

C02.1 Facilitate Stakeholder Charrette - 2: Stakeholder orientation

Professional Narrative

WELL Building Standard™ version 2 (WELL v2™)

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 Q1-Q2 2024 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

Tours of the space, communicating existing building operations, maintenance, programs and policies support adherence to WELL requirements, are conducted and made available to the following groups:

- a. All stakeholders in the development process, including (as applicable) the owner, manager, facilities management team, architects, engineers, existing employees, occupants, residents, contractors and community members.*
- b. New employees during onboarding.*

WELL Core Guidance:

Meet these requirements in the whole building.

The below sample documentation is intended to provide a professional narrative.

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, 2: Stakeholder orientation

This first example is for a new construction high rise residential project.

[Company] Stakeholder Orientation at [Project]

[Company] will provide **[intent-stage: plans to provide]** a stakeholder orientation tour to all stakeholders, including the owner, manager, facilities management team, architects, engineers, employees, occupants, new residents, contractors and interested community members when the building construction is complete. Private tours will be given to new team members and new residents on a monthly basis (as applicable).

Tours are **[intent-stage: planned to be given by]** given by [NAME, CONTACT INFORMATION] from the building management office who is a WELL AP. Below is **[intent-stage: a draft of]** the tour itinerary:

[EXAMPLE] [Intent-stage: DRAFT] TOUR ITINERARY:

1. Attendees gather in the ground level activity room. A brief slide deck presentation is given that explains what WELL certification is, the rating achieved by the project and an overview of the policies and benefits available to the staff and residents.
2. Next, the tour guide leads attendees through a tour of the building, highlighting WELL design features implemented in the project, which include:
 - a. Basement amenities:
 - i. Complimentary gym available to staff and residents
 - ii. Bike storage room available to staff and residents
 - b. Ground floor amenities:
 - i. Quiet meditation room available for meditation, yoga and quiet reflection, complete with enhanced acoustical treatments, a pink noise machine, yoga mats and meditation cushions.
 - ii. A shared seating area for residents complete with artwork from local artists and indoor nature elements, including a fountain and planters with trees. Residents can use this area to “work from home,” meet with friends, etc.
 - iii. Daycare facilities located within the building to support residents and staff with childcare needs.
 - iv. Single unisex bathrooms that each include an infant changing station to support families living in the building, their visitors and also staff who bring children to on-site daycare facilities. These bathrooms also have touchless faucets, soap dispensers and towel dispensers.
 - v. A stop in the mailroom where the guide takes a minute to list materials used throughout the building with well-being attributes, such as low-VOC paints, woods with no added urea-formaldehyde, low / no-mercury lamps and easy-clean surfaces.
 - c. Employee amenities (shown on tours for new employees):
 - i. A break room for employees complete with supportive elements such as a refrigerator, reusable plates, reusable silverware, a dishwasher and microwave.
 - ii. Standing desks in the employee office and security desk.
 - iii. Ergonomic chairs and monitors in the employee office and security desk.
 - d. Residential unit amenities (tours are of the demo unit):
 - i. App that residents can use to see data from their units including temperature, humidity levels, local outdoor air quality (and an indication on whether or not it is recommended to open windows), and quarterly water quality tests taken at the building (and an indication on whether or not tap water meets the stringent WELL water quality requirements.)
 - ii. Radiant floors throughout tenant spaces.
 - iii. A guide on how to use the smart thermostat.
 - iv. Information on the air filtration provided to the space by the building.
 - v. Information on the water filtration provided to the space by the building.
 - vi. A guide on how to most effectively operate the hoods over the ovens and the exhaust fans in the

bathrooms and an acknowledgement that they exhaust directly to the outdoors for improved indoor air quality.

Rooftop terrace, available for residents and employees to enjoy. It includes many natural features, such as planters with trees, shrubs and seasonal flowers. The tour ends with a hand-out that includes a summary of the tour as well as

This second example is for an existing single-floor office project.

[PROJECT] is an existing single-floor office project. There were very minimal renovations, purchases and policy adjustments required to meet WELL requirements to achieve WELL Silver Certification. Stakeholders in the process of certification were: company ownership, employees, the landlord of the base building and the facilities engineer of the base building who operates and maintains the office's systems.

Once all minor renovations, purchases and policy adjustments were made, an office meeting was held to discuss the new adjustments to the space and point out all of the health and well-being related aspects of the project. All stakeholders were invited to the meeting and refreshments were provided. In the meeting, office manager [NAME] covered the following topics:

- What is WELL certification?
- Which features is the project pursuing?
- Which project aspects contribute to the certification:
 - Building operations and maintenance:
 - *Ex: MERV 14 filters are used in base building systems and changed in accordance with manufacturer recommendations.*
 - *Ex: Mats are provided at every entrance to capture dust and particulates off of shoes to better protect indoor air quality. They are cleaned twice daily.*
 - *Ex: Water is tested on a quarterly basis at the building level, and reports are posted on a central system that all occupants have access to.*
 - Programs:
 - *Ex: Complimentary influenza vaccines are offered annually.*
 - *Ex: Meditation sessions are held in the large conference room Tuesdays and Thursdays before work.*
 - *Ex: Healthy snacks are provided in the employee pantry.*
 - Policies:
 - *Ex: Employees are provided with comprehensive medical and mental health benefits.*
 - *Ex: No smoking is permitted within the office or on the office terrace (including e-cigarettes and vaping).*
 - *Ex: Each employee can take up to two days off to participate in volunteer activities.*
 - Design features
 - *Ex: 25% of desks have been switched out to be standing desks.*
 - *Ex: Office chairs have been replaced with adjustable chairs for better ergonomics.*
 - *Ex: Lighting in certain areas of the office has been upgraded to increase visual acuity.*
 - *Ex: A sound masking system has been installed to improve acoustical comfort in the open office area.*
- What employees can do to get the most benefit from the WELL related elements of the project:
 - *Ex: Bike to work using the local bike network. Use showers, bike storage and bike maintenance tools provided by the base building.*
 - *Ex: Sign up for the activity incentive programs and get involved!*
 - *Ex: Don't forget to use your volunteer days, here's a list of local volunteer organizations: [INSERT LIST]*
 - *Ex: Bring in healthy lunches from home and use the amenities provided in the pantry including the refrigerator, microwave and reusable plates and utensils.*
 - *Ex: Check the water quality metrics next to sinks and get inspired to stay hydrated drinking tap water! (Which is treated at a building level and tested quarterly).*

The meeting was recorded, and the recording is shared with all new employees.

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.

