Learning Hub @ GBRI

Presents
Week 2
AGENDA

01 WELL Certification
02 WELL Portfolio
03 Air & Water Concept
04 Case Study
05 Homework & What’s Next

Knowledge Domains & Questions

1. Air 11
2. Water 9
3. Nourishment 10
4. Light 9
5. Movement 7
6. Thermal Comfort 7
7. Sound 8
8. Materials 9
9. Mind 9
10. Community 9
11. WELL Certification 12
01. WELL Certification...getting started

Knowledge Domain 11: WELL Certification & WELL Portfolio

A. WELL CERTIFICATION

Knowledge of:
1. The registration process for WELL Certification.
2. Eligibility criteria, timelines, and processes for certification and performance verification.
3. Roles and responsibilities of project team members, a WELL AP, a WELL project administrator, owners, and the WELL coaching support team.
4. WELL Building Standard v2 scoring levels and point thresholds.
5. Alternative adherence paths (APP) and equivalencies.
6. Precertification and recertification process.
7. Synergies and/or tradeoffs between building measures and features.
8. Available Pathways for award of innovation.

Skills In:
1. Managing the documentation process including submissions using the WELL digital platform.
2. Coordinating the certification process with project stakeholders.
3. Managing post-certification requirements.
4. Recommending curative actions in response to non-passing performance verification results.
5. Assessing project compliance with WELL features applicability and scoring thresholds.
Meet Our Project!
FIRST FLOOR PLAN

Open courtyard with landscape and water elements to promote health & wellbeing of occupants, while also enhancing the micro-climate of space.

Double bank corridor with skylight vents for daylighting and air circulation.

Wide windows in classrooms for ample natural daylight, reduces dependence on artificial lighting & improves productivity.

Open corridors works as buffer thus protecting from harsh sun, strong winds & rain, while allowing diffused favourable sunlight.

Green roof helps to reduce urban heat island effect, promotes biodiversity, reduces heat transfer through roof, reduces cooling load on active systems, improves stormwater management.

Open shaded corridors also act as transitional space before entering the building.
What is WELL Certification?
Building Project(s) + Implementation + Documentation

+ 3rd Party (GBCI) Documentation Review + 3rd Party (GBCI) or approved by GBCI Performance Verification = WELL Certification
Building Project(s)

WELL Certification ROADMAP

WELL Building Standard

Implementation - Design & Construction

3rd Party (GBCI) Documentation Review

Prepare & Submit Documentation

3rd Party (GBCI or approved by GBCI) Performance Verification

WELL Certification

Why go for WELL or occupant wellness?
“WE SHAPE OUR BUILDINGS, AND AFTERWARDS OUR BUILDINGS SHAPE US.”

WINSTON CHURCHILL

Typical Business Operating Costs

<table>
<thead>
<tr>
<th></th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Cost</td>
<td>$90%</td>
</tr>
<tr>
<td>Rental Cost</td>
<td>$9%</td>
</tr>
<tr>
<td>Staff Cost</td>
<td>$1%</td>
</tr>
</tbody>
</table>

Source: wordgbc.org health, wellbeing & productivity in offices
What does the WELL Guide Contain?

- Guidelines
- Pre-Conditions
- Optimizations
WELL Certification

• Preconditions (Mandatory)
• Optimizations (Optional pathways)

PRECONDITIONS

- 24 Preconditions
- Fundamental components of a WELL Certified space and mandatory for certification
- Universal

OPTIMIZATIONS

- 84 Optimizations
- Optional pathways for projects to meet certification requirements in WELL
- Flexible
Smoke-Free Environment

This WELL feature requires projects to ban indoor smoking and ban or restrict outdoor smoking within its boundaries.

WELL CERTIFICATION

Commit to baseline health strategies across WELL v2 and earn points based on additional policy, design and operational strategies to achieve one of four certification levels.

- WELL BRONZE: 40 pts
- WELL SILVER: 50 pts
- WELL GOLD: 60 pts
- WELL PLATINUM: 80 pts
How do we get our project WELL Certified?

Registration is the first step towards WELL Certification
First step towards certification. The WELL Digital Platform (projects.wellcertified.com)

The WELL Digital Platform

An optional pathway that allows project owners to demonstrate a commitment to performance verification to confirm adherence to WELL requirements.

Projects that have satisfied the requirements of WELL and have accepted the WELL report.

WELL Digital Platform screenshot
The WELL boundary may not unreasonably exclude portions of the building, space, or site to give the project an advantage in complying with credit requirements.
Single project may encompass multiple distinct structures

Building 1
Building 2
Building 3

Single Project if certain conditions are met
Project Size - Calculation
Documentation & Performance Verification Same time

What WELL version do we register our project?

- The quarterly addenda version of WELL that was current upon enrollment
- A project may choose to update to a newer addenda
What WELL version do we register our project?

- **WELL v1 & WELL v1 Pilot**: Commercial and institutional offices; WELL v1 pilots for multifamily residential, educational facilities, retail or restaurant.

- **WELL v2 & WELL v2 Pilot**: WELL Core projects. Other projects - NO specific project type.

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**WELL FOR ALL SPACES**

WELL v2 is designed to work with all types of building projects, from commercial buildings to warehouses, stadiums to hotels, schools to hospitals.
Which of these space types describe your project?

Any space type can successfully use WELL to promote health and well-being! This helps us to tailor recommendations and support.

**Space Types**
- Office
- Residential
- Retail
- Education
- Hospitality
- Assisted Living
- Cultural Institutions
- Public Assembly
- Commercial Kitchen
- Commercial Dining
- Industrial
- Laboratory
- Fitness
- Healthcare
- Warehouses
- Childcare
- Auditorium
- Transportation

**WELL Digital Platform screenshot**

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**WELL v2 Project Creation**

**Which is the primary use of the project location?**

Knowing which space type the project is primarily dedicated to enables us to customize our guidance even further.

- Education
- Office
- Library

**WELL Digital Platform screenshot**
Primary and Secondary Space Types

Primary spaces are those that can apply to an entire project, whereas secondary spaces are always affiliated with a primary space.

Space Type Occupancy

- Regularly Occupied Space
- Occupiable Space
What else with the WELL versions? – Certification Cycle

Single-cycle Certification

3-year or 5-year Subscription (WELL v2 only)
First step towards certification.

The WELL Digital Platform
(projects.wellcertified.com)

An optional pathway that allows project owners to demonstrate a commitment to performance verification to confirm adherence to WELL requirements.

Projects that have satisfied the requirements of WELL and have accepted the WELL report.

Remains active until either WELL Certification, or registration expires.

Within five years of the date of registration, or while their subscription is active, whichever is longer.

What else with the WELL versions? – **Performance Testing**
CORE & SHELL COMPLIANCE

01
<= 25% project controlled by building owner

02
Entire base building for benefit of future tenants

03
Building structure, windows, HVAC, water quality.
WELL v2 Project Creation

Which program is best for your project?

- WELL Certification
  WELL Certification is for projects looking to address the full scope of project design, construction and operations.

- WELL Core Certification
  WELL Core Certification is for projects seeking to address fundamental features in the base building.

What ownership do you have of the project location?

- The project is a space I lease
- The project is a space I own and occupy

Back Continue
Next Steps

Every project’s approach to WELL is unique - customize yours now. The objective here is to quickly visualize how your project can benefit from applying for WELL.

1. Build your scorecard
   Start with a brief review of WELL features to select which best support your goals.
   - Access Scorecard
   - Learn More

2. Enroll your Project
   Enroll to begin detailed reviews and action planning with the help of IWBI coaching.
   - Enroll
   - View price estimate
   - Learn More

---

YOUR WELL V2 PROJECT:
GBRI Community Center (WELL Certification)
25,000 square feet

<table>
<thead>
<tr>
<th>ITEM</th>
<th>PRICING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment fee</td>
<td>$2,500 USD</td>
</tr>
<tr>
<td>Initial payment</td>
<td></td>
</tr>
<tr>
<td>Program fees</td>
<td>$6,500 USD</td>
</tr>
<tr>
<td>Pay on an annual payment plan or at documentation review</td>
<td>$0.26 /sq ft</td>
</tr>
<tr>
<td>Total WELL Fees</td>
<td>$9,000 USD</td>
</tr>
</tbody>
</table>

Onsite performance testing & data collection is required for all projects. The fees listed below are for GBCI to conduct onsite performance testing and data collection. Alternatively, projects may elect to contract with local qualified performance testing agents to perform this work. Explore our global network of WELL Performance Testing Organizations and request a quote today.

Onsite performance testing & data collection (GBCI)         $7,250 USD
Optional Services & Terms

Optional Services

- A WELL Precertification designation is an optional early phase review that helps projects communicate progress toward achieving WELL Certification and provide greater confidence that their designs, operational intents and/or existing conditions will meet WELL requirements. This interim designation has a fee of $0.05/sqft, ranging from $2,500 and capped at $25,000. Precertification fees for this project would be $2,500 USD, and can be credited toward your overall program fees.
- A WELL Health-Safety Rating is an optional milestone that demonstrates achievement of critical facility operations and maintenance alternatives needed to address emergency preparedness, resilience and recovery. This annual designation is free to earn if submitted with a precertification or certification review. If you’d like to pursue sooner, we offer our enrolled projects a discounted rate of $2,500.

Terms

- This fee estimate was generated on May 05, 2022 and is valid until Aug 05, 2022. Please check the IWBI website for the most current WELL fee schedule. In addition to the fees, IWBI will collect applicable sales or use taxes, if any, as required by law.
- The fees listed above do not include fees for recertification of an existing WELL Certified project. When you seek recertification, such fees will be calculated on the dates on which they are incurred and invoiced as they are incurred. The fees listed above also do not include fees for optional services, such as the review of requests for alternative compliance paths or innovation features, the review and approval of curative action plans, or the undertaking of appeal.
ROLES

OWNER

PROJECT ADMINISTRATOR

WELL Reviewer

WELL Performance Testing Agents

ADDITIONAL SIGNATORIES

WELL AP

WELL Coaching Contacts

Owner’s Rep

Rest of the Project Team
## Project Owner
The project owner is the individual or entity that holds all legal right to possess and control project-relevant location and to authorize decisions pertaining to the location.

### Owner Organization

<table>
<thead>
<tr>
<th>Owner Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Owner name

<table>
<thead>
<tr>
<th>Owner name</th>
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<tbody>
<tr>
<td></td>
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</tbody>
</table>

### Owner email

<table>
<thead>
<tr>
<th>Owner email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Owner phone

<table>
<thead>
<tr>
<th>Owner phone</th>
</tr>
</thead>
<tbody>
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<td></td>
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</tbody>
</table>

### Industry

- Select an industry

### Organization website

<table>
<thead>
<tr>
<th>Organization website</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Organization Overview

<table>
<thead>
<tr>
<th>Organization Overview</th>
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<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Are you planning to undergo construction or renovation?

- [ ] No, existing building
- [ ] Yes

### Other certifications being pursued

- BREEAM
- DGNB
- Green Star
- HQE
- LEED
- Living Building Challenge
- OSMOZ
- Other

### Estimated date of document submission

<table>
<thead>
<tr>
<th>Estimated date of document submission</th>
</tr>
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<td></td>
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</tbody>
</table>

### Anticipated date of construction completion

<table>
<thead>
<tr>
<th>Anticipated date of construction completion</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Does your project qualify for any of the following market sectors?

- [ ] Non-Profit, charitable organizations

[Continue]
WELL Certification ROADMAP

1. Team Formation
2. Understand Documentation Requirements

DOCUMENTATION REQUIREMENTS

01 Annotated Documents
02 Letters of Assurance (LOAs)
03 General Documents
DOCUMENT STAGES

01
Intent Stage

02
Implementation Stage

Table 1: Description of documentation type for each stage

<table>
<thead>
<tr>
<th>LOMs</th>
<th>Document</th>
<th>Intent-Stage</th>
<th>Implementation-Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>Intent-stage template</td>
<td>Implementation stage template</td>
<td></td>
</tr>
<tr>
<td>Contractor</td>
<td>Intent-stage template</td>
<td>Implementation stage template</td>
<td></td>
</tr>
<tr>
<td>Architect</td>
<td>Intent-stage template</td>
<td>Implementation stage template</td>
<td></td>
</tr>
<tr>
<td>MEP</td>
<td>Intent-stage template</td>
<td>Implementation stage template</td>
<td></td>
</tr>
</tbody>
</table>

Annotated documents

- Annotated Map: Proposed conditions, Final conditions
- Architectural Drawing: Any design phase, 100% CDI* / As built
- Commissioning Report: Intent-stage commitment template, Yes
- Design Specifications: Any design phase, 100% CDI* / As built
- Educational Materials: Draft or Intent-stage commitment template, Final*
- Mechanical Drawing: Any design phase, 100% CDI* / As built
- Modeling Report: Any design phase, Final*
- On-going Data Report: Intent-stage commitment template, Required following initial certification
- Operations Schedule: Draft, Final*
- Policy Document: Draft, Final*
- Professional Narrative: Proposed conditions, Final conditions
- Remediation Report: Intent-stage commitment template, Required
- Signage & Communications Materials: Draft or Intent-stage commitment template, Final*
- Survey Materials: Draft or Intent-stage commitment template, Final*

Performance

- Performance Test: Narrative, None [undertaken by a WELL Performance Testing Agent during PV*]
- Photographs: None, None [taken by a WELL Performance Testing Agent during PV*]

*NOTE: “CDI” = “Construction Documents”, “PV” = “Performance Verification”. “Draft” refers to full documentation requirements specified in each column. For WELL Pre-certification, projects may submit a document from either column, while for WELL Certification, only the Implementation stage column is allowed.
1. Documentation

2. AAPs

Implementation - Design & Construction

Documentation Review

1. Pre-design
2. Pre-Certification

3 Years Validity. Ongoing Monitoring - Annual Submissions - Re-certification

WELL Certification

1. Team Formation
2. Understand Documentation Requirements

WELL Project Registration

2. Understand Documentation Requirements

1. WELL Report
2. Curative Actions & Appeals

WELL Precertification

WELL Certification

WELL Certification ROADMAP

WELL PRECERTIFICATION
**PRECERTIFICATION FOR WELL v1**

- Precertification is achieved through different pathways for WELL v1 and WELL v2 projects.
- The Precertification Review is focused on the intended design, construction, and operational strategies for the project.
- The WELL Precertification designation for WELL v1 projects includes the targeted level of certification.

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**WELL v2 Precertification**

- Intent-stage documents
- Implementation-stage documents
- Or a Combination
- Precertification documentation
- WELL Reviewer (20-25 business days)
- WELL Precertification
Innovations & Alternative Adherence Paths

Alternative adherence paths (AAPs). These are used when projects wish to deploy alternative strategies to meet the intent of an existing WELL feature.

Innovation features. These are used when projects wish to receive credit in WELL for pursuing intents and strategies that do not have a precedent in an existing WELL feature.
WELL v1 and WELL v2 projects: 3 Free AAPs.

WELL v1 pilots, WELL v2 pilot and all WELL subscribers: 10 Free AAPs.
Innovation Features

**WELL v1 and WELL v1 pilots:**
Projects may submit for and achieve up to 5 innovations.

**• WELL v2 and WELL v2 pilot:**
Projects may submit for and receive up to 10 innovations.

Equivalencies

Depending on the location of the project, different laws, regulations, codes or programs (collectively referred to as “references”) may be more relevant than the reference in the WELL feature language.
The WELL Reviewer will begin this review once a project submits all design and protocol documentation attesting to conditions in-place (Implementation-stage documents,
Performance Verification

- Performance tests span measurements across several environmental parameters in accordance with WELL,
- including:
  - Air quality (e.g., organic and inorganic gases, particulates)
  - Water quality (e.g., dissolved chemicals, suspended solids)
  - Light attributes (e.g., light intensity, spectral power distribution)
  - Thermal considerations (e.g., ambient and radiant temperature, air speed, humidity)
  - Acoustic elements (e.g., decibel levels, reverberation)
- Testing and measurements will be completed according to sampling protocols set by IWBI based on the
  - size and type of the project, and some collected samples will be sent to a third-party laboratory for
  - analysis.
Table 2: Conditions Necessary to Conduct Performance Testing

<table>
<thead>
<tr>
<th>PATH</th>
<th>DOCUMENTATION APPROVED</th>
<th>CONSTRUCTION COMPLETE</th>
<th>ONE MONTH FROM CERTIFICATE OF OCCUPANCY</th>
<th>50% OCCUPANCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>WELL v2 and WELL v2: pilot (excluding multifamily residential)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>WELL v2 New and Existing Buildings</td>
<td>Yes</td>
<td>vac (see note below)</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>WELL v2 New and Existing Interiors</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>WELL Core and Shell (WELL v1)</td>
<td>Yes</td>
<td>vac (see note below)</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>WELL Core (WELL v2 and WELL v2: pilot)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>WELL v1 pilots: Retail, Restaurant, Educational Facilities and Commercial Kitchen</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Multifamily Residential (WELL v1 &amp; WELL v2) (including pilots)</td>
<td>Yes</td>
<td>vac (see note below)</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Performance Testing Agents

- Performance Testing by GBCI
- Performance Testing by other Agents
VERIFIED PERFORMANCE

WELL prioritizes accountability through a data-driven performance review and on-site environmental assessment.

**ONSITE TESTING + PERFORMANCE REVIEW = PERFORMANCE VERIFICATION**

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**WELL Certification ROADMAP**

1. Team Formation
   1. Performance Verification
   2. Curative Actions & Appeals

2. Understand Documentation Requirements

1. Pre-design
   1. Documentation Review

2. Pre-Certification

Implementation - Design & Construction

1. Innovation, AAPs & Equivalencies

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WELL Project Registration

WELL Certification
WELL Report

The WELL report will provide a feature-by-feature assessment of whether requirements of WELL features pursued by the project were approved.

CURATIVE ACTIONS AND APPEALS

Curative action is available to project teams that wish to undertake corrective measures to address unmet performance testing criteria and schedule follow-up performance testing.

Appeals are available to projects that wish to contest findings of the WELL report.
WELL Certification ROADMAP

1. Documentation
2. Innovations, AAPs & Equivalencies

Implementation - Design & Construction

1. Pre-design
2. Pre-Certification

1. Documentation
2. Innovations, AAPs & Equivalencies

WELL Report
1. WELL Report
2. Curative Actions & Appeals

Documentation Review
1. Performance Verification
2. Curative Actions & Appeals

WELL Certification

WELL Certification v2

Commit to baseline health strategies across WELL v2 and earn points based on additional policy, design and operational strategies to achieve one of four certification levels.

WELL BRONZE 40 pts
WELL SILVER 50 pts
WELL GOLD 60 pts
WELL PLATINUM 80 pts
AWARD & ONGOING MONITORING

- The WELL Reviewer will begin this review once a project submits all design and protocol documentation attesting to conditions in-place (Implementation-stage documents,
Recertification

Calculations

• Do not apply rounding.
• Use the most expansive interpretation of the result.
• For example, Feature V02 Part 1 requires adjustable height workstations for “at least 25% of all workstations.”
• In a project with 21 workstations
• 25% would be 5.25
• And since five desks would only reach
• 23.8% - the project provide 6 adjustable height workstations
A minimum scope is met – that is, the minimum level of achievement necessary to achieve a feature related to people, spaces and/or products.
**WELL Certification Timeline**

**Registration**
- WELL Project Registration
- 3 Months / Years

**Precertification**
- Short Description: Start: May 20YY
- 2 Months / Years

**Implementation**
- Short Description: Start: Jun 20YY
- 4 Months / Years

**Re-certification**
- Short Description: Start: Apr 20YY
- 3 Months / Years

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**Knowledge Domain 11: WELL Certification & WELL Portfolio**

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6. Precertification and recertification process.
7. Synergies and/or tradeoffs between building measures and features.
8. Available Pathways for award of innovation.

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3. Managing post-certification requirements.
4. Recommending curative actions in response to non-passing performance verification results.
5. Assessing project compliance with WELL features applicability and scoring thresholds.
02.

WELL Portfolio

Exercise

B. WELL Portfolio

Knowledge of:
1. WELL Portfolio scope and eligibility requirements.
2. WELL Portfolio scales of documentation and review process.
3. Factors that influence the WELL Portfolio score.
<table>
<thead>
<tr>
<th>Verification method</th>
<th>Scale</th>
<th>Subject to audit?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner LOA</td>
<td>Shareable (Guidelines)</td>
<td>No</td>
</tr>
<tr>
<td>Contractor LOA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Architect LOA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MEP LOA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operations Schedule (or Operations &amp;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy document)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy Document</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annotated Plan</td>
<td></td>
<td></td>
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<tr>
<td>Architectural Drawing</td>
<td></td>
<td></td>
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<tr>
<td>Commissioning Report</td>
<td></td>
<td></td>
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<tr>
<td>Design Specifications</td>
<td></td>
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<tr>
<td>Educational Materials</td>
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<tr>
<td>Mechanical Drawing</td>
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<td>Modeling Report</td>
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<td>Ongoing Maintenance Report</td>
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<td>Photographic</td>
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<td>Professional Narrative</td>
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<td>Renovation Report</td>
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<td>Signage and Communications</td>
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<tr>
<td>Materials</td>
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<tr>
<td>Survey Narrative</td>
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<tr>
<td>Ongoing Data Report</td>
<td>Individual scale</td>
<td>No</td>
</tr>
<tr>
<td>Performance Test</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Projects may use individual-scale documents for any feature.