

C04.2 Administer Survey and Report Results - Survey administration

Technical Document

WELL Building Standard™ version 2 (WELL v2™), Q1 2021 addenda



HOW TO USE THIS DOCUMENT:

This document is intended to serve as a guide on how to create a project **technical document** to **evaluate the experience and self-reported health and well-being of building users through occupant surveys**.

This document is meant to demonstrate an acceptable degree of detail for a documentation submission. The Feature cannot be demonstrated solely through a confirmation that the requirements have been or will be implemented. The level of detail is up to the discretion of the project team, but the documents must include specific details demonstrating that the actual requirements have been enacted in the project boundary.

This document and similar tools are intended to assist projects in their pursuit of WELL v2 but use of this document and/or similar tools are in no way a guarantee of achievement of any rating or designation, and no representation or warranty is made regarding the likelihood of achieving any rating or designation.

Note: The below document is based on the Q1 2021 addenda of the WELL Building Standard™ version 2 (WELL v2™). Project teams are required to implement the feature requirements from the addenda version assigned to their project or any more recent addenda version.

FEATURE PART REQUIREMENTS:

For All Spaces

The following requirements are met:

- a. All eligible employees are invited to participate in the survey annually. Regular reminders are sent to eligible employees to complete the survey.*
- b. Survey protects all participant-identifying data through appropriate protective measures such as anonymous reporting and safe data storage. Any communication of results should be on an aggregated basis, such that no participant can be identified.*
- c. Analysis of responses is conducted by a qualified survey professional.*

WELL Core Guidance:

Meet these requirements for direct staff.



The below sample documentation is intended to provide guidance in creating a technical document. It is not a template. You may note included components that are not required to demonstrate compliance with this Feature.

Example document for Feature Part 2

The following example is for a project with fewer than 10 eligible employees.

[PROJECT'S] Survey Administration Technical Document

[PROJECT] has fewer than 10 eligible employees (there are 6). [PROJECT] is therefore not issuing a survey to meet WELL v2 C04 Part 1 requirements, and there is no associated survey administration.

The following example is for a project with 10 or more eligible employees that is pursuing WELL v2 C04 Part 1 Option 1 (or a project with fewer than 10 employees who has decided they would like to pursue WELL v2 C04 Part 1 even though it is not required.)

[PROJECT'S] Survey Administration Technical Document

Below is a summary of the methodology for administering WELL v2 C04 Part 1 surveys:

1. Eligible employees are notified by email by the survey provider [SURVEY PROVIDER NAME] and through the monthly corporate meeting one month in advance of the date that the survey will be issued. On the date that the survey begins, each eligible employee is emailed a link to the survey. Once the survey is issued, eligible employees are sent daily reminders to take the survey until either they have taken it, or the window to take the survey has closed (2 weeks after the survey opened).
2. [SURVEY PROVIDER NAME] ensures that survey results protect participant's identity and privacy through the following channels:
 - a. Surveys do not require occupants to fill in their name or any identifying information.
 - b. Submitted surveys are encrypted to ensure confidentiality and privacy of responses.
 - c. Surveys are housed on [SURVEY PROVIDER'S] protected servers until data from an entire project is collected and aggregated and a report is issued. After which, they are deleted.
3. Here is contact information for [PROJECT'S] customer support representative at [SURVEY PROVIDER] and a link to [SURVEY PROVIDER'S] website demonstrating their credentials for survey analysis: [INSERT WEB LINK AND CONTACT INFORMATION].

The following example is for a project with 10 or more eligible employees that is pursuing WELL v2 C04 Part 1 Option 2 (or a project with fewer than 10 employees who has decided they would like to pursue WELL v2 C04 Part 1 even though it is not required.)

[PROJECT'S] Survey Administration Technical Document

Below is a summary of the methodology for administering WELL v2 C04 Part 1 surveys:

1. All eligible employees will be notified by email by [PROJECT'S] office manager [NAME AND CONTACT INFORMATION] one week before surveys are administered. Paper surveys will be left on each eligible employee's desk with a note requesting that they be filled out and returned to a file next to [NAME OF OFFICE MANAGER'S] desk. [OFFICE MANAGER] will send daily reminder emails to staff to fill out surveys and give a count of how many are still outstanding until the two-week window to fill them out has passed. If at that time, less than [%] surveys have been received, [OFFICE MANAGER] will continue to send daily emails until at least [%] of surveys are received.
2. Surveys are anonymous and there is no line for people to enter their names or any identifying information, including location of workstation. Surveys are dropped off in a file next to [OFFICE MANAGER'S] desk and locked in a drawer overnight to ensure privacy.
3. [NAME] in human resources has received extensive training on how to handle confidential documents. As part of their degree, they also took a course called [NAME OF COURSE] in survey administration and analysis. They will be able to run a statistical analysis to produce meaningful analysis results and a report with results that will go to ownership and the facilities team for review. Here is their contact information: [INSERT CONTACT INFORMATION].

TIPS FOR MULTIPLE LOCATIONS

- Organizations participating in WELL Portfolio or the multiple projects pathway can submit a Guideline for this feature part, as well as a technical document for each audited project. This Guideline must outline the feature requirements, at minimum, and it can be shared across multiple projects as a means to provide guidance for compliance. A subset of audited projects must also each submit their own technical document that demonstrates compliance with the feature requirements.