



# Employee Financial Wellness Survey

*Collect. Analyze. Act.*

Your financial wellness benefit offering has incredible potential to positively impact the lives of your employees, inside and outside of work. Your employees can decrease their money stress and increase their wellness, all while positively impacting your organization's culture and bottom line. But how can you best understand the diverse money needs, stressors, and goals of your employees?

**This Employee Financial Wellness survey  
is your tool for success.**

**This survey was created by the financial wellness experts at Francis to help you and the decision-makers at your organization better understand your employees and develop effective programming that provides true solutions to their stressors.** Our guide to Collect, Analyze, and Act will provide you with the roadmap to healthy financial futures and provide you with practical steps forward.

This survey was created as a **complete assessment tool**, ready for implementation at your organization. If you would like help collecting survey data from your employees, analyzing the results, and enacting positive organizational change that meaningfully increases employee financial wellness, contact us to talk through options. We're happy to support you and your organization as you build an incredible financial wellness offering for your people.



# Collect. Analyze. Act.

## How to Implement at Your Organization

Follow this step-by-step guide to implement this financial wellness survey at your organization.

### COLLECT

- 1 Choose your survey platform.** Use a digital platform like SurveyMonkey or Google Forms to house the survey and collect results.
- 2 Keep it anonymous and confidential.** Protect employees' information and help them feel safe while talking about what can often feel like a highly sensitive topic.
- 3 Promote the survey with your *entire* workforce.** Consider running a campaign that incentivizes participation (i.e. everyone who completes gets registered to win a prize OR for every completion, your organization donates money to a local charity). Include in organization-wide digital communications, mention at meetings, hang up posters, etc. Encourage senior management to announce the survey and talk about the importance of this company-wide initiative.
- 4 Ensure all members of your workforce (desked and un-desked employees) have an easy way to access and complete the survey.** Example: Use posters with QR codes so individuals can access the survey on their mobile devices. Provide paper copies, if needed. Consider the language needs of your workforce and translate the survey and communications, if needed.
- 5 If you have a workforce of more than 2,000 employees, consider including additional demographic questions on your survey (i.e. race, location, etc.).** Results can then be analyzed and broken down by these categories to see if there are specific resources these subsets of your population may need to increase their financial wellness.

### ANALYZE

- 1 Set aside time with the HR team and decision-makers to talk through the results. Consider the following questions:**
  - What are you hearing from your employees about stressors, goals, and needs?
  - What are you not hearing about stressors, goals, and needs?
  - Given the results, what initiatives may work best for your workforce?
  - Do you have the people and money resources to make these initiatives happen?
  - If not, how can you use the results of the survey to advocate for resources?
  - If you added demographic questions, are there any patterns and statistically significant results amongst those who share specific identities?

## ACT

- 1** **Share the results of the survey with your entire organization.** It's important to share results with all who participated.
- 2** **Create a plan for future initiatives.** Poster campaigns, workshops, virtual webinars...get creative! Consistently make connections between the survey results you received and the programs you plan to implement; tying future initiatives back to real employee feedback helps to justify time, energy, and resources. Include timeline, budget, resources needed, vendors involved, etc., in your plan.
- 3** **Repeat the survey minimally every two years.** This helps you and your organization to evaluate change over time in the financial wellness and money stress of your workforce. Use this repetitive effort to evaluate the effectiveness of the initiatives long-term.
- 4** **Be open to a couple of the questions changing over time.** Consider adding questions about all workplace benefits your organization offers to employees to get a holistic picture of employee wellness OR consider adding these financial wellness questions to an existing employee survey. Just make sure you don't change too many questions as that decreases the reliability of the survey results over time.

## Survey Questions

1. Please indicate your age range:
  - a. 18-24
  - b. 25-35
  - c. 36-45
  - d. 46-55
  - e. 56-64
  - f. 65 and over
2. Please indicate your gender identity:
  - a. Woman
  - b. Man
  - c. Non-binary
  - d. Prefer not to say
3. How satisfied are you with your present financial situation?
  - a. Very unsatisfied
  - b. Unsatisfied
  - c. Neutral
  - d. Satisfied
  - e. Very satisfied



4. How much stress does your personal financial situation cause?
  - a. No stress
  - b. Minor stress
  - c. Moderate stress
  - d. Major stress
  - e. Extreme stress
  
5. Do you feel like your current financial situation negatively impacts your work?
  - a. No impact
  - b. Minor impact
  - c. Moderate impact
  - d. Major impact
  - e. Extreme impact
  
6. In the event you had an unplanned expense of \$5000, how would you cover it?
  - a. My budget can absorb this
  - b. Emergency savings
  - c. Borrowing from bank or credit card
  - d. Borrowing from friends and family
  - e. I don't know/Other
  
7. How well do you feel you control your budget and spending?
  - a. I consistently maintain a realistic budget and have strong control over my budget
  - b. I occasionally slip up, but overall, I maintain good control over my budget
  - c. I generally manage my budget but there is room for improvement
  - d. I struggle to maintain control over my budget and spending
  - e. I do not budget or monitor my spending
  
8. What are your greatest financial worries? (comment box/paragraph answer)
  
9. What resources would help you tackle your greatest financial worries? (comment box/paragraph answer)
  
10. Does your employer's financial wellness benefit increase the likelihood you will remain with your current employer?
  - a. Yes
  - b. Neutral
  - c. No
  - d. Not applicable

**Questions about implementing this survey at your organization?**

Reach out to Kasey Miller at [kasey.miller@francisway.com](mailto:kasey.miller@francisway.com).

**Interested in exploring more of Francis' services:** check out our website [www.francisway.com](http://www.francisway.com) / follow on [LinkedIn](#).

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