

- **Profitability:** It includes Net Income, Gross Profit Margin, Operating Profit Margin, Return on Investment (ROI) and net margin. A larger net margin means larger safety.
- **Liquidity:** ability to meet short term obligations. It is based on Current Ratio, Quick Ratio and working capital turnover.
- **Solvency:** ability to meet long term debts and financial obligations. to analyse solvency, Debt-To-Assets Ratio, Debt-To-Equity Ratio, Equity Ratio and Interest Coverage Ratio are used.
- **Efficiency:** a measurement of cost per unit produced. Efficiency Ratio is used to calculate Inventory Turnover, Accounts Receivable Turnover, repayment of liabilities, usage of equity, inventory and machinery, and Asset Turnover. An efficiency ratio measures the ability of an organization to make income using its assets.

By analysing these metrics, organizations can identify trends, assess financial performance, and make informed decisions to improve their overall health and sustainability.

b. Non-Financial Indicators

Gagnon et al. (2017) tracked over 1,500 organizations in 100 countries over ten years, finding a correlation between health-promoting activities and improved financial performance. A financial indicator is thus a primary organizational health indicator even today. But organizational health takes time to show as a financial improvement. Therefore, it is imperative to look at Nonfinancial indicators, often referred to as soft metrics. They are crucial for assessing an organization's overall health and long-term sustainability. While financial metrics provide a snapshot of past performance, non-financial indicators offer insights into the organization's future potential. Here are some key non-financial indicators

and how they could be assessed/measured from 3 perspectives:

Customer indicators (Sales and follow up): Conversion Rate, Retention Rate, Contact engagement score, customer satisfaction index, net promoter score, active user rate, referral rate, first contact resolution rate,

Internal Process indicators (Operations): customer support tickets, product defect percentage, on-time rate, efficiency measures, overdue project percentage, product return rate, cycle time process improvement, productivity ratios, new products developed, patents filed, and R&D Spending,

Learning and Growth indicators (HR): Salary competitiveness ratio, employee productivity rate, turnover rate for highest performance, average time to hire, internal promotion rate, employee satisfaction surveys, retention rates and metrics on carbon footprint, energy usage, community impact initiatives.

Non-financial indicators offer a holistic view of an organization's health, complementing traditional financial metrics. Grouping indicators of customer satisfaction, loyalty, and market share gauges the organization's standing in the market. Employee satisfaction, engagement, and turnover rates reflect the well-being of the workforce and its alignment with organizational goals. Operational efficiency, process improvement, and innovation capacity measure the organization's effectiveness in delivering products and services. Additionally, social responsibility, risk management, and governance practices indicate the organization's commitment to ethical and sustainable operations.

By tracking these non-financial indicators, organizations can gain valuable insights into their overall performance, identify areas for improvement, and make informed strategic decisions to ensure long-term success.

Benefits of Organizational Health

A healthy organization enjoys numerous benefits, including,

- Improved Performance and clarity: A healthy organization is more likely to achieve its goals and objectives.
- Increased Employee Satisfaction and Engagement: A positive work environment leads to higher employee morale, motivation, and productivity.
- Enhanced Innovation: A culture of innovation fosters creativity and the development of new ideas.
- Stronger Employer Brand: A healthy organization attracts and retains top talent.
- Improved Financial Performance: A healthy organization is more likely to be financially stable and profitable.

Strategies for Improving Organizational Health

Improving organizational health requires a multifaceted approach that focuses on both tangible and intangible factors. Strong Leadership, Strategic Planning and Effective Communication are very important strategies for any organization including fostering a positive work culture through effective communication, employee recognition, and

opportunities for professional development. Additionally, empowering employees to take ownership of their work and contribute to decision-making processes can boost morale and engagement. Prioritizing work-life balance and implementing flexible work arrangements can enhance employee well-being and productivity. By investing in employee training and development, organizations can cultivate a skilled and adaptable workforce. Furthermore, promoting diversity and inclusion can create a more innovative and inclusive workplace. Regular performance reviews and feedback mechanisms can help identify areas for improvement and provide guidance for professional growth. Also, fostering a strong sense of purpose and aligning individual goals with organizational objectives can inspire employees and drive collective success. Improving customer loyalty by rewarding, reengaging and surprising both loyal and at-risk customers improves brand image among the customers and improves customer metrics.

Here are some lesser-known strategies for improving organizational health:

- **Psychological Safety:** Cultivate a culture where employees feel safe to take risks, share ideas, and admit mistakes without fear of negative consequences. This encourages innovation and open communication.
- **Mindfulness and Well-being Programs:** Implement mindfulness practices like meditation and yoga to reduce stress, improve focus, and enhance overall well-being.
- **Social Connection Initiatives:** Organize team-building activities, social events, and virtual communities to foster strong relationships and a sense of belonging among employees.
- **Employee Resource Groups (ERGs):** Support diverse employee groups through ERGs, which provide a platform for networking, mentorship, and advocacy.
- **Continuous Learning and Development:** Invest in ongoing learning opportunities to keep employees engaged, upskill them, and foster a culture of continuous improvement.
- **Employee Recognition and Appreciation:** Celebrate achievements, milestones, and birthdays to boost morale and motivation.
- **Clear Communication Channels:** Ensure effective communication between leadership and employees at all levels to promote transparency and trust.
- **Employee-Led Initiatives:** Empower employees to take ownership of projects and initiatives, fostering a sense of autonomy and responsibility.
- **Regular Pulse Checks:** Conduct frequent surveys or informal check-ins to gauge employee sentiment and identify potential issues early on.
- **Work-Life Balance Initiatives:** Promote healthy work-life balance through flexible work arrangements, time-off policies, and wellness programs.
- **Job Crafting:** Empower employees to redesign their roles to better align with their strengths, interests, and values. This can increase job satisfaction, motivation, and productivity.
- **Quiet Leadership:** Encourage leaders to lead by example, demonstrating positive

behaviours and values. This can create a more positive and supportive work environment.

- **Purpose-Driven Organizations:** Define a clear and inspiring organizational purpose that resonates with employees. This can increase employee engagement and motivation.
- **Employee-Driven Innovation:** Encourage employees to share ideas and suggestions for improvement. This can foster a culture of innovation and creativity.
- **Gamification:** Use game-like elements in the workplace to increase motivation and engagement. This can be used for training, goal-setting, and performance improvement.
- **Biophilic Design:** Incorporate natural elements into the workplace, such as plants, natural light, and water features. This can improve employee well-being and productivity.

The best strategies are those that are tailored to the specific needs and culture of that organization. By experimenting with different approaches, what works best for that team can be found. This will help to create a healthier, more productive workplace.

6. Conclusion:

Organizational health is a multidimensional concept that encompasses various aspects of an organization's well-being. By focusing on strategic alignment, operational excellence, and employee engagement, organizations can foster a healthy and sustainable future. In today's rapidly changing business environment, organizations face increasing pressure to adapt and innovate. To thrive, companies must prioritize organizational health, a concept that has gained significant importance in recent decades.

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