

## C02.1 Facilitate Stakeholder Charrette - 1: Stakeholder charrette

### Professional Narrative

WELL Building Standard™ version 2 (WELL v2™)

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#### WHAT IS THIS DOCUMENT:

This document is intended to serve as a guide on how to create a project **professional narrative to facilitate a collaborative project process and support adherence to collective wellness and sustainability goals.**

This document is meant to demonstrate an acceptable degree of detail for

- precertification documentation submission
- documentation submission

#### For precertification documentation submission:

To achieve WELL Precertification, project teams may submit intent-stage or implementation-stage documents for pursued features, or any combination of the two. An intent-stage document is typically a draft document that has not yet been implemented in the actual project, while implementation-stage documents describe final and implemented strategies. Intent and implementation-stage documents should be similar in terms of level of detail. For final WELL Certification documentation approval, all documents are required to be implementation -stage. To learn more about intent-stage vs. implementation-stage documentation, review the [precertification guide](#) in our knowledge base.

Intent-stage language is indicated in this sample document with **green text and in parentheses**. For an intent-stage professional narrative, the document should consist of specific strategies that the team intends to implement. This document cannot simply state that the feature requirements will be implemented; the documentation should include adequate detail such that a WELL Reviewer will be able to confirm the document complies with all of the WELL feature part requirements.








#### For documentation submission:

The level of detail is up to the discretion of the project team, but the documents must include specific details demonstrating that the actual requirements have been enacted in the project boundary. The Feature cannot be demonstrated solely through a confirmation that the requirements have been or will be implemented.

This document and similar tools are intended to assist projects in their pursuit of WELL v2 but use of this document and/ or similar tools are in no way a guarantee of achievement of any rating, certification or other designation, and no representation or warranty is made regarding the likelihood of achieving any rating, certification or other designation, and IWBI shall have no liability resulting from the use or content of this document or similar tools or resources or from any action taken or inaction occurring in reliance on this document or similar tools or resources.

Note: The below document is based on the Q2 2025 addenda of the WELL Building Standard™ version 2 (WELL v2™). 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 v2™ 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 scorecard in the WELL digital platform, after you’ve confirmed that the document fully and clearly addresses all the necessary WELL requirements.

## **FEATURE PART REQUIREMENTS**

### **For All Spaces**

*Early in the planning process for the pursuit of a WELL designation, representatives from the organization or project team (e.g., leadership, human resources, project managers) facilitate a collaborative discussion that meets the following requirements:*

- a. Includes representative key stakeholders including (as applicable):*
  - 1. Owner.*
  - 2. Facilities manager.*
  - 3. Architects and engineers.*
  - 4. Contractors.*
  - 5. Employees or other occupants.*
  - 6. Community members (if the project or organization has substantial impact on the surrounding community).*
- b. Identifies the health and well-being needs of your occupants*
- c. Identifies your organization's objectives for health promotion.*
- d. Defines goals, related to each of the following:*
  - 1. Occupant health and well-being.*
  - 2. Resilience.*
  - 3. Energy and resource management.*
  - 4. Protection of water resources and ecosystems.*
  - 5. Healthy and sustainable material cycles.*
  - 6. Community inclusion.*
  - 7. Clean and healthful local environments.*

#### WELL Core Guidance:

Meet these requirements in the whole building.

The below sample documentation is intended to provide a professional narrative for developing an effective charette. It is not a template. You may note included components that are not required to demonstrate compliance with this Feature.

### Example for Feature 2 Part 1, 1: Stakeholder charette

#### **Stakeholder Charette Goals Project Narrative for [Project]**

[PROJECT] held a Stakeholder Charette on [DATE]. As part of the charette, the attending stakeholders discussed the health and well-being needs of our occupants and used this to identify [PROJECT'S] objectives for health promotion. Stakeholders then drafted more specific health and well-being and environmental goals; the goals were discussed; and the charette coordinator facilitated the ranking of goals to identify the top goals in each section that were discussed (*intent-stage: if not all stakeholders are finalized, this charette can be held by the project owner and architect and the other stakeholders can be included once identified*).

#### ATTENDING STAKEHOLDERS:

- **Project owner:** [INDIVIDUAL'S NAME, ORGANIZATION]
- **Facilities manager:** [INDIVIDUAL'S NAME, ORGANIZATION]
- **Architects:** [INDIVIDUAL'S NAME, ORGANIZATION]
- **ROLE:** [INDIVIDUAL'S NAME, ORGANIZATION]
- **ROLE:** [INDIVIDUAL'S NAME, ORGANIZATION]

Below are [PROJECT'S] health and wellbeing needs of its occupants:

- a. *Ex: Support for employees with asthma, allergy, or other respiratory issues.*
- b. *Comprehensive access to healthcare services and facilities.*
- c. *ADA accessibility compliance throughout the project.*
- d. *Access to clean, potable water and nutritious food on-site.*

Below are the Organization's objectives for health promotion:

- a. *Ex: Have a cloud-based centralized location for all occupant health and well-being related resources that is user-friendly, updated on a regular basis and that includes an events page.*
- b. *Ex: Create a comprehensive signage program that regularly posts health promotion updates and reminders, including the use of newly installed screens in the lobbies, main hallways and elevators.*
- c. *Ex: Hold an annual health promotion day where the HR team will talk in detail on health-related policies, benefits and other programs that [PROJECT] has created to benefit occupant health and well-being.*

#### **[PROJECT'S] GOALS:**

Below are [PROJECT'S] top ranked goals related to...

- **Occupant health and well-being needs:**
  - a. *Ex: Provide a comprehensive health benefits package to eligible employees.*
  - b. *Ex: Provide a notable health and well-being experience to all visitors who pass through the space.*
  - c. *Ex: Focus on high air quality within the project to support employees with asthma and allergy issues.*
- **Resilience**
  - a. *Ex: Install flood barriers on all water-front areas within the project boundary.*
  - b. *Ex: Secure battery backups in the event of a power outage.*
  - c. *Ex: Create a space where the possibility for spread of infection (such as COVID-19 and influenza) is minimized.*

- **Energy Resource Management**

- a. *Ex: Achieve a third-party certified green certification, specifically [NAME OF RATING SYSTEM].*
- b. *Ex: Ensure that newly installed lighting is low energy use.*
- c. *Ex: Work with the engineering team to commission [PROJECT] and ensure that systems are working as intended and not wasting energy.*
- d. *Ex: Install demand-controlled ventilation in conference rooms.*

- **Protection of water resources and ecosystems**

- a. *Ex: Install a green roof on the project to reduce the project's impact on local combined sewer overflow issues.*
- b. *Ex: Install low-flow fixtures throughout the project to reduce the project's impact on local water resources.*
- c. *Ex: Install a greywater system that allows the project to reuse water for irrigating the landscaping within the project boundary*

- **Healthy and sustainable material cycles:**

- e. *Ex: Ensure that at least 50% of materials used are comprised of recycled content, reused, regional content, and / or regeneratively designed.*
- f. *Ex: Purchase 100% sustainably forested woods.*
- g. *Ex: Donate used furniture in good condition that is being removed as part of the office renovation to the local furniture resale store.*
- h. *Ex: Achieve a Zero-Waste Certification, specifically [NAME OF RATING SYSTEM]*

- **Community inclusion:**

- i. *Ex: [PROJECT]'s goal is to achieve a [LEVEL OF RATING] as part of their annual corporate sustainability reporting through [NAME OF PLATFORM].*
- j. *Ex: [PROJECT] has built out a community space that can be reserved by any community group with social equity or environmental justice as part of their mission for regular meetings and events.*
- k. *Ex: [PROJECT] has committed an area to serve as a cooling shelter for community members that do not have adequate cooling during heat wave events (defined by the local governmental health services). During these times, the auditorium will be opened up to the public and water and light refreshments will be served. A first aid certified staff member will be on duty.*

- **Clean and healthful local environments**

- l. *Ex: [PROJECT] commits to purchasing [%] of materials from local New York State MWBE (Minority and Women-owned Business Enterprises) certified companies.*
- m. *Ex: [PROJECT] commits to investing [INSERT PERCENTAGE] of profits into local infrastructure, community beautification, and local health projects.*

## **TIPS FOR MULTIPLE LOCATIONS**

- Organizations participating in WELL at scale, should indicate which locations are pursuing this feature, and then submit the specific details for the locations selected for an audit.