

C04.1 – Option 1: Pre-approved survey

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 policy and/or operations schedule to evaluate the experience and self-reported health and well-being of building users through occupant surveys.

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 policy and/or operations schedule, the document should consist of a draft version of the policy and/or operations schedule 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

For projects with ten or more eligible employees, the following requirement is met:

- a. A survey is selected from a survey provider listed on [IWBI's website](#).*

WELL Core Guidance:

Meet these requirements for direct staff.



The below sample documentation is intended to provide a policy to select a third-party survey provider. It is not a template. You may note included components that are not required to demonstrate compliance with this Feature.



Example for Feature Part 1 Option 1 - Third-Party Survey

***[Intent-stage: Draft]* Third Party Survey**

[PROJECT] is using *[intent-stage: will be using]* the [NAME OF SURVEY] to fulfill C04.1 Option 1 requirements. Our HR director, [NAME] is responsible for managing the relationship with [NAME OF SURVEY COMPANY].

TIPS FOR MULTIPLE LOCATIONS

- For organizations participating in WELL at scale, this Policy and/or Operations Schedule 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.