

# PX3 Utilize Pre- and Post-Occupancy Survey – 1: Pre-occupancy survey administration

## 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 **explore differences in occupant experience before and after the project's pursuit of WELL.**

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 All Spaces***

*The project or organization meets the following requirement:*

- a. *Prior to achieving a WELL milestone, administer a survey for eligible employees using the same [pre-approved survey provider\(s\)](#) that will be used for Feature PX1.*

### 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 PX3 Utilize Pre- and Post-Occupancy Survey - Pre-occupancy survey administration***

The office manager, *[OFFICE MANAGER NAME]*, for *[PROJECT]* is working with *[SURVEY PROVIDER ORGANIZATION]* to conduct the post-occupancy survey for PX1 Occupant Survey and the pre-occupancy survey PX3 Utilize Pre- and Post-Occupancy Survey. The pre-approved survey selected is *[SURVEY NAME]*.

This project is a new build office for our organization's headquarters. The pre-occupancy survey was administered to all eligible employees at a temporary workspace prior to moving into the new office space. The pre-occupancy survey was administered on *[DATE]*, prior to the project receiving any WELL achievements.

#### **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.