



Feature C03: Occupant Survey

Part 2: Administer Survey and Report Results

WELL v2™ pilot
Q1 2020 addenda

How to use this document:

This document is intended to serve as a guide on how to create educational materials required for Part 2: Administer Survey and Report Results of Feature C03: Occupant Survey. This document is meant to demonstrate an acceptable degree of detail for a documentation submission. Ultimately, the level of detail is up to the discretion of the project team, as long as each of the requirements is sufficiently addressed.

- Part 2: 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 the WELL v2 pilot, which may vary from future versions of WELL v2.

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FEATURE C03: OCCUPANT SURVEY

PART 2: ADMINISTER SURVEY AND REPORT RESULTS EXAMPLE PROFESSIONAL NARRATIVE

At <INSERT PROJECT NAME> surveys are administered and reported according to the following conditions:

- A. Surveys are administered <<INSERT FREQUENCY, ANNUALLY AT MINIMUM>>.
 - a. *Example: annually on the second Monday in January.*
 - b. *Example: during the first quarter of each year.*
 - c. *Example: bi-annually (once in the summer and once in the winter) because our team likes to have more data than WELL requires in order to better inform our internal wellness team and inform their bi-annual goal-setting exercises.*
- B. All eligible employees are invited to participate in the survey. Regular reminders are sent to eligible employees to complete the survey.
 - a. *Example: Employees are invited to participate in the survey through a calendar invitation, blocking out 20 minutes within their schedule.*
 - b. *Example: Each employee will receive an email with a link to the survey and then email notification reminders every three days during the survey administration period or until their survey is completed, whichever comes first.*
 - c. *Example: Surveys include both our full-time and part-time staff. We will administer surveys in hardcopy at the next full-team meeting and collect them at the end of the meeting to ensure a high response rate (note, team members are asked not to include their names so that surveys may remain anonymous). Our HR manager will manually enter results on behalf of the team.*
- C. The survey protects all participant-identifying data through appropriate protective measures such as anonymous reporting, and any communication of results is on an aggregated basis such that no participant can be identified.
 - a. *Example: The surveys are hard copy and do not ask for the name of the applicant or any other identifying data. An anonymous box will be kept open for participants to deposit their survey, similar to voting boxes. Data is summarized based on anonymous reporting. If you have any concerns or questions about this study, please contact <<NAME, TITLE>> at <<ORGANIZATION>>.*
 - b. *Example: All answers are confidential. There will be no linking of responses to individuals. We will include the following language on each survey: Please do not write your first or last name anywhere in the document. All data will only be reported in aggregate (all together) and anonymously, and any potentially identifying data will not be disclosed to any party other than <<survey provider/analyst>>. The use and storage of this data follows all applicable regulations and standards including <<Fill in as appropriate: i.e. European, Internal Review Board (university), other>>. Only <<indicate who or what organization>>, will have access to the raw data from the survey and this will not be passed or shown to any third party, including the owner of the building, or other institutions. Should researchers wish to use this data for further research they must follow all data use regulations and protocols, including obtaining explicit permission from the project and participants to use this data. The aggregated data will be used for improving <<ORGANIZATION'S>> understanding of occupant experience and building performance purposes and to improve our understanding over resident perception. Aggregated data will be sent to the International WELL Building Institute annually for benchmarking, research purposes*

and to help with the continual improvement of the WELL Building Standard and related offerings and programs. If you have any concerns or questions about this study, please contact <<NAME, TITLE>> at <<ORGANIZATION>>.

- i. Example: The survey was sent out to <<NAME>> listserv through an anonymous link in an email that was administered by qualified personnel. Survey responses will not be connected with participant email addresses. No questions were asked that could easily identify participant identity; should any responses risk participant identity (for example, only one person of a specific gender and ethnicity and age), these answers were aggregated with other answers so as not to reveal any identifying data. Reminder emails were sent to this listserv with the survey link. All responses were collected by <<NAME, TITLE>> who followed appropriate data use procedures. These include: <<COMPLETE BASED ON PROJECT SPECIFIC INFORMATION>> Data is stored on <<NAME>> server, with back-up, and procedures in place designed to protect data from unauthorized disclosure All analysis was done by <<NAME, TITLE>> following all appropriate <<Fill in as appropriate: i.e. European, Internal Review Board (university), other>> data use protocols regulations. Participants were given the name and contact information of someone to contact should they have any concerns or questions about the study.

D. Analysis of responses is conducted by <<INSERT QUALIFIED PERSONNEL OR A QUALIFIED THIRD PARTY>>

- a. Example: <<NAME, TITLE>> created, administered, collected, analyzed and reported on the survey data. <<NAME>> has experience with survey design and implementation <<EXPLAIN EXPERIENCE>>, and experience with survey analysis and reporting <<EXPLAIN EXPERIENCE>>. <<NAME>> followed procedures <<give examples if different from above>> designed to protect participant data and identity.
- b. Example: Our HR manager who is trained in managing sensitive information conducted the analysis of the results and aggregated the data in a report format that could be shared. All results were captured anonymously and cannot be traced back to individual responses.

E. Aggregate results from the survey are reported annually and submitted through WELL Online.

- a. Minimum reporting requirements include descriptive statistics for the survey. Additional analysis is welcome and encouraged, but not required to meet the minimum reporting requirements.
- b. Note: The following guidance can be used to draft an annual submission, but it is not required to be included in the professional narrative submitted at the time of preliminary documentation submission:
 - i. Descriptive statistics for every question (required).
 - ii. Response rate (percentage of total population that responded), including differences by sociodemographic variables, with age and gender at a minimum (optional).
 - iii. Basic cross-tabs analysis for at least 10 variables of interest; such as percentage of women vs men satisfied with thermal comfort; age and perception of health status, etc. (optional).
 - iv. Summary narrative of key findings and results (optional).

- v. Caveats of any limitations of the data or circumstances that may have affected participant response rate and/or responses (optional). Graphical representation of key findings (optional).
- c. Note 2: Generalization of findings should only be done if standard statistical parameters have been met by a qualified professional, and if outlined in the professional narratives above.