



**WELL**<sup>TM</sup>  
PROGRAM

---

GUIDEBOOK



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# INTRODUCTION

## Purpose

This guidebook explains the process WELL teams use to engage with the International WELL Building Institute (IWBI) to work with the WELL Building Standard (WELL), including documentation requirements, review timelines, recertification and renewal requirements, and project privacy status and publicity information. For information regarding feature requirements and scoring calculations, please see the Overview to the specific WELL program, available at [y2.wellcertified.com](https://y2.wellcertified.com).

## Overview

There are three main pathways to engage with the WELL:

### **WELL Certification for Single Locations**

Individual locations enroll to pursue WELL Certification using the WELL Building Standard. There are four certification levels: Bronze, Silver, Gold, and Platinum. (For details on scoring and levels of achievement, see the Overview to the [WELL Building Standard](#).)

### **WELL Ratings**

WELL ratings are a subset of features from the WELL Building Standard centered around specific themes like health and safety, performance and equity. Locations can earn WELL ratings as a standalone achievement or a milestone in their WELL journey and are awarded a corresponding seal in recognition of their achievement. Strategies implemented can be automatically applied to a future WELL Certification scorecard or WELL Score™ (see below), giving project locations a head start toward larger commitments. There are pathways to streamline application of WELL ratings for multiple locations. (For details on scoring, see the Overview to the [WELL rating](#) of interest.)

### **WELL at Scale**

This pathway enables organizations to demonstrate their leadership by applying WELL across five or more locations in a streamlined and cost-effective approach. Designed to maximize the positive outcomes related to human health and well-being along with the value of assets, this method for engaging with WELL is for companies at the leading edge of the movement to improve global health.

Under WELL at scale, WELL teams may submit WELL features for review for incremental improvement, receive benchmarking of performance, and/or achieve WELL Certification and WELL ratings for the subscribed locations. Within the WELL at scale pathway, there are two engagement routes for organizations: Enterprise, for an entire legal entity; and Portfolio, for five or more locations which do not constitute an entire legal entity. Enterprises receive a WELL Score™, representing the aggregate achievement of the entire organization. (For details on calculating the WELL Score, see the Overview to the [WELL Building Standard](#).)

# ENGAGEMENT

## Enrollment

*WELL Certification for single locations and WELL ratings only*

Enrollment is the first step organization can take on their journey with WELL ratings and WELL Certification. The WELL digital platform (the "Platform" (accessible at [projects.wellcertified.com](http://projects.wellcertified.com)) is the official enrollment platform, project management system and performance dashboard. A project's enrollment date is the date payment is received by IWBI.

Following the enrollment date, projects have three years to achieve certification and one year to achieve a rating. If a project anticipates difficulty in meeting these deadlines, the project administrator may request a six-month extension for no additional fees or may seek a 1 year (WELL Certification and WELL ratings) or 3 year extension (WELL Certification), additional fees apply. If the timelines are not met, enrollment will expire, and the location(s) must enroll again.

Once the enrollment fees have been paid and received by IWBI and the WELL program agreement is accepted, the location(s) are considered officially enrolled in WELL. This entitles the WELL team to:

- Access to technical support from the WELL coaching team.
- Access to the Platform for resources and management of WELL scorecard (including submission of documentation in support of certification or rating).
- Review of documentation (WELL ratings only; additional fees apply for WELL Certification).

## Subscription

*WELL at scale only*

Subscription is the engagement pathway for organizations using WELL at scale. For Enterprise subscriptions, the minimum term is one year; for Portfolio subscriptions, the term is five years.

A subscription includes:

- Review of feature documentation and performance testing results by a third-party WELL Reviewer, which contributes to:
  - The WELL Score™ (for enterprise subscribers).
  - Unlimited WELL Precertification, WELL Certification, and recertification for all qualifying subscribed locations.
  - Unlimited WELL ratings for all qualifying subscribed locations.
- Performance dashboard for subscribed locations.
- Communications guidelines and templates to promote participation and accomplishments.
- Dedicated coaching support to help identify health and well-being strategies and opportunities for improvements and recognition.
- Complimentary IWBI membership for the duration of the subscription.

Subscription costs do not include fees associated with third-party onsite performance testing; see the *Performance Verification* section of this guidebook for details. Additional fees for other optional services may also apply.

# SCOPE AND BOUNDARIES

## Project Boundary

At enrollment or at the start of subscription, WELL teams must define the physical boundaries of project location(s). The location(s) should be defined by a clear boundary such that it is physically distinct from non-enrolled areas (e.g., wall, fence, lot line). The boundary may not unreasonably exclude portions of the building, space or site to give an advantage in complying with feature requirements. Pursuit and achievement of the features must be consistent within the project boundary. The scope of the project boundary must be accurately communicated in all promotional and descriptive materials and distinguished from any non-enrolled or subscribed space.

### Multiple Buildings in One Project Boundary

A single project boundary may encompass multiple distinct structures that are not physically connected, provided the following conditions are met:

- All buildings must be under the same ownership and management.
- The buildings must be located adjacent to each other (i.e., there is no land unaffiliated with the location intervening) and the project boundary must encompass all outdoor space affiliated with the enrolled property.
- The buildings must be related to each other (e.g., part of a corporate or education campus or resort), and the project name must accurately describe the group of buildings.

This pathway allows the group of buildings to be treated, for all intents and purposes, as a single. The buildings are analyzed as a whole (i.e., in aggregate) for all features and with regard to project area. Since the buildings constitute a single location, the same set of features must be applied to all buildings, documentation must be submitted for review at the same time and the buildings must undergo performance testing together.

## Project Area

Teams are required to enter the area of their project location(s) ("project area") for recordkeeping and, in some enrollment types, for billing purposes. This area should include the sum of the floor areas of the spaces within each location including, as applicable, basements, mezzanines, intermediate-floored tiers and mechanical penthouses with headroom height of 2.3 m [7.5 ft] or greater. Measurements must be taken from the exterior faces of the exterior walls OR from the centerline of walls separating buildings. The project area should exclude non-enclosed roofed-over areas such as exterior covered walkways, porches, terraces or steps, roof overhangs and similar features. It should also exclude air shafts, pipe trenches, chimneys and floor area dedicated to motor vehicle parking and circulation.

Note that the project *boundary* may include spaces excluded from project *area*, including roof decks, parking spaces and building grounds. (Since these areas are not included in the project area, they will not contribute to the assessed fees for WELL Certification for single locations).

## Scope of Subscription

*WELL at scale only*

Organizations subscribing to WELL at scale will work with an assigned WELL coaching contact to define the number and composition of locations within the subscription (minimum five locations). Subscription fees are assessed annually based on the number of subscribed locations at the time of renewal.

The organization must accurately communicate the scope of the subscribed locations in all promotional or other public-facing materials and distinguish them from any other properties with the same owner. Further guidance regarding how to publicize subscribed properties can be found in the WELL Marketing and Branding Guidelines.

The following types of use cases should be excluded, unless otherwise approved by IWBI, from any subscriptions as they do not currently qualify for WELL.

- Undeveloped land without an associated building. (Undeveloped land that is part of the same parcel as a building should be included in that location's project *boundary*. As noted in *Project Area*, it is not assessed for billing purposes.)
- Detached single family homes.
- Temporary structures that are assembled for less than one year, such as field offices, site trailers and event facilities.
- Sites for permanently remote employees that are not owned or contracted by the owner, such as client sites, homes, coffee shops, internet cafes and similar spaces.

During the subscription process, the administrator will decide to enroll with an enterprise-level commitment (that is, all locations owned, managed and/or operated by an entire legal entity, as applicable) or as a portfolio (at least five properties which do not constitute all locations of an entire legal entity). While the application and review of features is the same in both cases (see *Applying Features to Multiple Locations*), the benefits and pricing differ.

*Table 1: Enterprise vs Portfolio Engagement for WELL at Scale*

| Subscription Type | IWBI Membership | Aggregate Performance Metrics | WELL Score™ | Streamlined Review for Multiple Locations |
|-------------------|-----------------|-------------------------------|-------------|---|
| Enterprise        | Keystone        | Yes                           | Yes         | Yes                                       |
| Portfolio         | Cornerstone     | Yes                           | No          | Yes                                       |

## **Enterprise**

Enterprises are defined as an organization which enrolls its entire legal entity. Clients that subscribe at the enterprise level receive complementary IWBI membership at the Keystone level and the WELL Score. Real estate clients that enroll all of their directly managed properties, even if those properties do not include their entire legal entity, are considered an Enterprise and eligible for the same benefits above.

Use the following sections to identify the locations to subscribe as part of the legal entity.

### *Adding and Removing Locations*

The subscribed locations should continuously and accurately reflect the legal entity's inventory of properties. If additional properties that qualify are acquired, they must be added within one year of acquisition. (Hence, they need not immediately impact the WELL Score or other overall metrics.) If properties are divested or otherwise removed from the legal entity, they must be removed from the subscription by the next review cycle (see *Feature Review*).

### *Buildings Under Construction*

Properties under construction that qualify for inclusion must be subscribed. Note that a location that has not yet reached substantial completion may only use feature documentation for the purpose of pursuing Precertification (see *Documentation Stages*).

### *Exclusions*

The following types of buildings and workspaces *may* be excluded from the scope of subscription:

- Spaces for which there is a contract lasting less than one year (e.g., month-to-month leases).
- Completed spaces with no regular occupants, which may include storage facilities and data centers.
- Buildings less than 139 m<sup>2</sup> (1500 ft<sup>2</sup>).
- Buildings scheduled to be divested, demolished or otherwise exited from within the next 12 months.
- Joint ventures where the legal entity's ownership stake is less than 25%. (Joint venture properties where the ownership is 25% or more must be included and counted in full.)

#### *Remote Workers*

The WELL Score pertains to an entire organization, and thus accounts for all employees at the organization, including those who work remotely. Organizations should include remote workers if they constitute at least 5% of their total employees (excluding contractors or consultants).

In these cases, the administrator should create one or more “remote locations” in the Platform with a name that signifies the location represents remote workers. When entering location information in the Platform, the administrator should note the occupancy as the total number of remote employees and the project area as zero.

Feature documentation may be assigned to “remote locations” to reflect WELL strategies that are applicable to remote employees. The administrator may create multiple “remote locations” in their subscription to represent subsets of remote employees (e.g., groups that are subject to different policies). Each location should reflect the total number of remote employees in that subset/group.

Employees who are counted toward the occupancy of a subscribed property are not considered remote workers; for example, an employee who works from home several days a week but is counted toward the occupancy of a subscribed office location would not be considered a remote worker. However, employees who work primarily in an excluded location and are *not* included in the occupancy count of a subscribed, non-remote location should be counted as remote workers; for example, employees who work from home or from a co-working location that has a month-to-month lease and who are not counted toward the occupancy of subscribed, non-remote location would be considered remote workers.

#### **Portfolio**

Portfolios are defined as an organization which enrolls at least 5 properties that do not constitute its entire legal entity. The portfolio subscription enables organizations to participate in the WELL at scale program and certain benefits, even if all locations in a legal entity are not part of the subscribed properties. Teams have the flexibility to choose which locations to subscribe; only locations included in the subscription are eligible to receive WELL coaching support and use IWBI branding material. Organizations with a subscribed portfolio receive complementary IWBI membership at the Cornerstone level.

Portfolios do not receive a WELL Score.

#### **Groupings and Sub-portfolios**

Administrators may group locations within their subscription to track progress, assess characteristics and assign documentation to selected subsets of their properties. These groupings can be based on any characteristics and need not adhere to the rules of defining a portfolio or legal entity; as such, they will not be publicly displayed or given an official designation by IWBI.

If a subscribed set of locations includes a sub-portfolio consisting of at least five locations that meet the requirements for a WELL benchmarking category (all an organization's locations in a given

country/region or of a given sector), those locations are eligible to be benchmarked to other peer groups and listed on associated WELL leaderboards.

For example, if a global organization subscribed 20 locations including all 10 of its locations in Europe, the performance of the sub-group in Europe would be eligible to be benchmarked against other locations in Europe and be listed on the Europe leaderboard. However, unless the 20 locations represented all locations in its entire legal entity, the overall performance of the subscribed locations would not be included in the global leaderboard, and the organization would not receive a WELL Score. Administrators will be notified if their subscribed locations are eligible for any public benchmarking (including any based on sub-portfolios), allowing them to opt in for inclusion in the associated leaderboards.

## WELL VERSIONS AND PROGRAMS

For clarity, in this document the "WELL Building Standard" or "WELL" refers to the WELL Building Standard v2, except as noted otherwise. Registration for the WELL Building Standard v2 pilot or WELL Building Standard v1 is no longer open. For locations already registered for one of these programs, refer to the version of the WELL Certification Guidebook associated with the location's registration date.

WELL undergoes constant evolution through quarterly addenda. WELL Addenda reflect enhancements to feature language and new strategies and alternative approaches to existing feature that respond to feedback from the market, emerging technology and new research.

As a default, the WELL Addenda that was current upon paid enrollment/subscription is applicable to the enrolled or subscribed location(s). Administrators may choose to update to a newer addendum for any or all features.

### Versions and WELL at Scale

Locations added to an organization's subscription after subsequent WELL Addenda have been released by IWBI may also use the version in place when the organization's subscription began. Alternatively, if an organization or portfolio includes a previously enrolled WELL v2 location upon subscription, the administrator may select the addendum which applies to the previously enrolled property, so as to keep the entire property set following the same addenda.

Organizations participating in WELL at scale may include both WELL v2 and WELL v2 pilot locations (for any previously registered under WELL v2 pilot) in their subscription. However, each location must pursue either WELL v2 or WELL v2 pilot. Locations using one program may not share documentation with those using the other, except via the WELL v2 Skybridge tool as follows:

- WELL v2 locations can use documentation submitted for WELL v2 pilot for features listed in Table 2.
- WELL v2 pilot locations can use documentation submitted for WELL v2 for features listed in Table 1.

Organizations may subscribe and include locations previously registered or enrolled to pursue WELL Certification (including those locations which registered or enrolled under WELL v2 pilot or WELL v1). Invoices already paid for enrollment will not be refunded. Any outstanding single-asset invoices for services not provided will be voided, and all subsequent certification costs applicable to those properties, excluding performance testing fees, will be included in the new WELL subscription invoice. Separate fees for other optional services may also apply.

Locations in a subscription previously registered for or certified under WELL v1 may continue to use WELL v1, but its documentation cannot be shared with the other subscribed locations. (For details on how WELL v1 locations affect metrics of an organization or portfolio's overall performance, see *Designations for Organizations and Portfolios*). These locations are not accounted for in WELL subscription fees, but subsequent single-asset WELL Certification fees apply.

Alternatively, administrators may upgrade their WELL v1 and WELL v2 pilot locations to WELL v2 for their certification or next recertification, as applicable, at which point they may share documentation with the rest of the subscribed locations and be accounted for in the subscription fees. To assist in the upgrade, these locations may use the feature equivalents listed in the recertification/upgrade tool, even if they have not yet achieved WELL Certification.

# ROLES AND RESPONSIBILITIES

## Testing Agents and Reviewers

As part of the review and certification process for WELL, compliance with WELL feature, including feature documentation and performance testing results, are evaluated by third-party review personnel.

### **WELL Reviewer**

After a WELL team submits documentation, or in the case of a subscription, schedules the first review cycle, IWBI will assign a WELL Reviewer to the account. The WELL Reviewer is the individual responsible for reviewing submitted documentation and performance testing results to confirm achievement of feature requirements.

### **WELL Performance Testing Agents and Organizations**

A WELL Performance Testing Agent is an individual who conducts on-site performance testing for locations pursuing WELL Certification or certain ratings. These individuals work for WELL Performance Testing Organizations. All WELL Performance Testing Agents undergo training to evaluate on-site environmental parameters according to WELL testing protocols and equipment specifications. A list of approved WELL Performance Testing Organizations is available online on IWBI's website. WELL Performance Testing Organizations must demonstrate that there is no conflict of interest with the WELL team.

In some cases, if indicated by feature verification method, performance data can be collected by other qualified professionals or permanently installed sensors.

## Team Roles

Team members for organizations and project locations have distinct responsibilities as described below.

### **Administrator**

Administrators act as project managers and oversee the process for pursuing WELL designations. The project administrator is the primary point of contact and must be copied on all correspondence with IWBI and the WELL Reviewer. This individual will also be the recipient of a comprehensive WELL report following documentation review and performance verification, as well as the WELL designation award package.

The administrator is ultimately responsible for the overall quality of the documents submitted to the Platform and is expected to complete a thorough quality control check of all documentation and forms prior to submission for review.

The administrator can be a WELL Accredited Professional (WELL AP), the owner or another designated representative of the WELL team. For WELL at scale, the main administrator may assign one or more project administrators or sub-administrators to manage individual locations or groupings of locations within the subscription, if applicable.

### **Owner**

Owners are responsible for authorizing enrollment of the organization and/or project location(s) and will be required to validate various documents used to demonstrate that some WELL features are satisfied. The WELL at scale Agreement will be sent to the designated portfolio owner by email for their eSignature.

An owner can be from the entity that owns or has a right to possess (including as a lessee) or controls the listed properties or a representative who is delegated responsibility by an entity or entities that

own, possess or lease the properties. Owners have the authority to hold and/or control location-relevant property and to authorize decisions pertaining to that property.

In circumstances where multiple owners hold rights over an enrolled property or properties, a single owner must be identified as the authorized decision-maker for purposes of the WELL program. In such cases, the WELL team must submit a Confirmation of Primary Owner's Authority form, which is available upon request.

### **Additional Signatories**

Some WELL documents require validation by the professional overseeing the relevant aspect of design, construction or operations. Therefore, architects, contractors and engineers are required to provide specific declarations and/or calculations. Further, an owner's representative may, in place of the owner, play a role in affirming that design and operational requirements are met.

### **WELL AP (WELL Accredited Professional)**

The WELL AP credential recognizes building industry professionals who are knowledgeable regarding the conceptual and applied frameworks of WELL and are experienced in its application. WELL APs can guide the owner on the WELL journey and individual locations through the certification and/or rating process. Teams are not required to include a WELL AP, but working with a WELL AP will help to address WELL requirements and qualifies for achievement of a pre-approved innovation feature.

### **WELL Coaching Support**

Upon payment of the enrollment fee, WELL teams gain the opportunity to access WELL coaching support and other resources. For WELL at scale, subscribed organizations and portfolios are assigned a dedicated WELL coaching contact from IWBI to provide support and guidance to the administrator in achieving desired goals across the portfolio. WELL coaching support is available to answer questions, share helpful resources and tools and provide feedback and direction throughout the engagement with IWBI.

Coaching contacts from IWBI do not play a role in approving feature submissions or certification rulings.

# DOCUMENTATION REQUIREMENTS

Pursuit of WELL features require WELL teams provide documentation as evidence that certain requirements are met. The Platform is to submit and retain information for review by the WELL Reviewer. Documents can be uploaded to the Platform as they are prepared. The administrator will be notified when all documents have been reviewed and approved by the WELL Reviewer.

Review of all documentation (including performance results and documentation for precertification) is included in the subscription fees for WELL at scale and the enrollment fees for location(s) pursuing WELL ratings. For single locations pursuing WELL Certification, an additional documentation review fee is due at the time of documentation submission. If the location is seeking WELL Precertification, fees are due at the point of review for precertification – these fees are then credited toward the total documentation review fees.

## Verification Method Types

### Letters of Assurance (LoAs)

Letters of Assurance are documents signed by a relevant professional or other participant who oversees implementation of a specific feature to affirm that the requirements have been met. Templates are available in the Platform for the designer, engineer, contractor and owner. A Letter of Assurance designated to a particular member of the WELL team can be reassigned to a different member with the appropriate expertise. LoAs are often accompanied by a second verification type (e.g., photograph) or relate to measurements in another WELL feature (e.g., air quality tests).

### Professional Narrative

A professional narrative consists of a statement or summary that describes how WELL requirements have been met.

### Policy and/or Operations Schedule

Policy documents and operation schedules communicate information to the occupants or staff in the space or other personnel involved with fulfilling feature requirements, unlike documents such as Letters of Assurance or Professional Narratives which are generated solely for the purposes of WELL Certification.

- Policy Document: A document that describes an enacted policy, program or initiative and how the policy is communicated to stakeholders in the project (e.g., employees). Examples may include company handbooks, human resource documents, hiring protocols, all-staff emails or newsletters. Policies and laws enacted by a government that apply to a location may also be submitted.
- Operations Schedule: A document outlining a schedule or cadence of events or activities that relate to WELL requirements.

### On-going Reports

Certain WELL features require documentation to be submitted annually. Reports are submitted to the Platform per the scheduled listed in the requirements and need not be submitted for initial pursuit of the feature.

- On-going Data Report: The data output for WELL requirements that require ongoing monitoring or reporting. This may include survey data.
- On-going Maintenance Report: A record demonstrating that ongoing maintenance activities have been met (e.g., inspections logs, photographs taken by the WELL team).

## Forms

- Beta Feature Feedback Form: A form with a series of questions related to the experience of implementing a beta feature. Refer to the digital scorecard to complete the required documentation where applicable. This form does not expire and therefore does not need to be resubmitted for review at recertification or renewal milestones.
- Innovation Form: A form with fields for the WELL team to describe the strategies that support the health and well-being of occupants in a novel way that is not covered in WELL v2. Refer to the Innovation section in WELL v2 or in the WELL rating for more information.

## Technical Document

Technical Documents include several specialized documentation types.

- Architectural Drawing: Technical drawing of a building or space that shows the floor plan.
- Mechanical Drawing: Technical drawing that show information about HVAC systems.
- Modeling Report: Report from simulation software.
- Product Specifications: Documents that outline the technical information for an installed product which may include materials, functionality or environmental performance metrics (e.g., SDS, cut sheets).
- Map: A document that shows the features of a geographic area, such as proximity between project location and available amenities.
- Remediation Report: A report that documents the results of risk reduction activities carried out once a hazard is identified. Remediation reports and associated activities are typically carried out and prepared by trained professionals.
- Test Report: A report that documents on-site performance measurements, performed by an independent professional. Test reports and associated measurements are typically carried out and prepared by trained professionals and typically involve specialized equipment or licensure (e.g., radon testing). These measurements and reports are different from those gathered and submitted by a WELL Performance Testing Agent.
- Other: A list of specific information that the WELL team must provide to document compliance. This information is clarified in a verification note (available in the Verification Tab of the digital standard).

## Performance Test

Performance tests include a series of on-site measurements conducted by a WELL Performance Testing Agent to gather data about the location's environmental conditions. Performance testing requirements, including methodologies and guidelines, are outlined in the [WELL Performance Verification Guidebook](#). Data collected during on-site testing is submitted via the Platform and reviewed by a WELL Reviewer to determine compliance with the required test processes and thresholds.

## Sensor Data

Some WELL features can be verified through data collected from permanently installed sensors. IWBI provides a data output and analysis template, available on the [resources page](#). Teams must also include annotated drawings and photographs showing information about the sensor density and placement within the space. See the [WELL Performance Verification Guidebook](#) for more information.

## On-Site Photographs

Photographs provide evidence that certain requirements are present within the space such as signage or furniture. They typically supplement other types of documentation (e.g., Letters of Assurance). The

location where and the date when the photograph was taken and the date must be clearly identified (e.g., geotag, file name, folders, and/or an annotated document).

Photographs may be taken on-site either by a WELL Performance Testing Agent as part of performance verification or by a member of the WELL project team and submitted for documentation review.

## Applying Features to Multiple Locations

*Applies to WELL at scale and WELL ratings only*

Owners that concurrently subscribe or enroll multiple properties can leverage opportunities to submit documentation efficiently at scale. Documentation for all locations must be submitted during the applicable review cycles.

Rather than submitting a distinct document for review for each project location, WELL teams have the option to share certain types (or "scales") of documentation across their organization or portfolio. The scales are described in summarized in *Table 2* and described in greater detail below.

*Table 2: Scales of Document*

| Verification method                        | Scale                             |
|--|-----------------------------------|
| Letters of Assurance                       |                                   |
| Operations Schedule and/or Policy Document | Shareable                         |
| Beta Feature Feedback Form                 |                                   |
| Innovation Form                            |                                   |
| On-going Data Report                       |                                   |
| On-going Maintenance Report                | Audited                           |
| Photographs                                |                                   |
| Professional Narrative                     |                                   |
| Performance Test                           |                                   |
| Sensor Data                                | Individual                        |
| Technical Document                         | Varies (see feature in scorecard) |

### Shareable Documents

Teams can apply shareable documents across multiple locations within their subscribed/enrolled properties. For example, a corporate benefits program documented by a policy document could apply to all locations; or a mechanical engineer involved with several locations could use the same engineer's letter of assurance to attest to the designs across those locations.

Shareable documents are uploaded by an administrator or other authorized individual into the document library for the relevant feature. This individual may assign it to one or more locations. By assigning the document to specific locations, the individual is attesting that it applies, as written, to the location(s) selected. In addition, once a shareable document is part of the document library, WELL team members may select and assign it to additional locations. Multiple documents may exist in the library for a given feature. For example, an organization may have different parental leave policies for its offices in Australia and in Japan; in such a case, the WELL team would add two policy documents for Feature C08: New Parent Support and apply each to the appropriate subset of locations.

Once the WELL Reviewer approves a shareable document, it is considered approved for all locations to which that document was assigned at the beginning of the review cycle. Location(s) which subsequently are assigned the approved document will receive credit for the relevant feature at the next review cycle.

## **Audited Documents**

Audited documents may be used to streamline documentation for groups of locations that are pursuing a feature under a consolidated documentation review. This scale is applicable when the verification method requires a detailed overview of the location-specific strategy implemented (such as through a maintenance report, architectural drawing, photographs or a professional narrative). It may also be utilized for documentation marked as "Shareable" (see *Table 2*) when the feature implementation strategy varies by location (such as through a customizable operations schedule utilized by various cleaning vendors).

Rather than submit a document demonstrating compliance at every relevant location, WELL teams may indicate the auditable features they are pursuing and await direction from IWBI as to which locations have been selected for audit. See *Auditing* and *Table 4* for details on the auditing process.

## **Individual Documents**

For any feature, WELL team members may submit the documentation relevant for a single location. For example, individual documents might be assigned if only one project location is pursuing a feature or if a location is meeting a feature in a different way than other locations. In addition, the following types of documents are *always* individual scale, since they relate to data specific to a particular location: performance test and sensor data.

## **Documentation Stages**

### *WELL Certification and WELL at scale only*

There are two stages of WELL documentation: Intent-stage and Implementation-stage.

Intent-stage documentation represents early-stage design or plans for a program, policy or operations protocol. Implementation-stage documentation represents the as-built or implemented conditions. Both stages of documentation must contain sufficient detail to demonstrate compliance with the relevant features.

Locations seeking WELL Precertification may use both Intent- and Implementation-stage documentation. WELL Certification, WELL ratings and features contributing to the WELL Score all require approved Implementation-stage documents.

When a location that has achieved WELL Precertification undergoes documentation review for certification, WELL teams do not need to submit new or additional documents for features achieved utilizing Implementation-stage documentation, provided that relevant conditions have not changed. They *do* need to submit new documentation for features that used Intent-stage documentation, since that documentation referred to a different state in the project's construction or planning process. In addition, a WELL team may pursue additional features during documentation or performance review which were not targeted during precertification and/or remove features which were targeted during precertification.

Table 3: Description of documentation type for each stage.

| Document                                   | Intent-stage                           | Implementation-stage                                      |
|--|--|---|
| <b>Letters of Assurance</b>                |  |   |
| Owner                                      | Intent-stage template                  | Implementation-stage template                             |
| Contractor                                 | Intent-stage template                  | Implementation-stage template                             |
| Designer                                   | Intent-stage template                  | Implementation-stage template                             |
| Engineer                                   | Intent-stage template                  | Implementation-stage template                             |
| <b>Annotated &amp; technical documents</b> |  |   |
| Annotated Map                              | Proposed conditions                    | Final conditions  |
| Architectural/Mechanical Drawing           | Any design phase                       | 100% CDs* / As built                                      |
| Commissioning Report                       | Intent-stage commitment                | Yes   |
| Design Specifications                      | Any design phase                       | 100% CDs* / As built                                      |
| Inspection/Remediation Report              | Intent-stage commitment                | Final*  |
| Modeling Report                            | Any design phase                       | Final*  |
| On-going Data/Maintenance Report           | None                                   | Required following initial certification                  |
| Policy Document and/or Operations Schedule | Draft                                  | Final*  |
| Professional Narrative                     | Proposed conditions                    | Final conditions  |
| Test Report                                | None                                   | Final*  |
| WELL AP Credential                         | Final*                                 | Final*  |
| <b>Performance</b>                         |  |   |
| Performance Test                           | None                                   | Undertaken by a WELL Performance Testing Agent during PV* |
| <b>Photographs</b>                         |  |   |
| Sensor Data                                | Description of sensors to be installed | Final*  |
| <b>Forms</b>                               |  |   |
| Beta Feature Feedback Form                 | None                                   | Final*  |
| Innovation Form                            | Final*                                 | Final*  |

\* NOTE: "CDs" = "Construction Documents", "PV" = Performance Verification", "Final" refers to full documentation requirements specified in each feature

## FEATURE REVIEW

During feature review, the WELL Reviewer will examine documentation and performance testing results to confirm compliance with feature requirements.

The timing and number of review cycles depend on the way the WELL team is engaging with IWBI:

- WELL Certification for single locations: up to three review cycles
  - Precertification review (optional): undertaken once the WELL team has submitted Intent-stage or Implementation-stage documentation.
  - Documentation review: undertaken once the WELL team has submitted Implementation-stage documentation, other than performance test results and ongoing documentation. If taken by the project team, photographs may be submitted with the documentation review package. Otherwise, photographs taken by the WELL Performance Testing Agent during performance testing are submitted for review as part of the performance review package.
  - Performance review: undertaken once photographs and performance test results have been submitted. Teams may combine Documentation Review and Performance Review into a single submission.
- WELL at scale: up to two review cycles per subscription year, including documentation for any locations seeking WELL Precertification and results from any performance testing.
- WELL ratings: one review cycle per enrollment year.

Additional review cycles may be scheduled for a fee and are subject to WELL Reviewer availability.

Each review cycle includes up to two rounds of review. After documentation is submitted, the WELL Reviewer will conduct round 1 review (i.e., preliminary review) and respond with comments within 20–25 business days, indicating if documentation is satisfactory and what additional information is needed. Once the project team submits for round 2 review (i.e., final review), the WELL Reviewer will respond with the results of the second review within 20–25 business days. During a round of review, if the reviewer finds any submission to be inaccurate or requires clarification or additional information to review documentation for a WELL feature part, they may issue a Mid Review Clarification (MRC). The WELL team will have a 30-business day timeline to amend existing documents or submit additional materials and respond to the MRC. If a response is not received from the project team within 30-business days the review will be resumed and returned as-is.

***Exception:** Single locations pursuing the WELL Health-Safety Rating or the WELL Equity Rating will have their documentation returned within 8–10 business days in each round, rather than 20–25 business days.*

If any additional rounds of review are required, additional fees will apply. Additional rounds of review will be completed within 20–25 business days of submission. To avoid additional fees, WELL at scale WELL teams may postpone resubmission of documents requiring additional review until the next scheduled review cycle.

Once a review round has commenced, any changes made to documentation or performance testing results by the WELL team in the Platform (other than to address comments from the WELL Reviewer following a mid-review clarification) will only be considered in subsequent review rounds. For WELL at scale, once a review cycle has begun, another review cycle cannot begin until the WELL report has been returned.

Milestones are only awarded at the end of a review cycle (i.e., after the second round of review). If a location has achieved sufficient features to achieve a milestone after the first round of review, the team may elect to waive their second round of review to immediately earn the milestone.

## Auditing

*Applies to WELL at scale and WELL ratings only*

If a WELL team has indicated that locations are pursuing features using audited documentation, a subset of location-specific documentation must be submitted to check that feature requirements are being consistently met across the locations. For audited locations, the WELL team will be required to provide location-specific documentation utilizing the verification method described in the scorecard. The WELL Reviewer will not begin review until all audited location-specific documentation is provided.

In each review cycle, the audit will affect the square root (rounded down) of the number of locations using audited documents. Examples of sampling rates are shown in *Table 4*.

*Table 4: Example Rates of Auditing*

| Number of locations | Number of locations selected for audit | Percentage of locations selected for audit |
|---------------------|--|--|
| 5                   | 2                                      | 40%  |
| 25                  | 5                                      | 20%  |
| 100                 | 10                                     | 10%  |
| 200                 | 14                                     | 7%   |
| 500                 | 22                                     | 4%   |
| 1000                | 31                                     | 3%   |
| 2500                | 50                                     | 2%   |

IWBI will identify the locations for audit, with a preference of minimizing the total number of locations requiring documentation.

For example, if a group of 73 locations were pursuing all the same features in the WELL Health Safety Rating, eight locations would be required to submit location-specific documents for all auditable features –  $\sqrt{73} \approx 8$ .

If a location fails to submit passing audit documentation or otherwise meet the requirements of an audit, the location will not be awarded the feature. Additionally, further audits of additional locations may be required for that feature to be awarded to any locations included in the review cycle (additional fees may apply).

## PERFORMANCE VERIFICATION

Performance Verification encompasses two stages: onsite performance testing and performance review. First, a WELL Performance Testing Agent visits the site and conduct onsite performance testing. These results are submitted to the WELL Reviewer so that they can complete a third-party review of the onsite testing results along with any other documentation that has been submitted. The WELL Reviewer will determine whether a feature has been achieved.

Onsite performance testing includes measurements of several environmental parameters in the Air, Water, Light, Thermal Comfort and Sound concepts. During performance testing, an individual with authorized access to all areas of the location requested by the WELL Performance Testing Agent will need to be present so that testing and inspections may be properly conducted. For more information on performance testing protocols and the full list of parameters measured, see the [WELL Performance Verification Guidebook](#).

To undergo performance testing, a location must reach substantial completion of construction in all areas to be tested. For WELL Core and multifamily residential locations, this only refers to the base building; tenant spaces and dwelling units do not need to be complete. However, active construction may have a negative impact on performance testing results.

To undergo performance testing, locations – other than WELL Core and multifamily residential – must also reach 50% occupancy and at least one month must have passed since the certificate of occupancy was issued.

For WELL at scale and WELL ratings, performance testing results are submitted concurrently with documentation during the review cycle (see *Feature Review*). For WELL Certification for single locations, WELL teams may elect to complete the documentation review prior to beginning the Performance Verification process. Performance review must begin within one year of the performance tests being completed. WELL teams can set up and schedule performance testing through the Platform.

Due to the nature of performance testing, there are variables outside of the control of the WELL Performance Testing Agent that could impact the performance verification timeline. Performance testing involves analyses performed by various third-party laboratories, including for formaldehyde and other VOCs and up to 32 different water contaminants. In some cases, the analyses may take additional time. Additionally, if the results from the laboratory are outside of accepted accuracy or tolerance ranges, or if laboratory samples are damaged during shipping, additional testing may be required and could increase the performance verification timeline. Any additional testing that may be required is done to ensure the accuracy of the results and for the benefit of the WELL team.

## WELL REPORT

The WELL report will be issued after the WELL Reviewer has finished reviewing all features submitted in a review cycle. The WELL report will be available on the Platform 20–25 business days after submission of final documentation and/or performance testing results.

The WELL report includes the following:

- Description of features that have been achieved.
- If the location(s) have been awarded precertification, certification, recertification or a WELL rating.
- Organization/portfolio-wide metrics (for WELL at scale only).

If the targeted features have not been achieved, WELL teams may address these concerns and initiate a third round of review (additional fees apply) within 180 calendar days of receiving the report. This additional round may be used for appeals (addressing unmet requirements identified by reviewers) or to submit additional features for review. For WELL at scale, they may instead address these concerns during their next review cycle at no additional cost.

## AWARDS AND RECOGNITION

IWBI encourages WELL teams to promote their achievements through a variety of means and provides a suite of resources to support locations that have achieved WELL Certification and/or WELL ratings. Please consult the WELL Marketing and Branding Guidelines for more information.

### Designations for Organizations and Portfolios

Organizations are eligible to receive aggregate scoring and benchmarking across their subscribed properties. Subscribed enterprises and portfolios will be provided statistics such as average points achieved and average features per concept.

#### WELL Score

Subscribed enterprises will be provided with a WELL Score™, which is the average of the points achieved across all subscribed locations, weighted by the number of people at each location, and rounded to nearest whole number. For locations with an unknown number of occupants, teams may use default occupancy assumptions, such as those used by LEED,<sup>1</sup> BREEAM<sup>2</sup> or other sources approved by IWBI. Locations that have not met all preconditions are considered to have a maximum of 49 points.

For the purpose of calculating the WELL Score, any previously certified WELL v1 locations (including WELL v1 pilots) associated with an organization are considered to have 50 points for a Silver level of certification, 60 points for a Gold level of certification and 80 points for a Platinum level of certification. WELL v1 locations that are not certified are considered to have zero points. WELL v2 pilot projects are scored in the same way as WELL v2 projects.

The WELL Score must be based on at least five locations; enterprises without five scorable locations will not be assigned a score. New construction locations that are not yet occupied are not considered scorable. Locations representing remote workers are included in the calculation of the WELL Score.

Table 5 shows an example of how the WELL Score is calculated.

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<sup>1</sup> LEED v4 Appendix 2, <https://www.usgbc.org/credits/new-construction-existing-buildings-commercial-interiors-core-and-shell-schools-new-constr-3>

<sup>2</sup> BREEAM UK 2018, Table 7.7

Table 5: Example WELL Score (P)

| [A] Location ID<br>[B] Preconditions met?<br>[C] Optimization points<br>[D] Designation earned<br>[E] Effective points contributed<br>[F] People impacted<br>[G] Weight<br>[H] Points contributed by weight |     |    |      |              |     |       |      |
|---|-----|----|------|--------------|-----|-------|------|
| 1   | No  | 20 | -    | 20           | 200 | 7.7%  | 1.5  |
| 2   | No  | 45 | -    | 45           | 500 | 19.2% | 8.7  |
| 3   | No  | 60 | -    | 49           | 900 | 34.6% | 17.0 |
| 4   | Yes | 70 | Gold | 70           | 800 | 30.8% | 21.5 |
| 5   | No  | 35 | -    | 35           | 200 | 7.7%  | 2.7  |
| <b>Total</b>  |     |    |      | <b>P= 51</b> |     |       |      |

$$E = \begin{cases} \text{if } B = \text{yes} \rightarrow C \\ \text{if } B = \text{no} \rightarrow \min(C, 49) \end{cases} \quad (\text{Equation 1})$$

$$H = \frac{E_A \times F_A}{\sum F} \quad (\text{Equation 2})$$

$$P = \sum H \quad (\text{Equation 3})$$

## MAINTENANCE OF ACHIEVEMENTS

Teams must keep documentation and performance testing results for their locations current to ensure they accurately reflect their design, operations, policies and performance.

At renewal/recertification, the project boundary of a location may be updated (additional fees may apply for enrolled single locations if the area increases). In this case, the location will be evaluated as a whole under the new boundary – that is, the additional areas added are not evaluated for feature compliance or minimum program requirements in isolation.

### Annual Submissions

Certain features require WELL teams to submit reports on the following:

- Results of occupancy surveys
- Proof of maintenance (e.g., logs of cleaning schedules and filter replacement)
- Monitoring of environmental parameters (e.g., air and water quality)

These features generally require teams to submit documentation to the Platform on an annual basis. To remain in good standing, teams must submit the documents within 12 months of initial award (or at the renewal of a rating, if earlier) and then every 12 months thereafter. For details on reporting requirements, refer to the WELL features with verification type on-going data report or on-going maintenance report.

Failure to provide these reports within the required time frame may render a location enrolled for a rating or WELL Certification ineligible for recertification/renewal and/or result in additional requirements and fees assessed at recertification. For WELL at scale, subscribed locations that do not maintain annual submissions will no longer be considered compliant with the corresponding features.

In some cases, results from on-going monitoring of environmental parameters may be used in place of on-site performance testing at recertification. For more information on this process, see the Recertification section in the WELL Performance Verification Guidebook.

### Recertification/Renewal Requirements

*Applies to WELL Certification and WELL ratings*

At recertification or renewal, WELL teams must submit all on-going documentation and other annual submission requirements, as described in feature language.

Teams must note if there have been any changes since their initial award and provide documentation for any changes that would have an impact on feature compliance.

At this point, teams may also elect to demonstrate achievement of new features in place of features no longer being pursued or to advance toward higher levels of certification. All newly pursued features require full documentation.

WELL Certified locations and those renewing the WELL Performance Rating must provide updated testing results, which involves on-site testing by a WELL Performance Testing Agent or submission of data from permanently installed sensors. Depending on the extent of changes to the space, the location may be eligible for reduced sampling during re-testing. For more information on this process, see the Recertification section in the WELL Performance Verification Guidebook.

For teams applying WELL ratings to multiple locations using documentation subject to audit, IWBI will select the subset of locations for audit. The selected locations will need to provide individual-scale documents for the features that require audit.

## Timeline

### *WELL Certification*

Certification is valid for three years. WELL teams must file an application for recertification on the Platform no later than three years after the date on which the location was awarded its initial certification.

Filing an application for recertification extends the validity of the original certification period for 12 months, during which time the location must satisfactorily complete the recertification process. Upon successful recertification, the location's certification will be extended by three years from the initial date of expiration. For example, if the first recertification was completed 3 years, 8 months after the initial certification, the location will be WELL Certified until six years after initial award, not three years after the recertification was completed. In the unlikely event that recertification was completed more than six months before the original expiration date, the three-year extension will instead be based on the date recertification is achieved.

### *WELL Ratings*

WELL ratings are valid for one year from the date of award. WELL teams must file an application for renewal on the Platform no later than one year after the date on which the location was awarded the WELL rating.

Filing an application for renewal extends the validity of the location's original rating period for three months, during which time the team must satisfactorily complete the renewal process. Upon successful renewal, the rating will be extended by one year from the initial date of expiration. For example, if the first renewal was completed 13 months after the initial rating, the location will be rated until two years after initial award (24 months), not one year after the renewal was completed (25 months after initial award). In the unlikely event that renewal was completed more than six months before the original expiration date, the one-year extension will instead be based on the date renewal is achieved.

## Failure to Recertify/Renew

A location's certification/rating will expire or be subject to revocation upon the occurrence of one or more of the following circumstances:

1. The WELL project team does not file an application for recertification/renewal before the expiration of the original certification/rating period.
2. The project location fails to successfully recertify/renew within the additional time granted by filing the application (i.e., within 48 months of receiving the previous [re]certification or 15 months of receiving or previously renewing the rating).
3. The project location undergoes a change impacting certification/rating status, including but not limited to:
  - a. Physical location (e.g., a company's office changing to a different building, a structure being relocated to a different address)
  - b. Ownership or, for owner-occupied project locations, occupant (e.g., sale of a building, a new company occupying an office space) unless a transfer of ownership form is completed and submitted to IWBI
  - c. Substantial disassembly or demolition

Project owners are required to notify IWBI if any of the above changes take place.

Locations with a revoked or expired certification or rating status will be removed from IWBI's list of certified/rated locations. The team and other related parties may make accurate, non-misleading statements about the historical achievement of WELL Certification/rating in a previous year. However,

no party may refer to these locations as WELL Certified/Rated, use any other intellectual property of IWBI (Including display of a WELL plaque or seal), make any misleading statements, or indicate, suggest or imply (as determined by IWBI in its reasonable discretion) that the location is currently WELL Certified/Rated. See the WELL Marketing and Branding Guidelines for more information.

## Changing WELL Versions

For the initial recertification/renewal event, a team may elect to use either the version of WELL for which the location achieved initial certification/rating or any newer version.

For recertifications/renewals taking place six years following an initial award (and every six years thereafter), the location must upgrade to the version of WELL released 12 months prior to the expiration of the certification/rating (or a more recent version). If that version of WELL is in pilot, teams may instead upgrade the location to the non-pilot version of WELL released 12 months prior to expiration of the certification/rating.

## Feature Reverification

*Applies to WELL at scale*

Approved documentation and performance testing results are valid for three years from the date of approval as indicated in the WELL report. Six months prior to the expiration, the program administrator and each administrator for locations awarded that feature will be notified that the document or performance testing result is nearing its expiration and requires feature reverification. Submission of documentation for reverification of the relevant features is due in the review cycle which follows the three-year anniversary of its last approval. If a document is not successfully reverified at this time, it will expire.

For a document to remain valid, the team must affirm the submission remains accurate as applied to the denoted set of locations. Alternatively, teams can update any documents and affirm the updated strategies are in place for the denoted set of locations.

The Platform will indicate if any documents or performance testing results have expired. If a document has expired, any associated features are no longer considered to be met. Teams can renew or replace expired documents and/or testing results during future review cycles to achieve the features again.

Feature reverification impacts the WELL Score and other benchmarking since the number of points achieved by each location contributes to the score.

### Recertification and WELL at Scale

Feature reverification also supports recertification for individual locations within the subscribed properties. At the three-year anniversary of a location's WELL Certification, its certification status will be automatically renewed so long as its features are based on active (non-expired) documents and current performance testing results. A location's WELL Certification will not expire while a review cycle is in progress.

### Rating Renewal and WELL at Scale

Feature reverification also supports renewal of ratings for any subscribed properties. At the one-year anniversary of a location's rating award, each location's rating status will be automatically renewed so long as its features are based on active (non-expired) documents and current performance testing results (as applicable). A location's rating will not expire while a review cycle is in progress.

## ALTERNATIVE STRATEGIES

WELL aims to include a set of universally applicable features that are feasible across different regions, populations, sectors and properties. However, the ways in which the built environment may impact health and well-being across diverse contexts are varied and overlapping.

In recognition of the complexity and nuance involved in addressing health and well-being for different organizations and contexts, WELL provides alternative ways to meet a feature's intent:

- Alternative adherence paths (AAPs) are used by teams wishing to implement a different approach than what is outlined in an existing WELL feature.
- Equivalencies are used by teams wishing to use standards, codes or regulations more appropriate to their local market than those explicitly referenced in a WELL feature.

### Alternative Adherence Paths (AAPs)

WELL allows for alternate solutions for meeting requirements in WELL through the AAP process. Proposals must meet the feature intent and be supported by cited scientific, medical and/or industry research. WELL teams may propose an alternative for any feature by submitting an AAP through the Platform. AAPs must be submitted as part of or prior to the second round of documentation review. AAPs submitted after the return of the WELL report are counted as an additional round of review and subject to additional fees (see *Feature Review*).

Each AAP submission must pertain to one feature and there is no limit on the number of AAPs that can be submitted per location. For a given location, teams may have only one AAP under review per feature. Unless an AAP for a feature has been reviewed and returned to the team, another AAP for the same feature may not be submitted for the same location.

Teams that wish to receive feedback on an Innovation proposal (see the Innovation section in the digital standard) prior to a review cycle may submit the proposal as an AAP. Depending on the amount of documentation provided, it is possible that the innovation *strategy* will be approved but additional documentation is required for the feature to be awarded.

The ruling for the AAP will be updated on the Platform within 15 business days after submission. If a clarification or additional information is required, a Mid Review Clarification request (MRC) will be issued. The team will have ten business days to respond to the Mid Review Clarification; otherwise, the AAP will be issued based on the information provided within ten business days of the deadline. The AAP ruling will be issued within ten business days of the MRC response.

Each engagement type receives a set number of free AAPs; additional AAPs may be submitted for a fee. The number of free AAPs available varies depending on the enrollment type:

- WELL Certification: three free AAPs, plus three more at each recertification
- WELL ratings: three free AAPs, plus three more at each renewal
- WELL at scale: ten free AAPs per year

After submission of any AAP, a team may retract a submission by submitting a request through the support tab of the Platform. The AAP submission will not be counted toward the free AAPs if the request to retract is received within 48 hours of the original submission.

If an AAP has broad application, the strategies described may be published as a pre-approved AAP for use by other WELL teams. Pre-approved AAPs may be used as part of documentation submission without submitting an additional AAP application; WELL teams should simply refer to the published AAP in the documentation submitted for that feature.

For WELL rating enrollments with multiple locations and WELL at scale, an AAP may be applied to more than one location so long as the strategy proposed is identical across all locations. Some AAPs may require additional location-specific documentation, which will be indicated in the ruling.

## **Equivalencies**

Equivalencies are used by teams wishing to use standards, codes or regulations (collectively referred to as "programs") more appropriate to their local market than those listed in a WELL feature.

For such cases, IWBI accepts proposals for equivalencies that may be used in place of the program referenced in WELL. Proposals must identify the specific program in the WELL feature language to be replaced and include evidence of equivalency. Equivalency may be established based on technical alignment or when the program submitted represents significant leadership in the local market.

All approved equivalencies will be published online and made available to other locations as an alternative means to satisfy the feature. Teams are automatically approved to use the most recent versions of references in WELL features or published equivalencies and do not need to submit a new equivalency proposal.

## USE OF PROJECT INFORMATION

Pursuit of WELL milestones and a WELL Score require the submission of extensive information including but not limited to location- and owner-identifying information, attestations, narratives, data, calculations, maps, drawings, specifications, performance data and other design, construction and operations-related information. Submissions may contain proprietary information, and by submitting this information, IWBI and its affiliates and their respective employees, agents, representatives and contractors are granted consent to access and view all information that is submitted in the application as necessary to perform an assessment and otherwise as consistent with this Guidebook and any written agreement with IWBI.

Further development of the WELL program depends upon the collection, analysis and distribution of the aforementioned location- and owner-identifying information. IWBI and its affiliates may make internal use of any information that is submitted to IWBI – whether by a public or private location (see below) – and may publish this information in an aggregated non-identifying form to third parties, including the general public.

For instance, IWBI may publish feature achievement data, aggregated across all public and private projects, or may publish the global average WELL Score of all organizations, using the scores and sizes of all enrolled organizations regardless of their public/private status. Information that may be used from a private organization will be non-identifying and will only be published if there are at least five organizations in the cohort being described.

### Public Status

Project locations and organizations enrolled in WELL are by default considered “public” projects and, as such, they are included in IWBI’s public directory. Inclusion in this directory allows the general public and members of the media to look up (and IWBI to be able to confirm) specific listings and details, including the following: name, address, engagement type and date, identity of the owner, owner organization type, WELL team information, project area, date of certification or rating and level of certification achieved (if applicable). IWBI and its affiliates will not distribute or publish any submitted plans, drawings or other documentation submitted with respect to any location (other than to perform an assessment) without permission.

Public enrollments and subscriptions may benefit from publicity opportunities. For example, IWBI may use location/organization data to create project profiles highlighting features achieved, reference on the website or to the media, or create other related works. Information that may be used for articles, project profiles, presentations or similar promotional pieces may include service providers, WELL team members, promotional or other project photographs, project strategies for certification, and quotations from team members.

### Private Status

A team may opt-out of the WELL directory and publicity opportunities by electing their location(s) and/or organizations to be “private” at the time of enrollment. See the Platform for specific instructions in this regard.

A private location means that the name, street address and identity of the owner will not appear within the WELL project directory. Certain other non-identifying information may be disclosed, including, but not limited to, the city and state/region of the location and the total project area, and/or used in aggregated materials and resources in a manner that does not identify the location.

For WELL at scale, organizations elect for their subscribed properties to be public or private upon enrollment in the program. An organization with private status will not have its name, project inventory

or owner identity appear within the WELL organizational directory. If an organization is private, it cannot market or represent itself to the general public as being part of the WELL program, and no IWBI intellectual property may be used or displayed, including the WELL Score.

When a private location achieves WELL Certification or a WELL rating, the team will be prompted upon issuance of award to transition to public status. A team that wishes their location to remain private will need to re-confirm its private status at this time. For so long as a location is identified as private, it may not be marketed or represented to the general public as having applied for certification or as being certified, and no intellectual property including the WELL seal or plaque may be utilized or displayed in relation to the location.

A public organization may opt out of having its WELL Score publicly disclosed by IWBI. In this case, the organization will be listed at the end of any list sorted by score and the score itself will be listed as "private". Public organizations with private scores cannot market or represent their scores publicly. A public organization may also designate each subscribed location as either public or private. See the Platform for specific instructions. The status of the subscribed locations can be changed to public at any point by the owner.

Once an organization or location has been designated as "public", it may not later be set as "private" because the information has already been made available to the general public. If it is determined, according to IWBI's reasonable discretion, that a private organization or private location has been or is being marketed to the public as being enrolled in WELL, having achieved certification or a rating, or listing their WELL Score, then, following notice to the owner, that organization and/or those locations will be deemed public.

## GLOSSARY

**Alternative Adherence Path (AAP):** Substitute solution for meeting the intent of any WELL feature. Projects may submit an alternative adherence path (AAP) proposal to IWBI to replace any requirement in WELL.

**Document library:** Part of the WELL digital platform where feature documentation and performance testing results are stored for review.

**On-going documentation:** Requirements such as testing results and maintenance logs that must annually be submitted to maintain certain features. This documentation is not required at initial feature award but is required as part of the recertification/renewal process.

**Performance testing:** On-site component of the WELL process wherein an independent WELL Performance Testing Agent assesses data on environmental parameters. To collect data, the WELL Performance Testing Agent may conduct tests, collect samples and submit results to labs.

**Precertification review:** An optional review phase for locations enrolled for WELL Certification prior to Documentation Review during which WELL teams may submit documentation on the early-stage designs and operational commitments. A WELL Reviewer evaluates documentation submissions during this phase and successful locations are awarded the WELL Precertification designation.

**Regular occupant:** An individual who spends a total of 30 or more hours – across five or more days – per month within a project location.

**Review cycle:** Review period that encompasses preliminary and final rounds of review for documentation and/or performance testing results. For WELL Certification, review of performance testing results may be scheduled as part of documentation review or as a separate cycle once the documentation review is complete. For WELL at scale and WELL ratings, documentation and performance testing results are reviewed as part of the same review cycle.

**Substantial completion:** The point in the construction or renovation process (as applicable) where the project is sufficiently finished so that the owner can occupy or utilize the space for its intended use.

**WELL AP (WELL Accredited Professional):** A health and well-being credential that demonstrates expertise in the WELL Building Standard. Individuals that hold such credential must pass an examination and participate in continuing education to keep their credential and knowledge current.

**WELL Digital Platform (“the Platform”):** Official online enrollment, application and project management system for the WELL program, located at [projects.wellcertified.com](http://projects.wellcertified.com). WELL at scale administrators identify their subscribed locations in the Platform and may delegate responsibilities over specific features to other WELL team members. All documentation and performance testing results must be uploaded to the Platform for review and approval.

**WELL program:** Collectively refers to the WELL Building Standard (WELL) and versions thereof, and designations pursued related thereto (such as WELL Certification, WELL ratings and the WELL Score).

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