

# PX1 Part 1 Occupant Survey – Option 2

## Technical Document (Shareable)

WELL Performance Rating™, Q4 2022 Addenda








### WHAT IS THIS DOCUMENT:

This document is intended to serve as a guide on how to create a **technical document** to **support evaluation of 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. a letter from a hired professional outlining services provided
  - b. the project’s floor plans
  - c. a modeling report
- ☐  Create a technical document 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 projects with ten or more eligible employees, the following requirement is met:*

- a. A survey is created that covers the topics listed in [Appendix C1 in WELL v2](#).*
- 1. General building and occupancy information, including job type or time spent in the building.*
- 2. Indoor environmental quality of air, water, light, sound and thermal comfort.*
- 3. Ergonomics, layout and aesthetics.*
- 4. Maintenance and cleanliness.*
- 5. Amenities: access to nature, views and nourishment options.*
- 6. Satisfaction with how policies and amenities impact and support healthy behaviors (e.g., physical activity, healthy eating).*
- 7. Access to and engagement with workplace wellness initiatives or offerings (e.g., physical activity incentive programs, health benefits and services).*
- 8. Employee support policies (e.g., paid parental and family leave, flexible working arrangements).*
- 9. Productivity and engagement (e.g., through measures of hours worked or motivation).*
- 10. Self-rated health and well-being.*
- 11. Standard sociodemographic information (age and gender at minimum).*

### 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 PX1 Occupant Survey - Option 2**

#### **Instructions for creation of a custom survey (to submit as a technical document)**

To achieve PX1 Occupant Survey – Option 2: Custom Survey a final draft of a custom survey must be provided for documentation. Here are example steps to draft this survey:

1. Determine the most qualified person to draft the survey. This might be a person on staff with survey writing experience, a consultant, a human resources expert, etc.
2. Draft “introductory language” for the survey. This typically will include (note the items below are best practices, they are not meant to indicate a required list of items):
  - a. The name of the entity giving the survey (e.g. name of company)
  - b. Confirmation that surveys are anonymous and private.
  - c. Directions on how to fill out and return the survey.
  - d. Information on when surveys are due.
  - e. An estimate of how long it will take to fill out the survey (e.g. “no more than 10 minutes”).
  - f. The reason for the survey (e.g. WELL Certification and health and well-being feedback to help inform improving project functionality).
  - g. How results will be analyzed and how feedback will be incorporated into the project (e.g. if surveys indicate that temperatures are too cold or hot throughout a certain area, that facilities staff will inspect the systems and make adjustments to correct the thermal comfort issue.)
  - h. How often the surveys will be administered.
  - i. Contact person for any questions, clarification, or concerns about the survey.
  - j. Information about incentives if applicable.
  - k. Statement on importance of survey.
  - l. Statement on how the survey results will be used.
3. Select a format. Here are best practices for formatting:
  - a. Ensure that font is easy to read and not too small.
  - b. If surveys call for handwritten responses, make sure that there is a large enough (“comfortable”) amount of space for a person to write a response.
  - c. Make sure that it is always clearly indicated next to each question how to respond (e.g. “circle” Yes or No).
4. Draft questions. Here are best practices for drafting questions:
  - a. Make sure that there are questions that cover the following 11 categories listed in Appendix C1. When submitting the survey as part of WELL documentation, indicate which questions cover each topic (e.g. Questions 5-9 cover “Ergonomics, layout and aesthetics”).
    - i. General building and occupancy information, including job type or time spent in the building.
    - ii. Indoor environmental quality of air, water, light, sound and thermal comfort.
    - iii. Ergonomics, layout and aesthetics.
    - iv. Maintenance and cleanliness.
    - v. Amenities: access to nature, views and nourishment options.
    - vi. Satisfaction with how policies and amenities impact and support healthy behaviors (e.g., physical activity, healthy eating).

- vii. Access to and engagement with workplace wellness initiatives or offerings (e.g., physical activity incentive programs, health benefits and services).
- viii. Employee support policies (e.g., paid parental and family leave, flexible working arrangements).
- ix. Productivity and engagement (e.g., through measures of hours worked or motivation).
- x. Self-rated health and well-being.
- xi. Standard sociodemographic information (age and gender at minimum).

It is acceptable if the survey covers additional topics that the project is interested in gaining feedback on, beyond what is required by the WELL feature.

- b. Make sure that each question is clear, concise, uses a neutral tone, and sets up the person taking the survey to give a clear answer. For example:
  - i. Clear concise question: Is the temperature at your desk on a typical day (please circle one):
    - 1. Too hot
    - 2. Somewhat hot
    - 3. Acceptable
    - 4. Somewhat cold
    - 5. Too cold
  - ii. Unclear question: List how you feel about the relative temperature on any day at your desk:  
\_\_\_\_\_.
- c. Make sure that listed survey answer options are distinct, clear and will cover the anticipated range of potential responses (e.g. “Satisfied” / “Unsatisfied” / “Not applicable” instead of “I love this” / “Everything is perfect”).
- d. Provide general definitions if concepts covered are not widely known or complex in nature.
- e. Ensure that survey questions are designed with the future steps of collection and data analysis taken into consideration. For example, an online survey with multiple choice answers that auto-tallies results and generates charts will likely provide relatively easy to analyze data automatically. On the other hand, a survey where occupants must hand-write in answers require a number of hours of work to produce data from and the data may be subject to human error.

## TIPS FOR MULTIPLE LOCATIONS

- For organizations pursuing the WELL Performance Rating for multiple locations, the technical document for this feature is categorized as shareable. It may be shared across multiple projects, as long as they all meet the strategies that are outlined in the document.