

A Guide to Employee Benefits Surveys

— Best Practices and a
Template to Get Started

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Introduction

Employee benefits play a leading role in supporting employers' goals of recruiting and retaining a productive and diverse workforce. In fact, in 2022, a desire for better benefits is the third leading reason for employee attrition, trailing only the desire for better compensation and flexibility.

Supporting the needs of your diverse workforce means implementing an equitable benefits program to provide resources that employees at every life stage will use and value. Employees' needs aren't always aligned with their age, gender identity, or location, so it's important to ask them—regularly—about what support and resources they need today to be productive and happy at work.

When to Survey Employees



Employee Survey Timeline

Survey frequency may vary based on your team’s bandwidth, but we recommend issuing a survey at least twice a year. Life changes quickly. It’s important to keep a pulse on the evolving needs of your workforce so you can identify:

- Opportunities to “re-launch” or promote existing benefits
- New benefit needs for segments of your workforce
- Legacy benefits that are underutilized due to lack of interest or need

Use this framework to build your own timeline to create, launch, and analyze your employee survey.

Action	Due Date
Customize the survey template from Care for Business for your company. Share with stakeholders for approval.	Monday, October 3rd
Build the survey in the desired tool and test with 2-4 peers.	Friday, October 7th
Launch survey in company-wide email using best practices to drive survey adoption as outlined below.	Tuesday, October 11th
Send reminder communications to the workforce to complete the survey.	Wednesday, October 12th - Friday, October 14th
Analyze survey results and identify next steps.	Monday, October 17th - Friday, October 21st
Let your employees know you’re listening! Share a survey results summary and general observations with the organization, along with your next steps based on the data.	Monday, October 24th - Friday, October 28th

Survey Best Practices



How to Create an Employee Benefits Survey


There are a variety of free and low-cost survey tools available for employers. Check with your IT teams on available resources that comply with your corporate security policies, or explore:

- **Google Forms:** This is a free option if your company uses Google Workspace. You can build a simple survey that will push results to a Google Sheet, where you then analyze results with basic Excel functions.
- **SurveyMonkey:** There are both free and enterprise versions available with a variety of features to help you distribute, customize, and analyze the results.
- **Employee engagement software:** Check out SHRM's list of Employee Engagement Vendors who offer more advanced and customizable features for employee engagement surveys and monitoring.

How to Distribute the Survey to Employees

To drive the most participation from your workforce, you want the survey to be shared far and wide. Consider a multi-channel approach to launching the survey to capture attention from every employee.

1. **Email:** Tried and true, for those that use it, they will see it. Keep your email copy short and sweet, and highlight your goals and any opportunity to win a prize/raffle for participating. Above all, make sure your deadline is clear!
2. **Slack/Teams:** For some, they spend their days amongst the “channels.” If you have a channel for the whole company, HR, or both—share a link to the survey and a brief description here. Point to your email for more detail.
3. **Managers:** Every manager has 1:1s and team meetings. Have them add the survey to their agenda to ensure every employee is aware.

 **Tip:** You could launch a competition and reward the top three teams with the highest participation percentage with lunch or a DoorDash gift card.

4. **Workday task:** Create a task in Workday (or your HRIS system) for every employee.
5. **All-hands announcement:** Have a big all-hands meeting coming up? Add this survey to the agenda to catch people while you have their undivided attention.

Tips for Driving Survey Participation

Survey response rates can average 25-60% based on the responsiveness of your workforce and type of survey you release. During your planning phase, consider these three tips to driving survey participation:



Make it easy

Any tasks outside of an employee's required workload should be easy to complete. Keep this in mind as you build your survey. Is it accessible on mobile? Is it easy to click through and complete?



Make it meaningful

Be transparent—what's in it for them? By completing this survey you're going to better understand their needs *today* so you can optimize your employee benefits to better support them at home and at work.



Make it fun

Everyone loves a little competition or a reward. Offer a small prize or gift card for the first [#] participants, or raffle a desirable item to those who participate by the survey deadline (gift card, Apple Watch, company swag, etc.).

Post-Employee Benefits Survey Follow Up

After the survey, make sure you provide a summary to your senior leadership and those who participated.

- **For senior leadership:** Share survey response rate, key learnings, and recommended next steps for benefit evaluation, sunsetting, or expansion based on those learnings.
- **For employees:** Thank them for their participation, celebrate the response rate, and create a list of “we heard you” bullets with high-level summaries of their wants and needs. Share a statement about exploring how you plan to optimize your benefit package to meet those needs in the near future.

Sample Employee Benefits Survey Questions



Creating Your Employee Benefits Survey

When writing your survey, keep it quick and easy. Try not to overcomplicate your questions and responses, but avoid repetition in structure to prevent employees from “clicking through” without actually providing honest input.

The survey below is designed to identify trends in workforce needs, evaluate awareness and interest in your existing benefits, and identify opportunities for benefit enhancement moving forward.

Tell Us About Yourself


Warm up with some demographic questions. This will help you segment your data and establish employee persona groups later on. In addition (or instead of) the following questions, you could ask about work setting/locations, travel time percentage, number and age of dependents, etc.

1. What age group are you in? [select one]

- Under 25
- 26-34
- 35-44
- 45-54
- 55 or older

2. Which life stage do you identify with? [select all that apply]

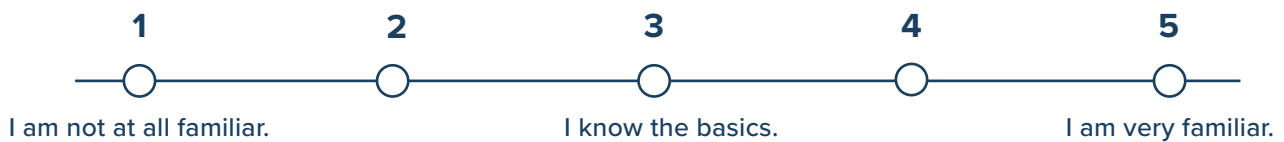
- No dependents, focused on self-care
- Pet parent & independent
- Planning or building a family
- Raising a family
- Caring for children and an adult loved one
- Caring for an adult loved one
- Planning for retirement

 **Life stages don't always happen in sequential order, and can overlap. Give your employees the opportunity to tell you about every life stage they're experiencing right now.**

3. How would you describe yourself? [select one]

- Individual contributor
- Individual contributor with a desire to manage others
- People manager
- Division leader
- Executive

4. On a scale of 1-5, how familiar are you with [Company]’s employee benefits?



5. How long have you been with [Company name]?

- Less than 1 year
- 1-3 years
- 4-5 years
- 5+ years

Today’s Benefits

In this section, you’ll ask about your existing benefits to understand awareness, satisfaction, and utilization. The output of these questions will help you understand what you should keep, expand, sunset, or re-launch to re-educate your workforce.

1. Which health care plan are you currently enrolled in? [NOTE: Customize the first options in the list to represent the plan options you offer]

- Plan Option 1 - Single [customize]
- Plan Option 2 - Single [customize]
- Plan Option 1 - Family [customize]
- Plan Option 2 - Family [customize]
- I’m not on [Company]’s health care plan
- I don’t know

2. What is your perception of our health care plan today?

- It works for me [and my family]
- I have difficulty finding in-network providers or specialists
- The cost is higher than expected
- I'm not on [Company]'s health care plan
- Other [explain]

Type your response here.

3. Rank, in order, the benefits you value the most today.

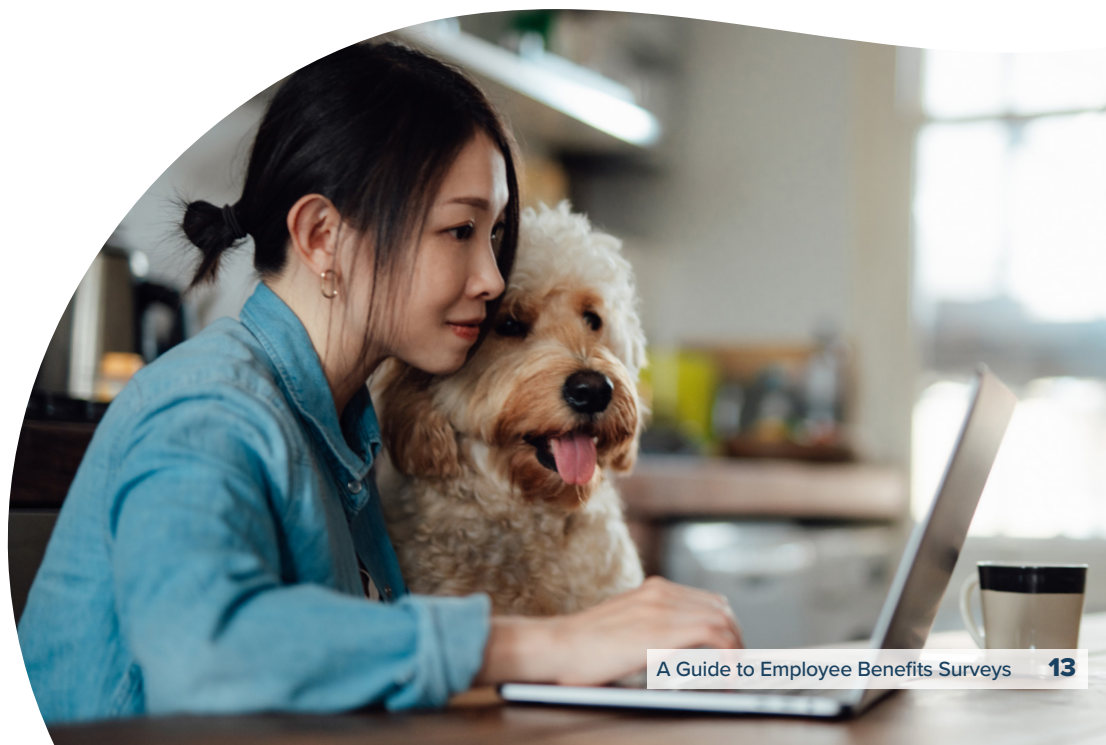
- Health insurance (including dental and vision)
- 401(k) with XX% match
- Backup child care
- Backup adult care
- Backup pet care
- Parental leave (XX weeks for birthing and non-birthing parents)
- Unlimited PTO (customize PTO policy/quantity for your company)
- Commuter expense reimbursement
- Gym membership discounts
- Care Membership (platform to find caregivers)
- Child care tuition discounts
- Breastfeeding support and breastmilk shipping
- Headspace meditation app
- Access to Care Specialists for guidance & resources
- On-demand tutoring
- Insert other benefits you offer in this list



This is your opportunity to celebrate everything you offer! List out every single benefit. It's important to highlight what exists today as a reminder.

4. Which of the benefits have you used, or do you plan to use in the near future?

- Health insurance (including dental and vision)
- 401(k) with XX% match
- Backup child care
- Backup adult care
- Backup pet care
- Parental leave (XX weeks for birthing and non-birthing parents)
- Unlimited PTO (customize PTO policy/quantity for your company)
- Commuter expense reimbursement
- Gym membership discounts
- Care Membership (platform to find caregivers)
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- Headspace meditation app
- Access to Care Specialists for guidance & resources
- On-demand tutoring
- Insert other benefits you offer in this list



5. After seeing this list, were there any benefits you didn't know we had before this survey?

- Health insurance (including dental and vision)
- 401(k) with XX% match
- Backup child care
- Backup adult care
- Backup pet care
- Parental leave (XX weeks for birthing and non-birthing parents)
- Unlimited PTO (customize PTO policy/quantity for your company)
- Commuter expense reimbursement
- Gym membership discounts
- Care Membership (platform to find caregivers)
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This question will help you understand which benefits your team should prioritize in future promotional communications to drive enrollment and utilization. The data will tell an interesting story when you break it down by the life stage stage information captured above!



6. For the following statements, please state if you strongly agree, agree, disagree, or strongly disagree.

	Strongly Agree	Agree	Disagree	Strongly Disagree
The benefits offered by [company] are one of the top reasons I stay at [company].	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The benefits offered by [company] help make me more productive.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The benefits offered by [company] provide something for every employee at every life stage.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The benefits offered by [company] are affordable and accessible.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The benefits offered by [company] make [company] a desirable place to work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Is there anything else you'd like to share about the benefits we offer today?

Type your response here.

Future Benefit Opportunities

In this final section, you'll ask questions to uncover new benefit needs and opportunities. This includes questions about what causes an employee to be stressed, miss work, feel distracted, and their perception about what is missing from your offering today. Remember: employees are not as familiar with the benefits landscape as you are, so use clues from their pain points to identify new solutions.

1. Life happens, and sometimes we have to miss work to take care of things at home. Which of the following are common reasons you may need to miss work or adjust working hours? [Select all that apply.]

- Gaps in child care (schools closed, day care closed, nanny gaps, etc.)
- Gaps in senior care
- Gaps in pet care, or pet illness
- Issues with safe or reliable transportation
- Stress or anxiety due to work
- Stress or anxiety due to personal matters
- Burnout or exhaustion
- Personal sickness and/or medical appointments
- Family sickness and/or medical appointments
- Other



This can be a sensitive question. Help create safety in responding honestly with empathetic language.

Type your response here.



2. It's important that we help you balance the demands of work and life, so you can be your best self at work and for your loved ones at home. Which of the following are common reasons you may feel distracted or unproductive during the workday? [Select all that apply.]

- Managing a major life event (divorce, home buying, adoption, childbirth, etc.)
- Concerns with finances
- Burnout or exhaustion
- Personal relationships
- Personal mental health/wellness
- Gaps in child care
- Gaps in adult care
- Gaps in pet care
- Other

Type your response here.

3. What benefits have you heard of from other employers that you wish we offered?

Type your response here.

4. If we had to sunset an existing benefit, to add what you listed above, what benefit would you be willing to give up?

Type your response here.

Thank you for your feedback! We will notify the winners of [insert description of raffle or prize to participate] by [DATE], and will share a summary of the survey with employees soon.



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Care is the world's leading platform for finding and managing high-quality family care. We are designed to meet the evolving needs of today's families and caregivers, including the support of employees with their care challenges at every life stage. From access to the largest care platform to backup care to dedicated support from specialists, Care for Business offers the most comprehensive suite of family care benefits in the industry. Investing in care benefits helps employers increase productivity, retain top talent, and support the diverse needs of your workforce.

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