



Feature C02: Integrative Design

Part 1: Facilitate Stakeholder Charrette

WELL v2™ pilot
Q1 2020 addenda

How to use this document:

This document is intended to serve as a guide for creating the professional narrative required for Part 1: Facilitate Stakeholder Charrette of Feature C02: Integrative Design. This document is meant to demonstrate an acceptable degree of detail for a documentation submission. The level of detail is up to the discretion of the project team, as long as all parts are sufficiently addressed.

- Part 1: A professional narrative outline and examples have been provided.

Note: The variable items are highlighted in yellow throughout the document.

The text is updated to the Q1 2020 version of WELL v2 pilot, which may vary from future versions of WELL v2.

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FEATURE C02: INTEGRATIVE DESIGN

PART 1: FACILITATE STAKEHOLDER CHARRETTE EXAMPLE PROFESSIONAL NARRATIVE

- A. Our project has identified all project stakeholder groups in the list below:
- a. <<Insert Owner name>>
 - b. <<Insert Building Manager name and company>>
 - c. <<Insert Facilities Management Team names and company>>
 - d. <<Insert Wellness Consultant name and company>>
 - e. <<Insert Investor names and companies>>
 - f. <<Insert Architect names and company>>
 - g. <<Insert Engineer names and company>>
 - h. <<Insert Occupant names and company>>
 - i. <<Insert Resident names and companies>>
 - j. <<Insert Vendor names and companies>>
 - k. <<Insert Human Resources staff names and company>>
 - l. <<Insert Workplace Wellness Staff staff and company>>
 - m. <<Insert other significant stakeholder's names and companies>>
- B. Our project has performed the following action(s) in order to inform project goals and strategies to meet stakeholder expectations.
- a. *Example: The project administration team hosted a meeting with all stakeholders in attendance where stakeholders were provided a list of wellness values present throughout the WELL features (for example: air quality, water quality, lighting quality etc.). Stakeholders were then asked to identify which wellness values were most crucial to include in the project goals. Once each stakeholder offered his/her insight, this information was used to select which features our project decided to pursue; this is reflected in our WELL scorecard.*
 - b. *Example: The project administration team provided a mandatory survey to stakeholders asking each person to rank 10 prescribed wellness priorities on a scale of 1-5 (1 being the least important and 5 being the most important). The project management team then averaged the values for each predescribed wellness priority ensuring that each feature related to a wellness priority that ranked above a 3 average was reflected in the WELL scorecard.*
 - c. *Example: The project administration team has asked all stakeholders to prepare a 10 minute presentation outlining their top three wellness priorities. The WELL project administration team then compiled a list to ensure that at least 1 of each of the stakeholders' priorities was reflected in the WELL scorecard.*
- C. Our project has adopted the following procedure(s) to ensure the engagement of new stakeholders who will join the project after the initial meeting.
- a. *Example: The project administration team has prepared written onboarding materials such as identifying the implementation status of features with the WELL digital scorecard. Along with the scorecard, the new stakeholders will be given a list of wellness priorities for the project and information regarding which stakeholders elected to prioritize that value. Finally, the new stakeholders will receive the relevant meeting minutes from all meetings previous to his/her joining.*
 - b. *Example: The project administration team has curated online modules made available to the new stakeholder outlining each of the related wellness priorities*

reflected in the WELL scorecard. The modules identify which wellness priorities are included as the project goals, and list existing stakeholders who elected to include each wellness priority.

- c. Example: The project administration team has prepared an onboarding meeting where it will walk the new stakeholder(s) through a powerpoint presentation outlining the project goals and the WELL scorecard.*
- D. Our project has set future meetings to stay focused on the project goals, to develop a plan of response to stakeholder feedback and to maintain a record of response.
 - a. Example: Scheduled quarterly meetings with all stakeholders offering an evaluation of how the project is carrying out the previously identified project goals and wellness priorities, with meeting minutes accessible to all stakeholders and dedicated parts of each meeting agenda given to outlining the plan of response to stakeholder feedback.*
 - b. Example: Monthly meetings to discuss progress on project goals, with meeting minutes provided to all stakeholders identifying the project team action items that are planned in order to service the previously identified project goals and wellness priorities.*
 - c. Example: Planned quarterly email blasts outlining what actions the project has taken towards maintaining its stakeholder-identified wellness goals outlined in our WELL scorecard, with bi-monthly meetings to check in on progress toward previously identified project goals and priorities and a designated notetaker at each meeting who shares meeting minutes with the group.*