

PX5 Survey for Thermal Comfort

Technical Document (Individual)

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 **enhance thermal comfort and promote human productivity by confirming that a substantial majority of building users perceive their environment as thermally acceptable.**

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

A post-occupancy survey is administered at least twice a year, including once in June, July or August and once in December, January or February. For projects located in tropical regions, the survey may be administered twice a year, at least four months apart. Survey is administered at least six months after occupancy, which satisfies the following conditions:

- a. All regular occupants are invited to participate in the anonymous survey, and responses are collected from the following number of respondents:⁹⁶

Number of regular occupants	Minimum number of responses
More than 45	35% of those regular occupants
20 to 45	15 regular occupants
Less than 20	80% of those regular occupants

- b. The survey includes an assessment of overall satisfaction with thermal performance and identifies thermal comfort-related issues in accordance with either:
 1. The sample survey in Appendix T1 in WELL v2.
 2. Any survey from the “Features C04 and C05: Approved third-party surveys” section on IWBI's website(<https://v2.wellcertified.com/resources/preapproved-programs>).
- c. The results of the survey responses comply with one of the target satisfaction thresholds, as specified in the table below:

Tier	Thermal Comfort Satisfaction Thresholds
1	80% of regular occupants
2	90% of regular occupants

WELL Core Guidance:

Meet these requirements in the whole building. All regular occupants must be invited to participate in the survey. The scope of the survey may be limited to thermal conditions in non-leased spaces.



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 PX5 Survey for Thermal Comfort

Facilities manager, [FACILITIES MANAGER NAME], is responsible for conducting the thermal comfort survey which covers our employees satisfaction with their thermal comfort in our office, [PROJECT]. All regular occupants, employees of our organization, are notified by email by the [FACILITIES MANAGER NAME] and through the monthly corporate meeting, one month in advance of the date that the survey will be issued. On the date that the survey begins, all regular occupants are emailed a link to the survey. Once the survey is issued, all regular occupants are sent daily reminders to take the survey until either they have taken it, or the window to take the survey has closed (2 weeks after the survey opened).

Surveys do not require occupants to fill in their name or any identifying information.

Basic survey information for [PROJECT]	
Survey participants	[PROJECT] has 25 regular occupants, our organization's employees
Survey location	participants are surveyed about their thermal comfort experiences in our office, [PROJECT] which our organization has been occupying for 11 months
Survey cadence	survey is administered once in August and once in February

Note: Below are the results from the survey conducted in August [YEAR]. [FACILITIES MANAGER NAME] is responsible for conducting the survey again in February and uploading those results to the WELL digital platform.

Copy of thermal comfort survey - Appendix T1 from WELL v2

Please answer the following questions regarding your general thermal experience during the current heating/cooling season.

- Question 1: Please rate your satisfaction level with the thermal environment in this space:
 - Very Dissatisfied
 - Dissatisfied
 - Slightly Dissatisfied
 - Neutral
 - Slightly Satisfied
 - Satisfied
 - Very Satisfied
- Question 2: Would you prefer this area to be:
 - Cooler
 - Slightly Cooler
 - No Change Required
 - Slightly Warmer
 - Warmer

If your answer to Question 1 contains the word “Dissatisfied,” please answer the following two questions:

- Question 3: How do you generally perceive the thermal environment in this area:
 - Cold
 - Cool
 - Slightly Cool
 - Neutral
 - Slightly Warm
 - Warm
 - Hot

- Question 4: Please mark the potential source (or sources) of your thermal discomfort:
 - Inappropriate room thermostat setpoint temperature
 - Thermostat setpoint temperature being adjusted by occupants
 - Daily variations in room temperature (such as higher temperature in the afternoons)
 - Occasional variations in room temperature (such as being occasionally warm or cold)
 - Parts of the room being too hot
 - Parts of the room being too cold
 - Humidity level is too high
 - Dry air
 - Air movement is too high
 - Air movement is too low
 - Hot/cold air coming from windows
 - Hot/cold walls
 - Solar radiation
 - Local thermal discomfort (part/parts of the body being cold or hot)
 - Heat from equipment and appliances
 - Strict dress code
 - Hot/cold furniture surfaces
 - Furniture causing hot/cold thermal discomfort or sweating
 - Others

Results from a [PROJECT] thermal comfort survey - administered August [YEAR]

	Question 1	Question 2	Question 3	Question 4
Subject 1	Very Satisfied	No Change		
Subject 2	Satisfied	Slightly Cooler		
Subject 3	Slightly Dissatisfied	Warmer	Cold	Parts of the room being too cold
Subject 4	Slightly Dissatisfied	Slightly Warmer	Cool	Hot/Cold air coming from windows
Subject 5	Satisfied	No Change		
Subject 6	Very Satisfied	No Change		

Subject 7	Neutral	Slightly Warmer		
Subject 8	Very Satisfied	No Change		
Subject 9	Dissatisfied	Warmer	Slightly Cool	Inappropriate room thermostat setpoint temperature
Subject 10	Slightly Satisfied	Slightly Cooler		
Subject 11	Neutral	Slightly Warmer	Slightly Cool	Hot/Cold air coming from windows
Subject 12	Slightly Satisfied	Slightly Warmer		
Subject 13	Very Satisfied	No Change		
Subject 14	Slightly Satisfied	Slightly Warmer		
Subject 15	Satisfied	No Change		

Thermal Comfort Satisfaction Survey Report for [PROJECT]

1. Please rate your satisfaction level with the temperature in this room:

1. Please rate your satisfaction level with the temperature in this room:

Considered Dissatisfied

Considered Satisfied

Very Dissatisfied

Dissatisfied

Slightly Dissatisfied

Neutral

Slightly Satisfied

Satisfied

Very Satisfied

0

1

2

2

3

3

4

Percentage of Satisfaction = (Number of Satisfied Occupants)/(Number of Surveyed Occupants)·100

Percentage of Satisfaction = 12/15·100 = 80% [tier 1]

2. Would you prefer this area to be (based on the number of votes):

<i>Cooler</i>	<i>Slightly Cooler</i>	<i>No Change</i>	<i>Slightly Warmer</i>	<i>Warmer</i>
0	2	6	5	2

3. How do you generally perceive the thermal environment in this area (based on the number of votes):

<i>Cold</i>	<i>Cool</i>	<i>Slightly Cool</i>	<i>Neutral</i>	<i>Slightly warm</i>	<i>Warm</i>	<i>Hot</i>
1	1	2	0	0	0	0

TIPS FOR MULTIPLE LOCATIONS

- For organizations pursuing the WELL Performance Rating for multiple locations, a technical document must be submitted for each project pursuing this feature part; it is not considered shareable.