

# PX1 Part 1 Occupant Survey – Option 1

## Policy and/or Operations Schedule

WELL Performance Rating™, Q4 2022 addenda

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### WHAT IS THIS DOCUMENT:

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

This document and similar tools are intended to assist projects in their pursuit of the WELL Performance Rating™ 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 Q4 2022 addenda of the WELL Performance Rating™. Project teams are required to implement the feature requirements from the addenda version assigned to their project or any more recent addenda version.

### HOW TO USE THIS DOCUMENT:

- ☐  Read the [below feature requirements](#) (or the feature requirements from the [addenda version assigned to your project](#), as relevant) and determine how your project addresses each requirement.
  - a. If your project is a WELL Core project, read through and ensure that your project follows the “WELL Core Guidance.”
  - b. Make sure to apply the feature requirements appropriate to your project’s space types. For example, if your project has both dwelling units and other space types, ensure your project is applying the requirements under “For Dwelling Units” to the dwelling unit spaces and applying the requirements under “For All Spaces except Dwelling Units” to the other space types. Check out the [WELL Performance Rating™ digital standard](#) for the exact language on your project’s space types.
- ☐  Refer to the [below example document](#) to get an idea of how to set up your documentation.
- ☐  Collaborate with your stakeholders to gather the [relevant documentation](#) that demonstrates the project’s compliance with the feature. Some examples of relevant documentation include:
  - a. an employee manual
  - b. a maintenance log
- ☐  Create a policy and/or operations schedule using existing documentation where relevant, annotating it to clarify where feature requirements are met. Some examples of annotating include:
  - a. highlight the sections relevant to WELL requirements
  - b. circle or add boxes around particular data
  - c. add notes to confirm WELL requirements
  - d. add labels to draw attention to particular sections
  - e. provide an explanation of the connection to WELL requirements using a different colored font
  - f. check out the [WELL Documentation Annotation Guide](#) for more
- ☐  Name the document so that it is easily identifiable. Some examples for naming include:
  - a. name the document using the WELL feature code
  - b. name the document using the WELL feature name
  - c. name the document using the WELL document type
- ☐  Review the document you’ve created and ensure that all the necessary WELL requirements are fully and clearly addressed.
  - a. Note: the level of detail is up to the discretion of the project team, but the document must include specific details demonstrating that the actual requirements have been enacted in the project boundary. Features cannot be demonstrated solely through a written confirmation that the WELL requirements have been or will be implemented.
- ☐  Upload the document to the checklist in the WELL digital platform, after you’ve confirmed that the document fully and clearly addresses all the necessary WELL requirements.



## FEATURE REQUIREMENTS:

### **For All Spaces**

*For projects with ten or more eligible employees, the following requirement is met:*

- a. A survey is selected from the “Features C04 and C05: Approved third-party surveys” section on IWBI’s website (<https://v2.wellcertified.com/resources/preapproved-programs>).*

### WELL Core Guidance:

Meet these requirements for direct staff.



The below sample documentation is intended to provide guidance in creating a policy and/or operations schedule. It is not a template. You may note included components that are not required to demonstrate compliance with this feature.



#### **Example document for PX1 Occupant Survey – Option 1**

##### **Third Party Survey policy and/or operations schedule**

[PROJECT] is using the [NAME OF SURVEY] to fulfill PX1 Occupant Survey – Option 1 requirements.

Building manager [NAME] is responsible for managing the relationship with [NAME OF SURVEY COMPANY] and ensuring that the contract with them fulfills WELL requirements of PX1 Occupant Survey – Part 2.

#### **TIPS FOR MULTIPLE LOCATIONS**

- For organizations pursuing the WELL Performance Rating for multiple locations, policy and/or operations schedules are categorized as shareable. They may be shared across multiple projects, as long as they all meet the strategies that are outlined in the document.