



## Employee needs assessment survey template

This sample employee needs assessment survey can help you understand and identify the financial challenges, needs and wants of your employees when planning a financial wellness program at work. The survey can be used in an electronic or paper format. Depending on your needs, you can add or remove questions.

### Tips:

- It is important to specify that the survey is confidential and anonymous.
- To encourage participation rates, consider offering individual or group incentives.



## Sample invitation message to staff

### **[Name of organization] financial wellness needs assessment**

Here at [Name of organization], we recognize the importance of financial well-being to our employees' health, happiness and productivity. We are developing a workplace financial wellness program and would like to learn more about your needs and interests.

Our goal is to create a financial wellness program based on your needs and that supports everyone. In order to do this, we need your input!

This survey should take less than five minutes to complete.

This survey is 100% anonymous and cannot be tracked back to individual respondents. Responses will be combined and analyzed on a group basis. If there is a question you don't feel like answering, just skip it or indicate "prefer not to say" and move on to the next one.

*[Insert information on how/where to submit the survey if it is a paper-based survey or link to the survey if sending electronically.]*

Thanks in advance for your participation!

*<Signed by Champion >*



## Your financial health

**How would you rate your level of financial knowledge (understanding of the basics of money management)? Select one.**

- Very knowledgeable
- Knowledgeable
- Slightly knowledgeable
- Not at all knowledgeable
- Prefer not to say

**How confident do you feel about your ability to manage your money matters? Select one.**

- Very confident
- Confident
- Slightly confident
- Not at all confident
- Prefer not to say

**How frequently do you get stressed about money matters? Select one.**

- Very frequently / always
- Frequently / usually
- Neither frequently nor infrequently / occasionally
- Infrequently / rarely
- Don't know
- Prefer not to say

**What is the main source of that financial stress? Select one.**

- Household expenses
- Managing debt
- Family obligations
- Not enough savings
- Don't know
- Prefer not to say

## Financial goals and needs

**Do you currently have at least one financial goal? Select one.**

- Yes
- No

**How confident are you in your ability to achieve a financial goal that you set for yourself? Select one.**

- Very confident
- Confident
- Slightly confident
- Not at all confident
- Don't know
- Prefer not to say

**Which of the following life events are currently relevant to you or do you expect to be relevant within the next couple of years (check all that apply)?**

- Buying a home
- Living as a couple
- Starting a family
- Paying for your children's education
- Getting separated or divorced
- Supporting elderly parents
- Supporting adult children
- Getting ready to retire
- None of the above



## Interest in a financial wellness program in the workplace

If we were to offer a financial wellness program for the workplace, what would your level of interest be? Select one.

- Very interested
- Somewhat interested
- Neither interested nor uninterested
- Somewhat uninterested
- Very uninterested
- Prefer not to say

### Rank the top five financial topics that you would like to learn more about

(1 = the topic that interests you the most)

- Determining financial goals \_\_\_\_\_
- Creating a financial plan \_\_\_\_\_
- Budgeting \_\_\_\_\_
- Saving (short and long-term) \_\_\_\_\_
- Planning for retirement \_\_\_\_\_
- Understanding your credit score \_\_\_\_\_
- Borrowing \_\_\_\_\_
- Managing your debt \_\_\_\_\_
- Your rights and responsibilities with financial products \_\_\_\_\_
- Different types of insurance \_\_\_\_\_
- Protection from fraud and identity theft \_\_\_\_\_
- Wills and estates \_\_\_\_\_
- Tax planning \_\_\_\_\_

### Among the following choices, what would be your preferred delivery methods to access a financial wellness program in the workplace?

(Indicate top **three** options only and rank by importance, 1= most important)

In-person workshops	
Live webinars (virtual)	
Videos or recorded webinars	
Paper-based (self-paced learning) (e.g. booklet)	
Written materials on website or Intranet (self-paced learning)	
Interactive tools or applications (e.g. online learning with quizzes or games)	
Other (please specify)	

### When would you be most interested in accessing a financial wellness program?

Select one.

- During work hours
- After work hours
- Having the option of either during work or after work



Are there any other ideas for the financial wellness program that you would like to suggest?

## Demographics

Which of the following age groups do you belong to? Select one.

- Under 30
- 30 to 39
- 40 to 49
- 50 to 59
- 60 and older
- Prefer not to say

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## Thank you

Thank you for participating in the questionnaire. Your answers will be very helpful to us in planning an employee financial wellness program that meets your needs.

*[If you are providing employees with the chance to win a prize, you could provide instructions here for how to enter to win. Or if all employees who participate receive a reward, you could give instructions here on how to claim their reward.]*