

Implementing WELL at scale: Overview + Documentation



Apply WELL at scale

Subscribers gain access to all that WELL has to offer with:

Concierge support & premium project management platform

Pursue unlimited certifications & ratings

WELL Score to benchmark human & social capital performance



WELL SCORE



WELL CERTIFICATION



WELL RATINGS



WELL STANDARD + PLATFORM + ROADMAP + SUPPORT NETWORK

Leaderboard and awards

HIGHEST WELL SCORE

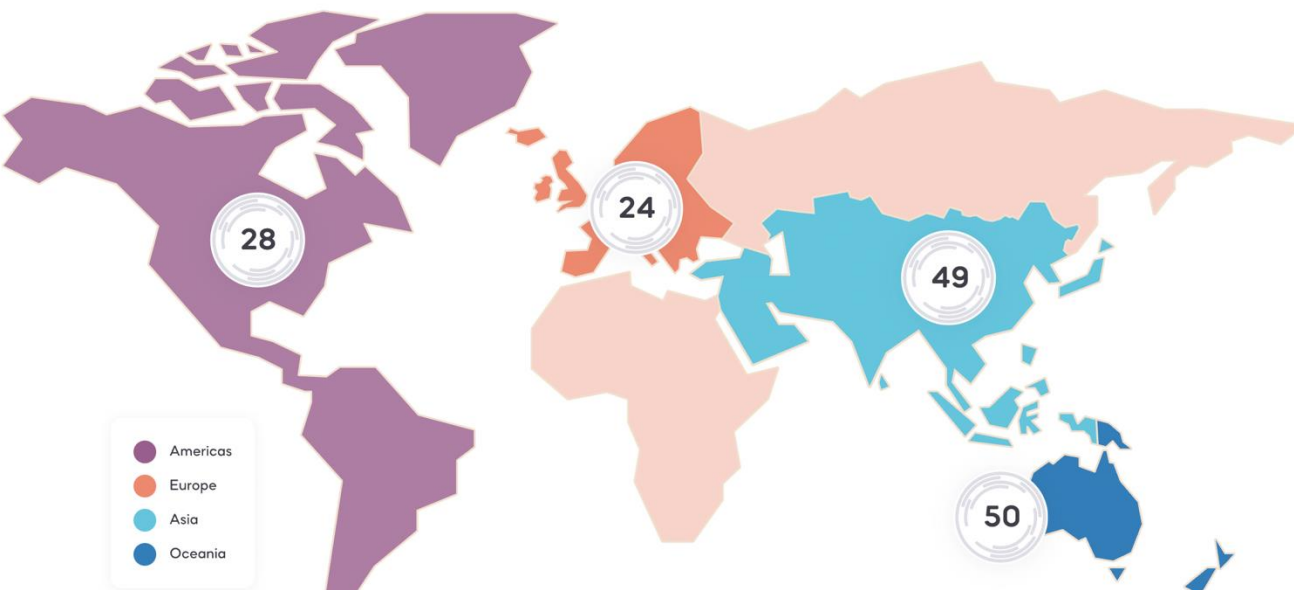
More than 100 locations



Up to 100 locations



AVERAGE WELL SCORE BY REGION



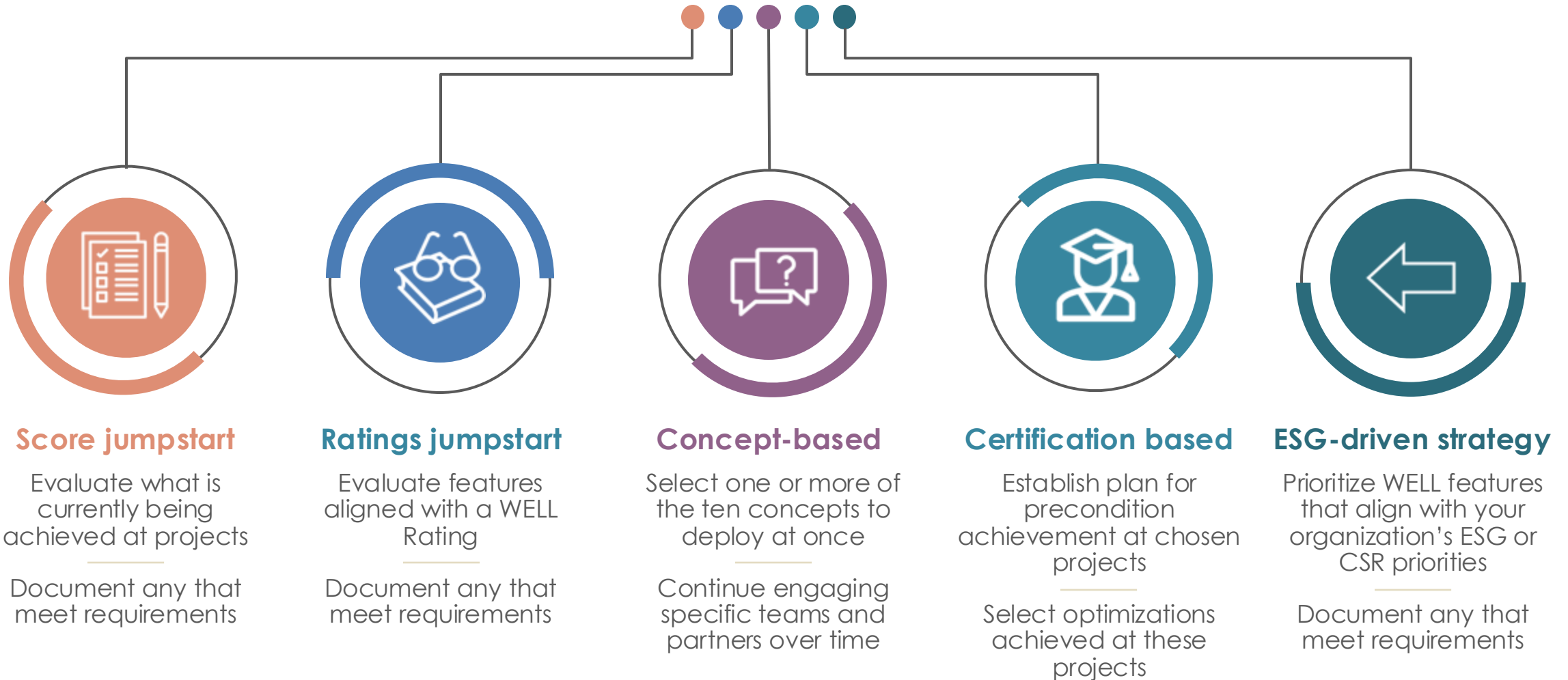
Healthier outcomes across the WELL concepts.

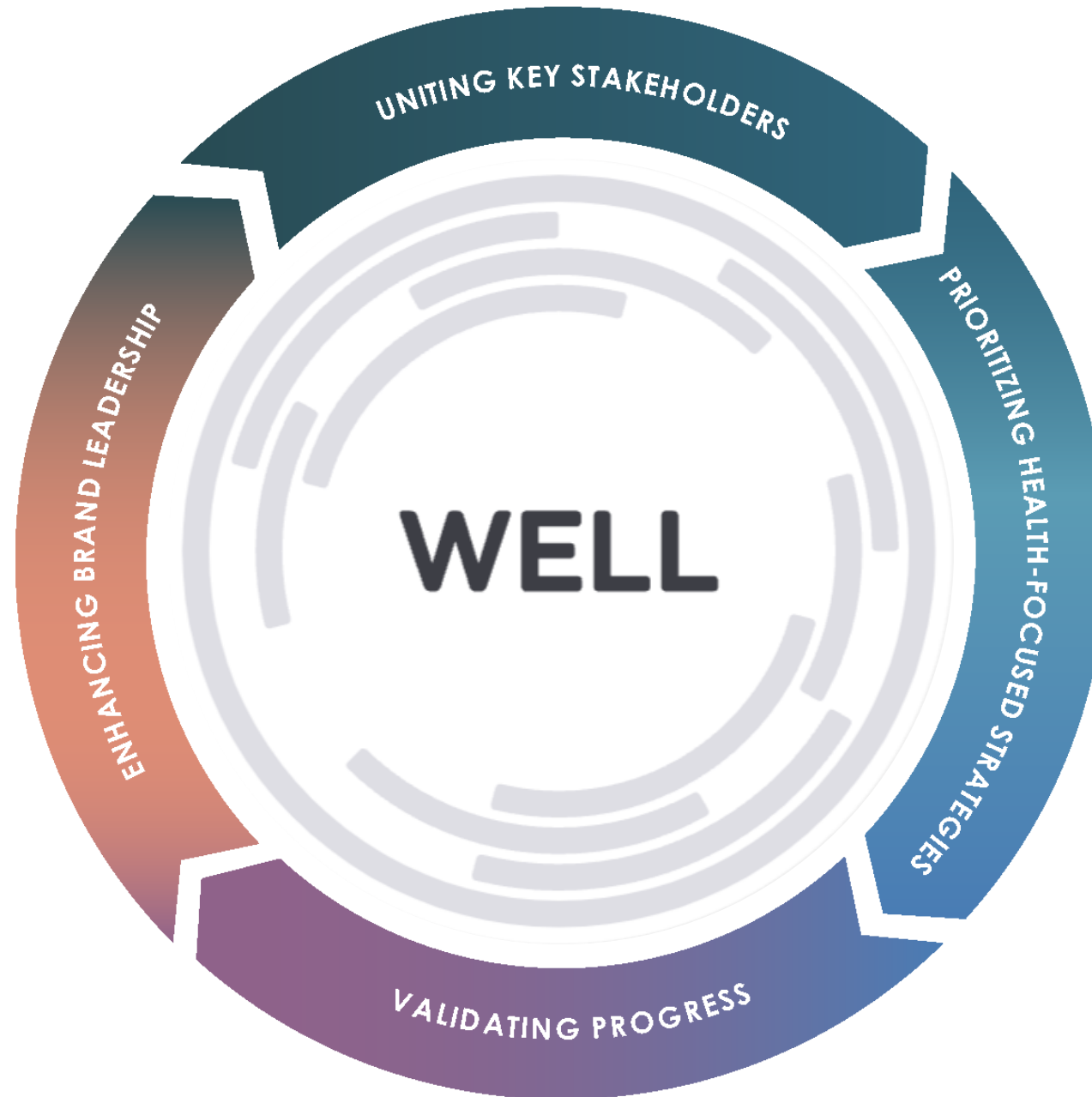
Explore key areas of impact and discover market leaders who have made significant advancements across the 10 WELL concepts:

<div>Average Points</div> <div>Award Winners</div>		
COMMUNITY		Lendlease, One International Towers Sydney Trust; and Investa, IGO managed and ICPF
INNOVATION		Ernst & Young LLP, US Office Portfolio
MIND		The Cadillac Fairview Corporation, Ltd., TD Centre
MOVEMENT		Embassy Office Parks REIT
MATERIALS		Investa, IGO managed and ICPF
NOURISHMENT		Gmp Property, SOCIMI Office
AIR		CBRE Investment Management, Dutch Office Fund
WATER		Embassy Office Parks REIT
LIGHT		Enel, LATAM Offices
THERMAL COMFORT		Edge Technologies, Europe
SOUND		Lendlease, One International Towers Sydney Trust

Approaches: Where do we begin?

Flexible approaches





Goal/strategy setting - examples



Prioritizing diversity,
equity, and
inclusion



Enhancing
sustainability
and resilience



Reducing
employee stress
and burnout

Scorecard Survey

WELL Online - **WELL Scorecard** tab

Scorecard Survey

LET'S GET STARTED!

Build your scorecard with our survey

In the categories below, you will see a total of 24 questions. To respond to each question, you should provide an estimate of which alternatives you believe your organization would support, using the designations listed below:

Select a category

Design | 12 Questions
100 / 100% complete
Select

Operations | 7 Questions
32 / 100% complete
Select

Policy | 5 Questions
12 / 100% Complete
Select

Designations

- Supportive**
Your organization either already supports the strategy or would be very likely to achieve the feature's intent
- Explore further**
Your organization may be supportive depending on the amount of effort or resources needed
- Not interested**
Your organization does not typically support spending effort or resources on these types of alternatives

TAKE ACTION

Ready for your next steps?

Once you've completed the questions in each of the categories, indicating that you are finished will close the survey and provide you with a summary of your responses.

Clicking below will also alert your coaching contact who will then coordinate a time to review the results, provide insights and outline next steps.

I'm finished. Let's chat!

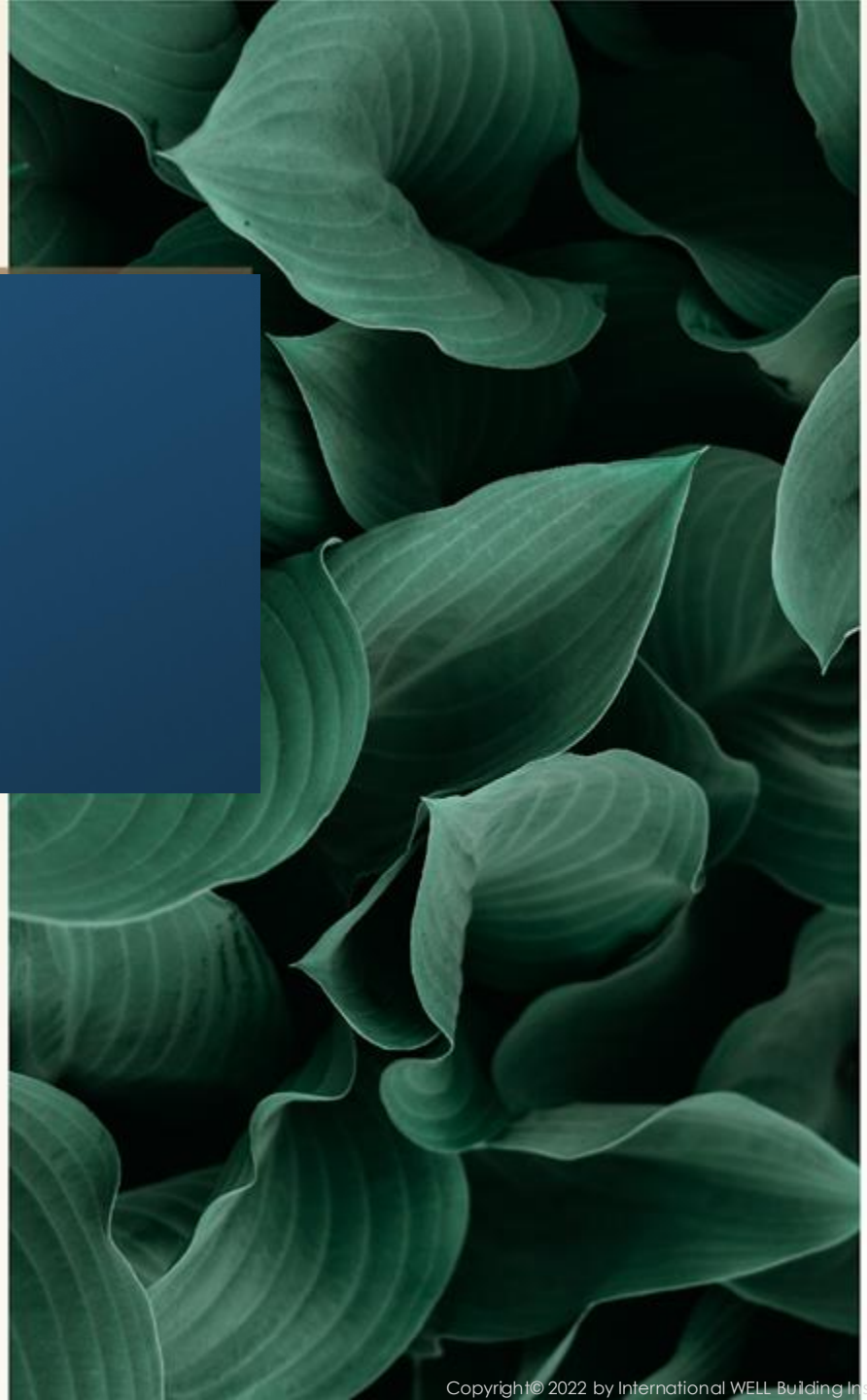
Filling out the survey is the first step in generating a recommended scorecard.

The Scorecard survey asks about approaches and strategies in **Design**, **Operations**, and **Policy**.

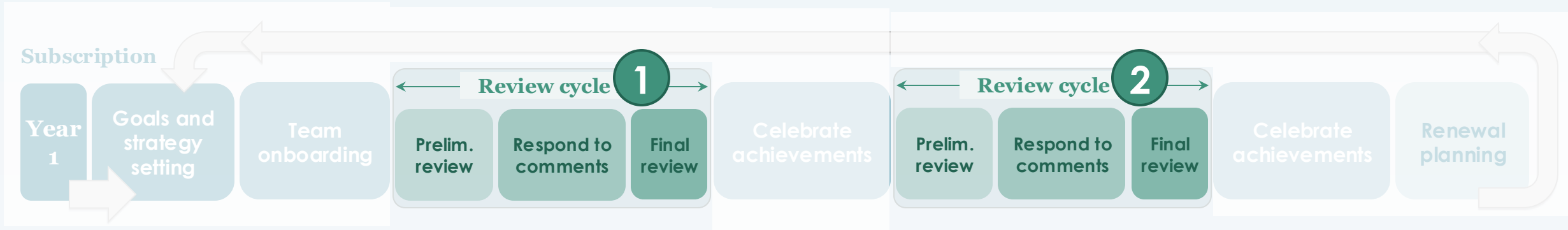
Survey responses indicate whether the organization is **Supportive**, **Not interested**, or needs to **Explore** a strategy further.

Once the survey is complete, click **I'm finished**. Let's chat! to generate the scorecard.

Validating progress



Two Review Cycles Per Subscription Year



1 Review cycle

- Compile, upload and submit documentation

Round 1
review (30-35
business days)

- Respond to comments
- Hold assessment and documentation team meeting to plan for final review

Round 2 review
(30-35 business
days)

- Receive report, celebrate results
- Hold meeting with core WELL team to discuss next steps and prepare for review cycle 2

Preparing Documentation

Gather feature-specific and general documentation.

FEATURE-SPECIFIC

- WELL features are verified through documentation and/or results from performance testing and verification.
- **Each feature part lists its required verification method(s).** See the Verification tab for more info in your scorecard.

GENERAL

- **Complete Locations** tab to include:
 - Occupancy
 - If the project is targeting any WELL milestones
 - Construction status of the project
 - Etc.

General

Review the **Locations** tab

- Updated occupancy estimates
 - Where applicable, WELL Score calculation is weighted by occupancy
- Location name, number and relevant information
 - These location names will be listed in the review sheet.
- Indication of whether the project is targeting WELL milestones in this review cycle:
 - Precertification, Certification, WELL Rating

Locations					
A member's defined portfolio should accurately reflect the portfolio's population of locations, adding and subtracting any projects that join or leave your defined portfolio at least once per year. Annual subscription fees are assessed annually based on the current size of the defined portfolio in the list below.					
Overview Subset					
<div><div><div><div></div></div><div><div></div></div></div><div><div>+ Add New</div><div>Import</div><div><div></div></div><div><div></div></div><div><div></div></div></div></div>					
LOCATION	CITY	COUNTRY	OCCUPANCY	SIZE (SQ M)	ACTIONS
9 2202255802	j	AM	3066	71215.26	<div></div>
2 2202255801	d	BD	133	3096.74	<div></div>
Test 1 2202255800	s	BH	400	9290.3	<div></div>
IWBI Test 2 2202255463	Gurgaon	IN	8	187.85	<div></div>
IWBI Test 1 2202144999	Wroclaw	PL	200	929.03	<div></div>
Showing 1 to 5 of 5 results					
<div><div><<</div><div><</div><div>1</div><div>></div><div>>></div></div>					

Occupancies and the WELL Score

Location Name	All Preconditions met?	Optimization Points	People Impacted	Impact weight	Effective points contributed	Points contributed by impact weight
Location 1	No	66	2000	15.87%	49	7.78
Location 2	No	14	4000	31.75%	14	4.44
Location 3	No	14	500	3.97%	14	0.56
Location 4	No	13	300	2.38%	13	0.31
Location 5	Yes	84	3000	23.81%	84	20.00
Location 6	No	10	0	0.00%	10	0.00
Location 7	No	0	0	0.00%	0	0.00
Location 8	No	0	2400	19.05%	0	0.00
Location 9	No	0	400	3.17%	0	0.00
Location 10	No	20	0	0.00%	20	0.00
				100.00%		33.09



AVERAGE GLOBAL
WELL SCORE




REAL ESTATE
INDUSTRY AVERAGE



NON-REAL ESTATE
INDUSTRY AVERAGE

Assessing Features and Gathering Documentation

V08.1

Provide Indoor Activity Spaces
Physical Activity Spaces and Equipment

1

YesMaybeNo

Requirements

Verification

Comments

Resources

WELL Core Guidance:
Meet these requirements in non-leased spaces. To earn an additional point, also meet these requirements in the whole building.
WELL Core projects where non-leased space represents 40% or more of total project area may pursue the additional point by making the physical activity space available to visitors without meeting these requirements for tenants. Projects utilizing this pathway should include a note on the documentation required by the feature.

All Spaces

Option 1: On-site physical activity spaces
A dedicated fitness facility is available within the project boundary at no cost to regular occupants and is sized according to one of the following requirements:

- a. The space includes at least two types of exercise equipment (e.g., free weights, treadmill) in quantities that allow use by at least 5% of regular occupants at any time.⁸
- b. The space includes at least two types of exercise equipment (e.g., free weights, treadmill) and is at least 25m² plus 0.1 m² per regular occupant, up to a maximum of 930 m².⁹

Verified by Technical Document

OR

Option 2: Off-site physical activity facilities
The following requirement is met:

- a. The project provides regular occupants access to a fitness facility within a 200 m walk distance of the project boundary at no cost.

Verified by Policy and/or Operations Schedule

TYPES OF DOCUMENTATION:

- Letters of assurance
- Professional narratives
- Policies
- Operations schedules
- Ongoing data reports
- Ongoing maintenance reports
- Forms
- Technical documents
- Performance tests
- Sensor data
- On-site photographs

Verification Types

When a feature option is selected, required documentation appears under **Tasks**.



Shareable



Audit



Individual / Property-specific

Preparing Shareable Documentation

Create, gather, and assess shareable documentation

- LOA (Owner, Contractor, Architect, MEP)
- Educational Materials
- Policy Document / Operations Schedule
- Technical Document (WELL AP credential)
- Beta Feature Feedback Form
- Innovation Form

Consider engaging the following:



Executive
leadership



Operations / Facilities
Management

Human
Resources



Building Owner, Contractor,
Architect, and/or MEP

Key Concepts:

Concepts mostly verified by shareable documentation

Consider focusing on these concepts when preparing shareable documentation.



Nourishment



Mind



Community

Preparing Audit Documentation

Create, gather, and assess audit documentation

- Annotated Map
- Architectural Drawing
- Commissioning Report
- Design Specifications
- Mechanical Drawing
- Modeling Report
- On-going Maintenance Report
- Photographs
- Professional Narrative
- Remediation Report
- Signage and Communications Materials
- Survey Materials
- Technical Document (except WELL AP credential)

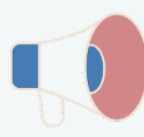
Consider engaging the following:



Contractor



Architect /
Designer



Marketing /
Communications



Developer /
Owner



Commissioning
Agent, MEP



Consultant: Facade,
Lighting, Acoustics

Key Concepts:

Concepts mostly verified by audit documentation

Consider focusing on these concepts when preparing audit documentation.



Thermal Comfort



Movement



Materials

Preparing Individual Documentation

Create, gather, and assess individual documentation

- On-going Data Report
- Performance Test

Consider engaging the following:



Operations / Facilities
Management



Performance
Testing Agent



Contractor



Commissioning
Agent, MEP

Key Concepts:

Concepts mostly verified by individual documentation

Consider focusing on these concepts when preparing individual documentation.



Air



Water



Light



Sound

Performance testing at scale

Upload Performance Testing results

- Performance Testing can occur at any point before documentation submission as long as:
 - Projects have reached substantial completion of construction in all areas to be tested.
 - Projects have reached 50% occupancy **and** at least one month has passed since the certificate of occupancy was issued.*

**WELL Core and MFR projects are exempt from these requirements.*

- Results from an approved Performance Testing Organization may be submitted concurrently with documentation.

WELL Performance Testing Organizations	
	ARP-Astrance Region(s) served: Europe Contact: Coming soon
	Ambisalud Calidad Ambiental S.L. Region(s) served: Europe Contact: Mayte Arcos (marcos@ambisalud.es)
	BEE Incorporations Region(s) served: Africa, Australia & New Zealand, India, Middle East, Central Asia, Southeast Asia and Europe Contact: beeinfo@bee-inc.com
	Catalyst Partners Region(s) served: North America Contact: WELL@catalyst-partners.com
	Branch Pattern Region(s) served: North America, South America Contact: well@branchpattern.com

View approved Performance Testing Organizations at www.wellcertified.com/performance-testing

Documentation at scale

WELL Precertification



Precertification is an interim designation for projects that have plans to achieve WELL features that are yet to be constructed or otherwise implemented.

- Allows project owners to:
 - **Publicly demonstrate** health and well-being
 - **Market** the proposed well-being features
 - **Determine** which features the project is likely to achieve
- Valid until the project achieves WELL Certification, or 5 years from the date of achievement
- **Requirements: Submit intent-stage documents for preconditions and the minimum number of points required** (NOTE: no Precert documents required for features verified by performance testing or photos)

- WELL teams can pursue Precertification for existing locations or new construction, as applicable.
- Projects may use both **intent-** and **implementation-stage** documents for Precertification.
- WELL teams seeking Precertification for a particular project must submit all **intent-stage** documents in a single review cycle. There is no incremental review or achievement of Precertification.

Documentation at scale

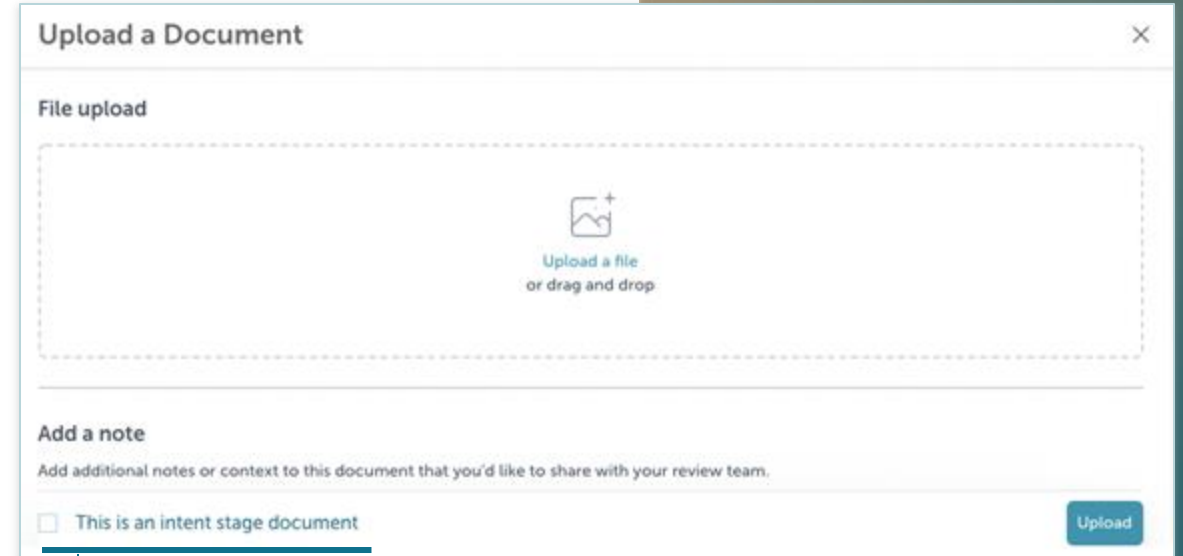
Implementation-stage and intent-stage documents

Implementation-stage documents

- To contribute to a WELL Score or to WELL Certification, documentation must be based on as-implemented conditions and/or verified in place. This documentation is referred to as **implementation-stage** documentation.

Intent-stage documents

- Precertification documentation can be based on plans for designs, operations or policies that are not yet in place. This documentation is referred to as **intent-stage** documentation, indicating plans to enact these strategies in the future.



Upload a Document

File upload

Upload a file or drag and drop

Add a note

Add additional notes or context to this document that you'd like to share with your review team.

☐ This is an intent stage document

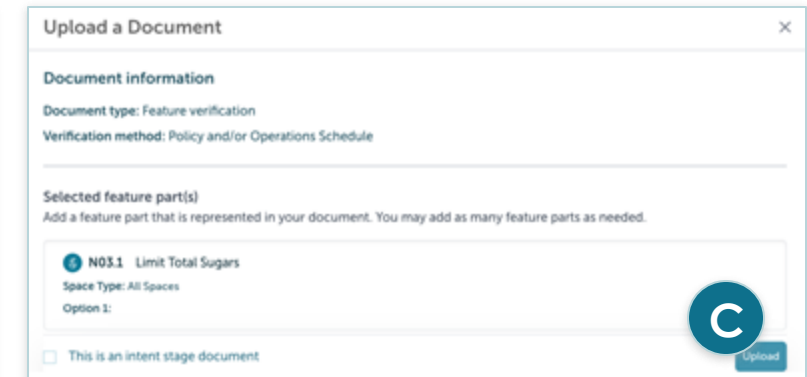
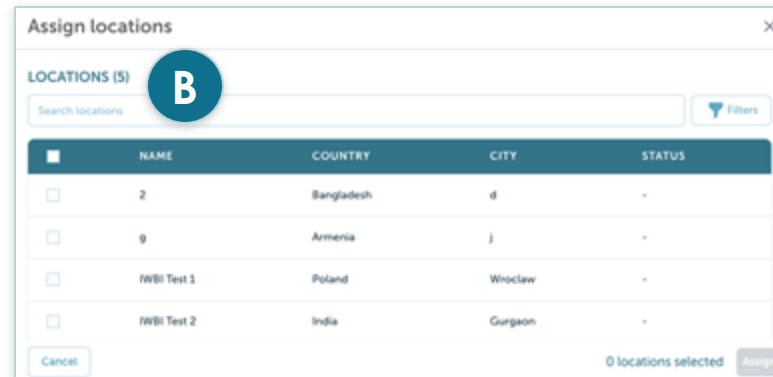
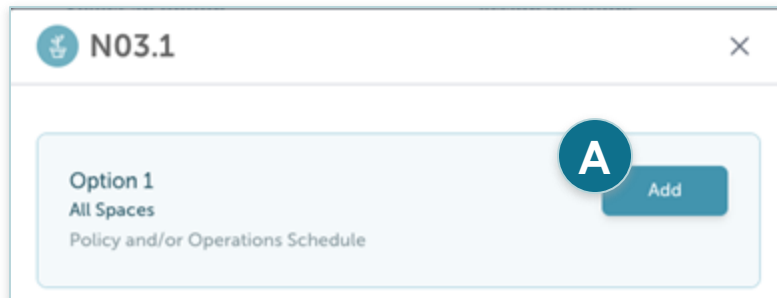
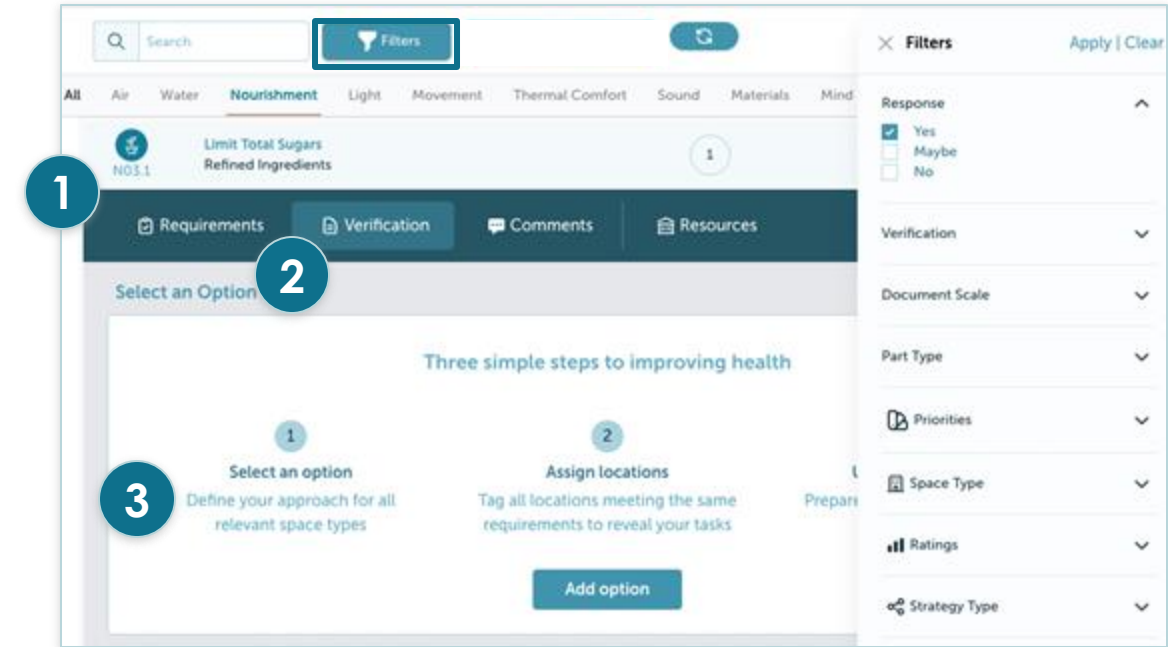
Upload

When uploading an intent-stage document, check the box to indicate if it is **intent-stage**.

Documentation uploading

Upload documents from the Scorecard

1. In the **Scorecard** tab, choose a feature. **Tip:** Filter by **Response** to only show pursued features.
1. Click the feature and go to the **Verification** tab.
1. Complete the three steps in the **Verification** tab:
 - A. Select an option
 - B. Assign locations
 - c. Upload verification



Documentation Upload

Upload documents from the Scorecard

Tasks are generated after options are selected and locations assigned. **Tasks** summarizes required uploads (based on the verification method) and tracks progress as documentation is uploaded.

4. Scroll down to **Tasks**, upload general and/or audit documents, and click **Upload**.
4. **Optional:** If the document applies to more than one feature part, click **Add feature part(s)**, select the additional applicable feature part(s), the space type and option number, then click **Add Part**. Repeat as necessary for other feature parts. Be sure to annotate the document to indicate which sections apply to which feature part!

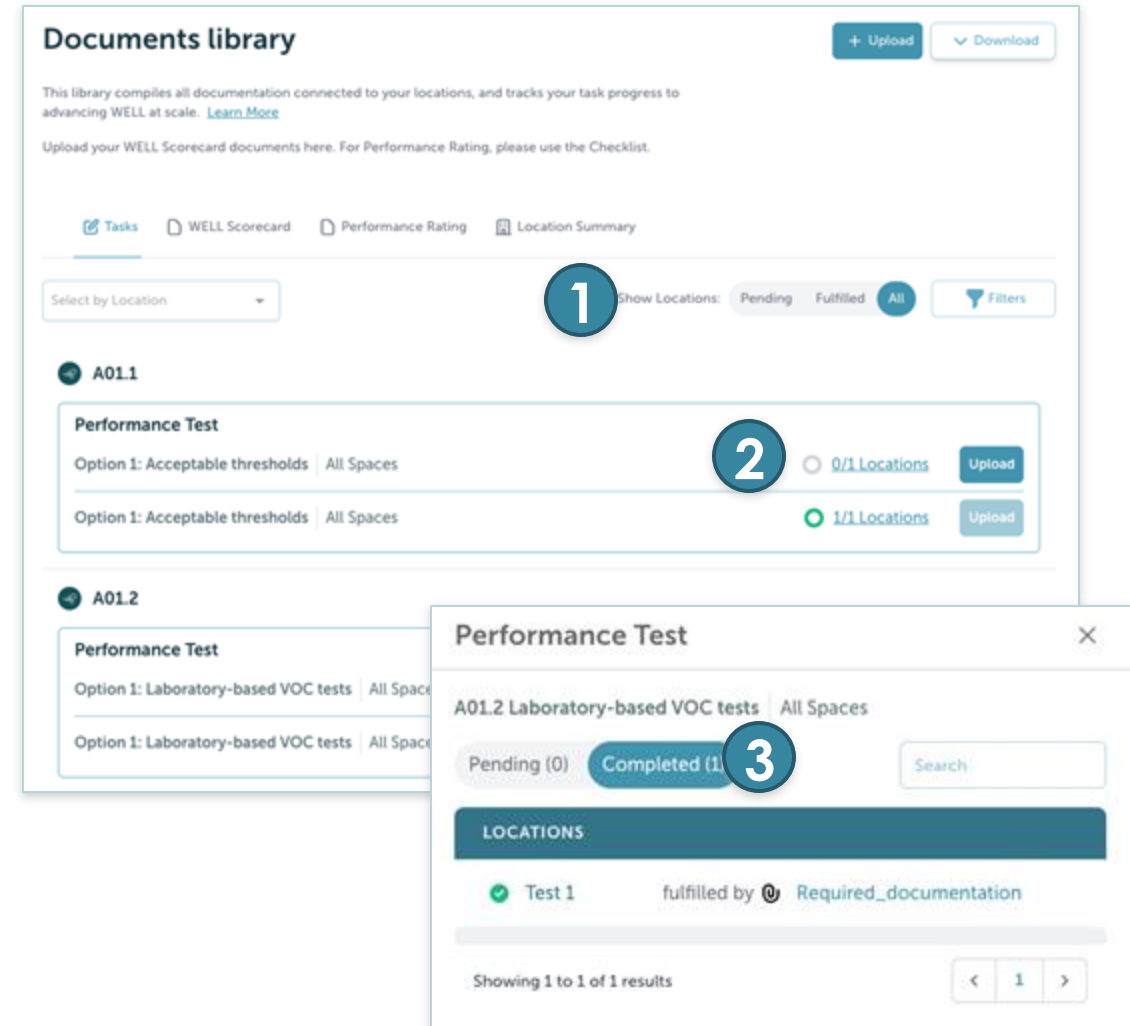
The screenshot displays the 'Limit Total Sugars Refined Ingredients' scorecard interface. The top navigation bar includes 'Requirements', 'Verification (1)', 'Comments', and 'Resources'. The 'Selected Options' section shows 'Option 1: All Spaces, Policy and/or Operations Schedule' with '2 Pursued' locations. The 'Tasks' section highlights 'Policy and/or Operations Schedule' for 'Option 1 | All Spaces' with '0/2 Locations' completed. A blue circle with the number '4' highlights the 'Upload' button in the 'Tasks' section. Below this, the 'Upload a Document' modal is open, showing a section to 'Add feature part(s)'. This section contains three dropdown menus: 'Select Feature Part' (highlighted with a blue circle and the number '5'), 'Select Space Type', and 'Select Option'. An 'Add Part' button is located below these dropdowns. At the bottom of the modal, there is a checkbox labeled 'This is an intent stage document' and an 'Upload' button.

Documents Library

Understanding document status

After assigning location(s) to a feature part and option(s), the **Tasks** section contains information about required documentation and next steps.


1. Document uploads can be filtered by status in the **Documents Library** tab.
2. Document upload status is shown by feature part and audit status (where applicable).
 - **Pending:** Documentation is required for this document, but it has not been uploaded.
 - **Completed:** Documentation has been uploaded for this feature, but it has not been reviewed.



Sample documentation + Letters of assurance

C01.1 Provide WELL Feature Guide

Policy and/or Operations Schedule
WELL Building Standard™ version 2 (WELL v2™), Q1 2021 addenda



HOW TO USE THIS DOCUMENT:

This document is intended to serve as a guide for occupant understanding of the WELL available health resources and program.

This document is meant to demonstrate demonstrated solely through a confirmation to the discretion of the project team requirements have been enacted in the project.

This document and similar tools are in no way a guarantee regarding the likelihood of achieving a target.

Note: The below document is based on the recent addenda version.

FEATURE REQUIREMENTS:

For All Spaces

1: WELL feature guide

A physical or digital WELL feature guide following requirements:

- Describes the WELL features of the project.
- Explains how the WELL features of the project's health-oriented design.

AND

2: Communications

The following requirement is met:

- Quarterly communications (e.g., newsletters) are given to all occupants available to them addressed to the project.

Designer's Letter of Assurance : W08.2

Instructions

WELL Certification is determined by onsite Performance Verification and documentation, including Letters of Assurance from the appropriate professionals overseeing the implementation of a specific WELL feature and component parts during design, construction or operations. The template should be completed, signed and submitted as part of the documentation package.

- Place a checkmark at every part completed and leave blank those that are not being pursued or being completed by another team member.
- Initial every feature completed and leave blank those that are not being pursued or being completed by another team member.
- Sign and date at the bottom of this letter.

If an individual other than the Designer is responsible for any of the requirements contained in this Letter of Assurance, he/she is permitted to sign off on the respective requirements but must complete a separate Letter of Assurance for those specific requirements. This individual should submit a different copy of this form and check the boxes as it pertains to his/her own responsibility. On his/her own Letter of Assurance form, this individual should sign and complete the final page and include a description of his/her role on the project next to his/her signature.

The scope of this letter of assurance is as follows (please initial):

WELL Precertification	WELL Certification
<input type="checkbox"/>	<input type="checkbox"/>
The information contained in this document is accurate as of current design and anticipated project operations.	This document is prepared in relation to final construction documents and/or implemented operations and policies.

Check	Water	Initials
	W08 Hygiene Support	<input type="checkbox"/>

This project is designed to meet the parts selected below:

Part 2: Enhance Bathroom Accommodations

For All Spaces except Dwelling Units:

All bathrooms meet the following:

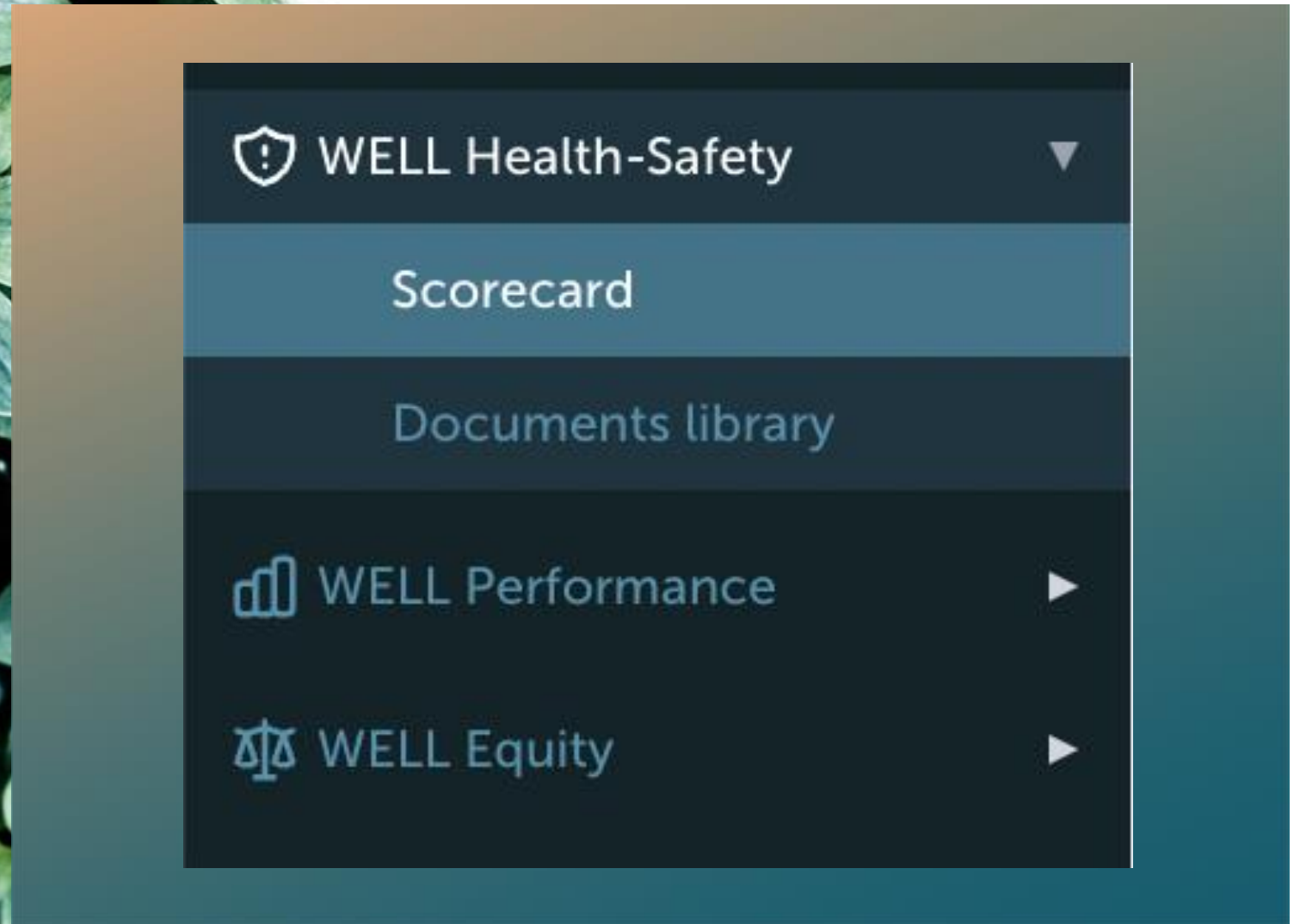
☐ a. Toilets are equipped with hands-free flushing.

- Sample documents are available in the **Support** tab for v2 and v2 pilot projects.
- Letters of Assurance (LOA) Templates can be downloaded from specific features in the scorecard.
 - Template LOAs are available for Owner, Contractor, Engineer, and Designer.
 - The person who signs the LOA is attesting that they have the knowledge or expertise to verify that those projects meet the outlined requirements.

Pursuing Ratings

First time pursuit -
Upload documents
in the Rating
scorecard

If pursuing a Rating
renewal, get in
touch with your
coaching contact



Before Submission

Complete the **WELL at scale review form**

A. The [WELL at scale review form](#) contains a checklist with links you can use to ensure your review submission has followed all of the steps we need for an accurate and complete WELL review.

B. Please complete the form in advance of your WELL review submission and send it to your coach via your Support tab so that it will be saved in your WELL dashboard.



**International WELL
Building Institute**

220 Fifth Avenue, 8th Floor
New York, NY 10001

646.883.5001

wellcertified.com

WELL at scale review information form

We're excited to get your WELL review underway! Before you submit, we have a few questions to make sure your review goes smoothly. Please complete this form before you submit for review and send to your coaching contact via a message in your WELL dashboard Support tab.

1. For this review cycle, I am submitting documents for achievement of (check all that apply):

- ☐ WELL Certification
- ☐ WELL Recertification
- ☐ WELL Precertification
- ☐ WELL Health-Safety Rating
- ☐ WELL Health-Safety Rating renewal
- ☐ WELL Performance Rating
- ☐ Pursuit of individual WELL features not tied to a location-based milestone in this review cycle

Submit Documentation

Submit for documentation review

- 1. In the **Reviews** tab, click the **+Submit Review** button to initiate documentation review.
- 2. Send the completed WELL at scale review form via the Support tab
- 3. Where applicable, previously completed and/or in-progress reviews are listed in the **Reviews** tab. Click the **eyeball** button to view details.

After the review has been initiated, the team will receive a confirmation email stating that the submission has started and the project is ready to be reviewed.

Reviews

+ Submit Review

Note: Our team will evaluate the documents submitted in this review cycle and will contact you via email if any additional documents are required for audited features. Once you have confirmed the review file is complete, the review cycle will officially begin.

After a review cycle begins, the WELL Reviewer will respond with comments within 20–25 business days indicating whether documentation and/or testing results submitted for each feature are satisfactory. The WELL Portfolio team will have an opportunity to amend existing documents or submit additional materials for a second-round review. The WELL Reviewer will respond with the results of the second-round review by issuing the WELL Report within 20–25 business days. These two review rounds are included within one complete review cycle.

REVIEW PHASE	SUBMITTED ON	STATUS	EST. REVIEW DATE	REVIEWED ON	ACTIONS
Review Cycle #1	Nov 30, 2021	COMPLETED	Jan 12, 2022	Nov 30, 2021	<div></div>

Documentation tips

1. Ensure that you have **uploaded a document for every verification method required**.
2. **Annotate documents** as appropriate. Make it clear where the WELL requirements are met.
3. Explore **already-approved AAPs and EPs** as needed.
4. **Ensure your WELL agreement is signed** and you are current in your subscription payment before submitting.
5. **Translate relevant documentation parts into English** if needed.

Documents library WELL v2

The below resources are available to your team as you prepare your WELL at scale documentation.

- [WELL at scale documentation overview](#)
- [Preparing your documentation](#)
- [Uploading your documentation](#)
- [Submitting your documentation](#)
- [Boosting your WELL achievement with shareable documents](#)
- [Documentation FAQ](#)

[Tasks](#) [Documents](#) [Location Summary](#)

Select by Location

 A01.1

Performance Test

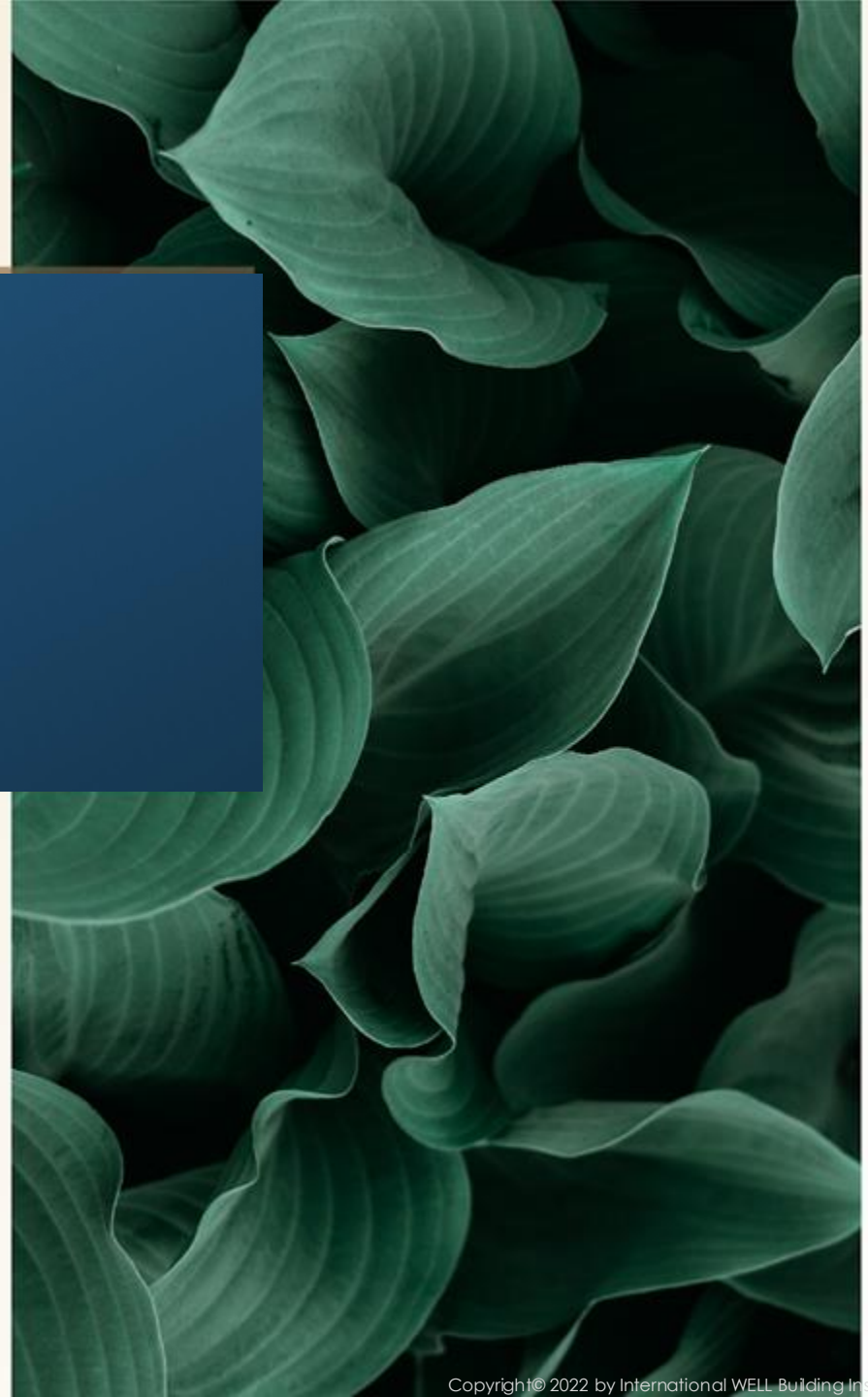
Option2: Modified thresholds in polluted regions | All Spaces

Option3: Dynamic thresholds in polluted regions | All Spaces

 A01.3

Performance Test

Enhancing brand leadership



Track progress with on-demand performance metrics and reports

26 / 100

602 locations 11 countries 3.6M m² total size

Total occupants

33,648
PEOPLE IMPACTED



23,106 EUROPE 6,209 ASIA 4,333 AMERICAS

Internal leaderboard

1	Location 57	★ 92 pts.
2	Location 430	★ 78 pts.
3	Location 25	16 pts.
4	Location 75	13 pts.
5	Location 58	12 pts.

Regional spread



Activity

2nd REVIEW CYCLE

478 DOCUMENTS SUBMITTED

91% APPROVED

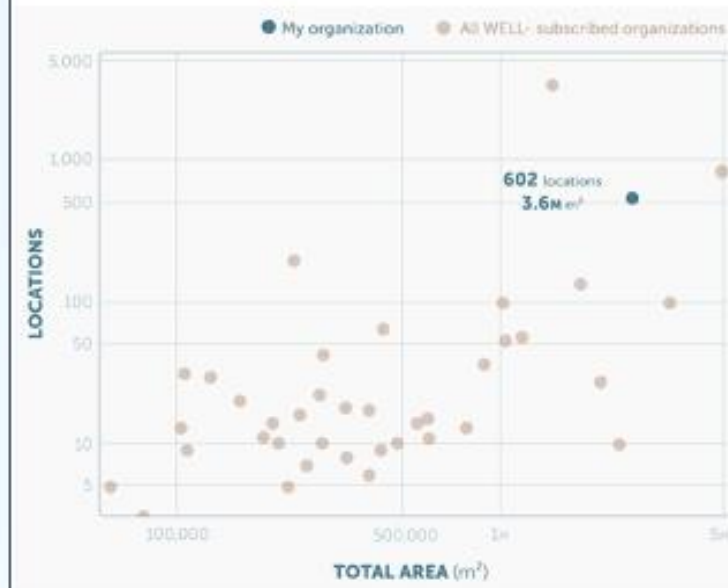
Total WELL milestones



Impact comparison

Total area vs. location count

Benchmark: all WELL-subscribed organizations with location and area data



Ranking comparison

Scale and scope

Benchmark: all WELL-subscribed members with location, area or occupancy data

top 10%

by location count
96th percentile

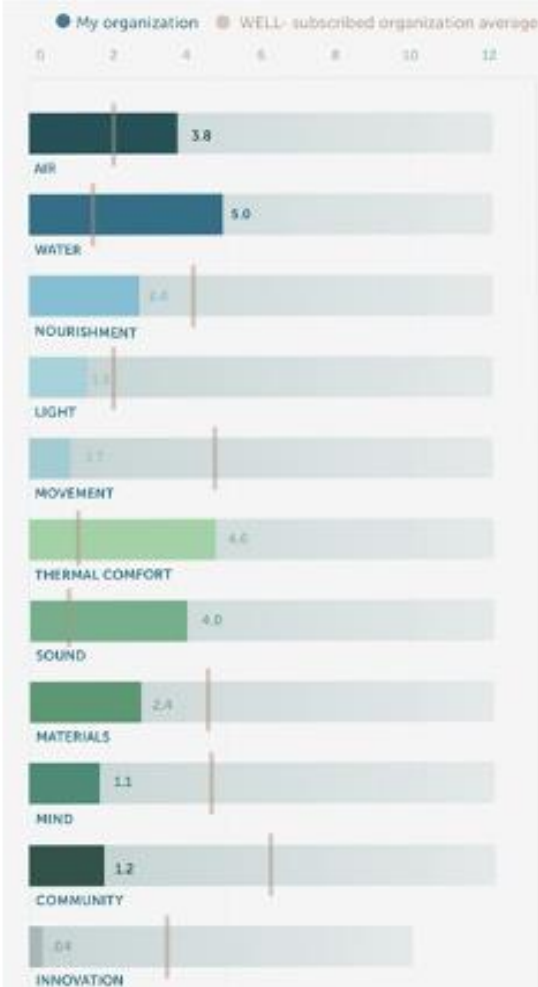
top 5%

by people impacted
97th percentile

Optimization comparison

Average point achievement across your locations

Benchmark: mean concept points of all WELL-subscribed organizations with at least one completed review

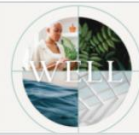


Educate stakeholders

Leverage IWBI resources to support your client's education and communication strategies.



Welcome to WELL Toolkit



Welcome to WELL Social Media Promo Kit



Email
Templates

Welcome to WELL Email template



Communicating about WELL Strategies

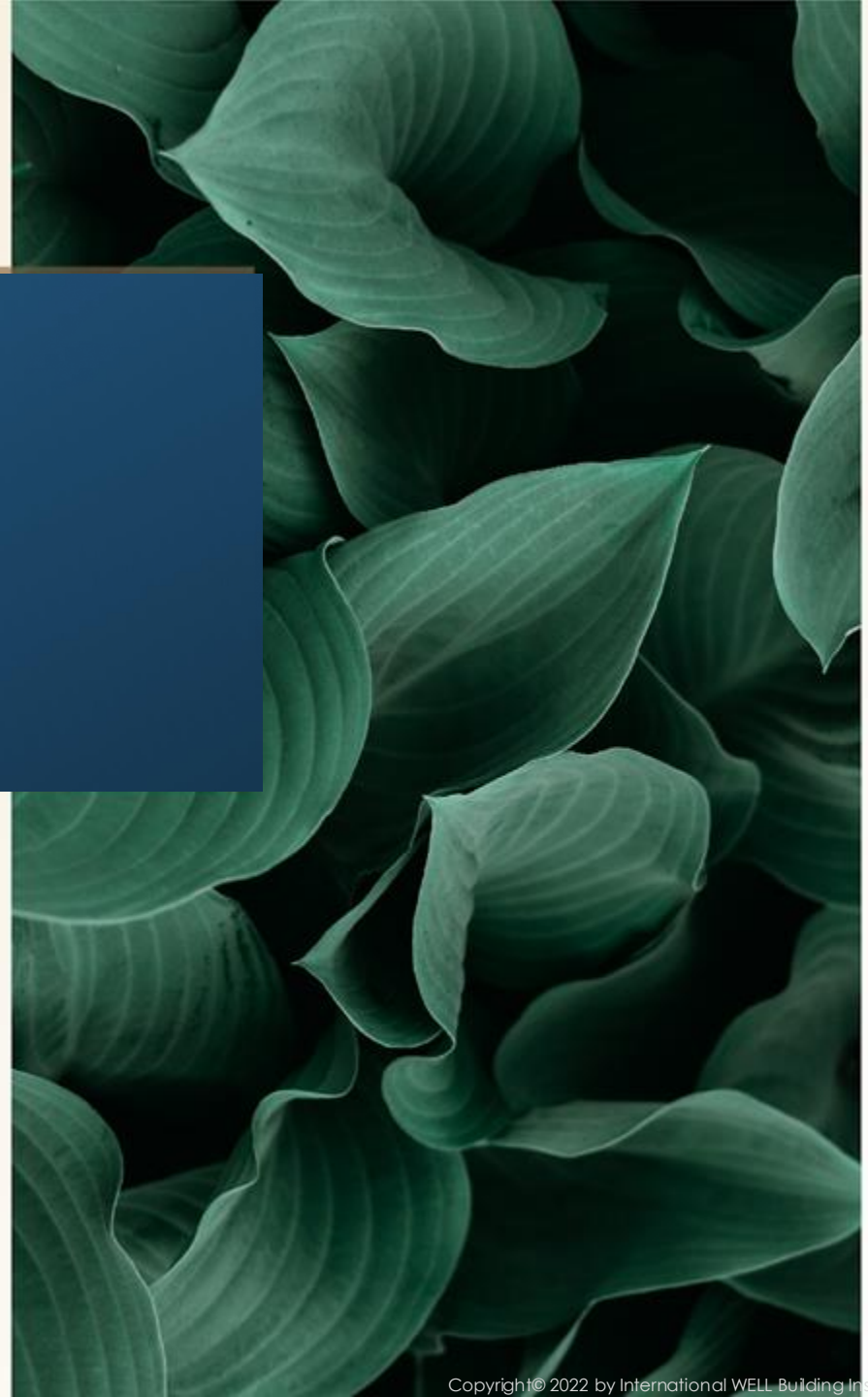


Did you know...

We spend about **90%**
of our time indoors

Social Graphics

Support and Resources



Support center

Scorecard and documents section

Your go-to for articles, guidance and toolkits to support your WELL journey, from starting out to documentation prep.

Enrolled in the WELL
Health-Safety
Rating

Scorecard and documents

Learn about verification methods, how to create documents and upload them to your account

Start the WELL documentation process



Understanding verification methods



Understanding audit documentation



Tips for preparing documentation



Use sample documentation



Use an alternative approach



Boosting your WELL at scale achievement with shareable documents



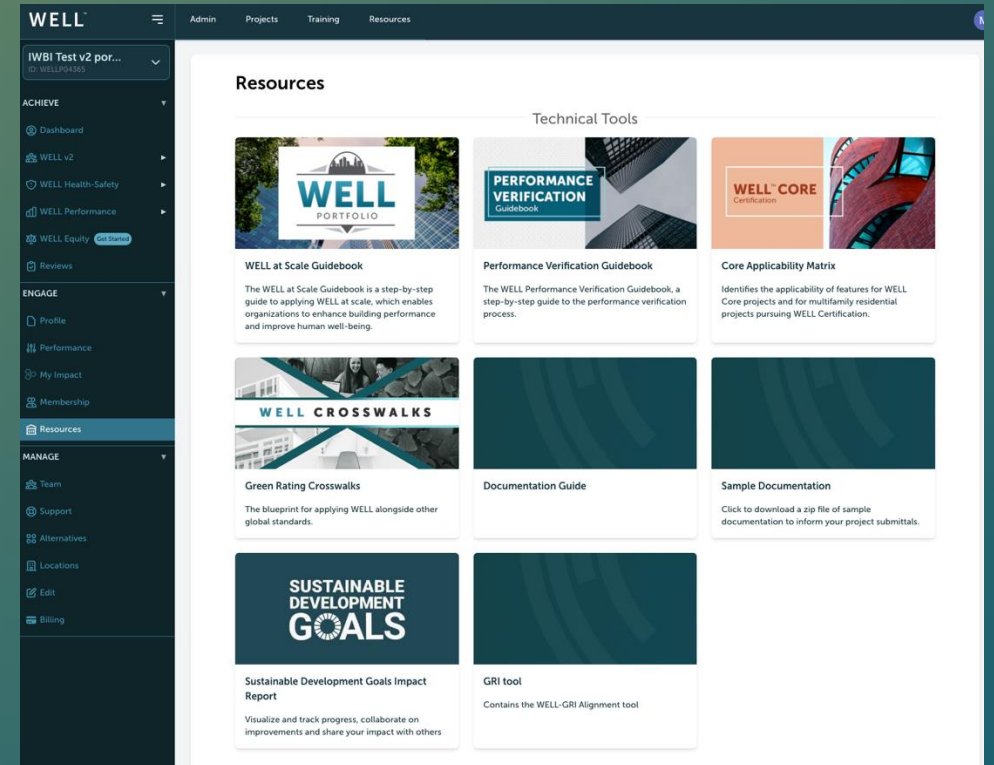
[Support center – Scorecard and documents section](#)

WELL Online

Platform resources

Including resources available only to subscribed members, such as sample documentation.

Enrolled in the WELL
Health-Safety
Rating

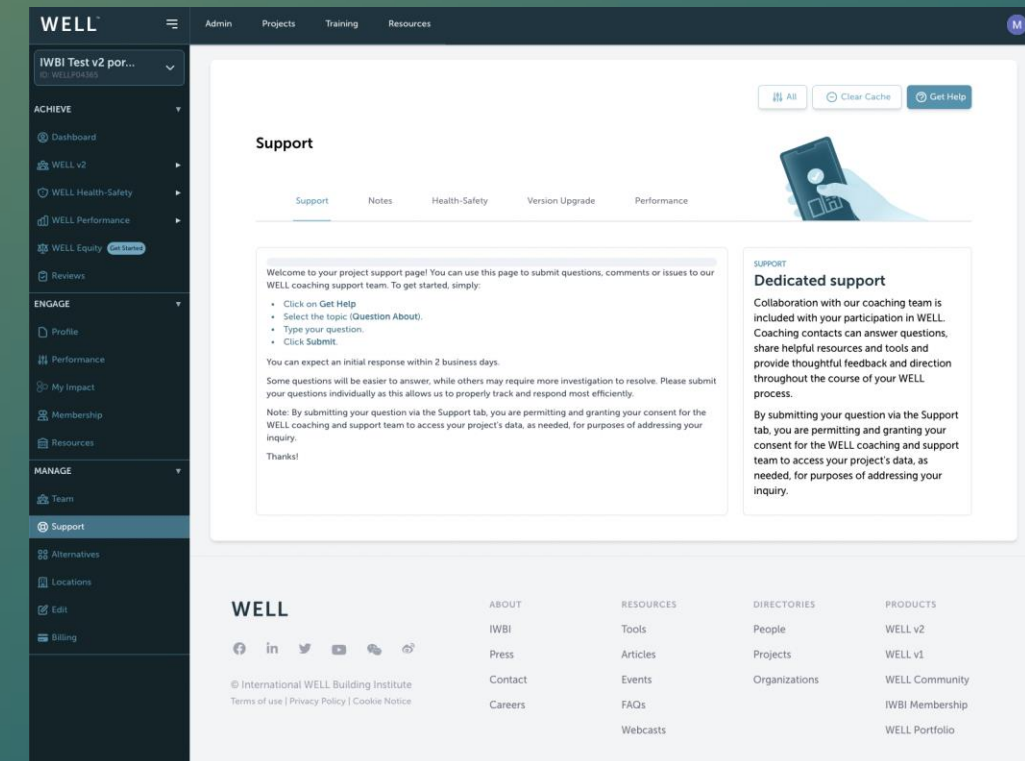


WELL Online

Support tab

Use your Support tab in your WELL dashboard once you're subscribed to communicate with your coaching contact.

Enrolled in the WELL
Health-Safety
Rating

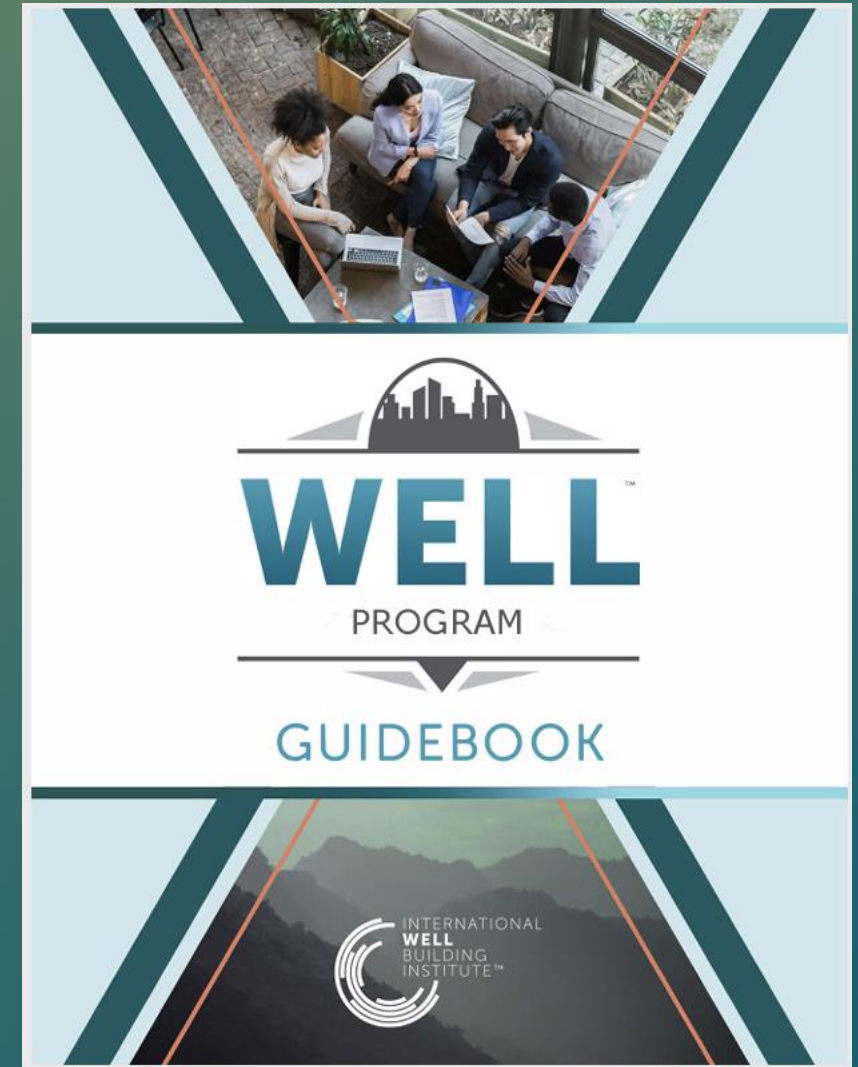


Support center

WELL Program Guidebook

A comprehensive guide to all of WELL's program rules

Enrolled in the WELL
Health-Safety
Rating



Support center- WELL Programs Guidebook

Questions?

Learn more at www.wearewell.com

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