

## C04.2 - Administer Survey and Report Results - Survey administration

### Technical Document

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 **technical document** 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 technical document, the document should consist of the proposed methodology and 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**

The following requirements are met:

- a. *All eligible employees are invited to participate in the survey annually. Regular reminders are sent to eligible employees to complete the survey.*
- b. *Survey protects all participant-identifying data through appropriate measures such as anonymous reporting and safe data storage. Any communication of results should be on an aggregated basis, such that no participant can be identified.*
- c. *Analysis of responses is conducted by a qualified survey professional.*

### 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 Feature Part 2

The following example is for a project with fewer than 10 eligible employees.

### [PROJECT'S] Survey Administration Technical Document

[PROJECT] has fewer than 10 eligible employees (there are 6). [PROJECT] is therefore not issuing a survey to meet WELL v2 C04 Part 1 requirements, and there is no associated survey administration.

The following example is for a project with 10 or more eligible employees that is pursuing WELL v2 C04 Part 1 Option 1 (or a project with fewer than 10 employees who has decided they would like to pursue WELL v2 C04 Part 1 even though it is not required.)

### [PROJECT'S] Survey Administration Technical Document

Below is a summary of the **(intent-stage: proposed)** methodology for administering WELL v2 C04 Part 1 surveys:

1. Eligible employees are notified **(intent-stage: will be notified)** by email by the survey provider [SURVEY PROVIDER 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, each eligible employee is emailed **(intent-stage: will be emailed)** a link to the survey. Once the survey is issued, eligible employees are sent **(intent-stage: will be 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).
2. [SURVEY PROVIDER NAME] ensures **(intent-stage: will ensure)** that survey results protect participant's identity and privacy through the following channels:
  - a. Surveys do not require occupants to fill in their name or any identifying information.
  - b. Submitted surveys are encrypted to ensure confidentiality and privacy of responses.
  - c. Surveys are housed on [SURVEY PROVIDER'S] protected servers until data from an entire project is collected and aggregated and a report is issued. After which, they are deleted.
3. Here is contact information for [PROJECT'S] customer support representative at [SURVEY PROVIDER] and a link to [SURVEY PROVIDER'S] website demonstrating their credentials for survey analysis: [INSERT WEB LINK AND CONTACT INFORMATION].

The following example is for a project with 10 or more eligible employees that is pursuing WELL v2 C04 Part 1 Option 2 (or a project with fewer than 10 employees who has decided they would like to pursue WELL v2 C04 Part 1 even though it is not required.)

### [PROJECT'S] Survey Administration Technical Document

Below is a summary of the **(intent-stage: proposed)** methodology for administering WELL v2 C04 Part 1 surveys:

1. All eligible employees will be notified by email by [PROJECT'S] office manager [NAME AND CONTACT INFORMATION] one week before surveys are administered. Paper surveys will be left on each eligible employee's desk with a note requesting that they be filled out and returned to a file next to [NAME OF OFFICE MANAGER'S] desk. [OFFICE MANAGER] will send daily reminder emails to staff to fill out surveys and give a count of how many are still outstanding until the two-week window to fill them out has passed. If at that time, less than [%] surveys have been received, [OFFICE MANAGER] will continue to send daily emails until at least [%] of surveys are received.
2. Surveys are **(intent-stage: will be)** anonymous and there is no **(intent-stage: will not be a)** line for people to enter their names or any identifying information, including location of workstation. Surveys are dropped off **(intent-stage: will be dropped off)** in a file next to [OFFICE MANAGER'S] desk and locked in a drawer overnight to ensure privacy.

3. [NAME] in human resources has received (*intent-stage: will receive*) extensive training on how to handle confidential documents. As part of their degree, they also took a course called [NAME OF COURSE] in survey administration and analysis. They will be able to run a statistical analysis to produce meaningful analysis results and a report with results that will go to ownership and the facilities team for review. Here is their contact information: [*INSERT CONTACT INFORMATION*].

#### **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.