



THE WELL CERTIFICATION GUIDEBOOK

Applies to WELL v1 and WELL v2™
2018

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REGISTRATION

Registration signifies your intent to pursue WELL Certification. WELL Online (projects.wellcertified.com) is the official online registration application and project management system for WELL. Once the registration invoice has been cleared, projects are considered officially registered for WELL.

At the point of registration, projects may elect to either:

1. Register for single-cycle certification.
2. Register and activate a three-year or five-year subscription (WELL v2 only).

For projects that sign up for a subscription, recertification and mid-cycle reviews (see 'Mid-Cycle Reviews') are included.

WELL Versions and Programs

Registration requires submitting basic information about the project and the project scope. The registration process differs for projects depending on the version or program under which the project registers:

WELL Building Standard version 1 (WELL v1), WELL v1 pilots: Projects register under a specific project type. Depending on the indicated primary space type of the project, the project may register under WELL v1 for commercial and institutional offices; WELL v1 pilots for multifamily residential, educational facilities, retail or restaurant.

WELL Building Standard version 2 pilot (WELL v2): WELL Core projects must identify as such at registration. All other projects do not register under a specific project type. Based on information submitted prior to registration, a WELL scorecard will be recommended to the project team with features relevant to the types of spaces present within the project boundary. Projects may further tailor the scorecard by adding and subtracting features prior to registration and can continue to refine the scorecard up until documentation submission.

Upon registration, WELL projects must complete documentation submission and schedule performance testing within a certain timeframe:

WELL v1 and WELL v2: Within five years of the date of registration, or while their subscription is active, whichever is longer.

WELL v1 pilots: Within five years of the date of registration.

If a project does not submit documentation within this period, it may be subject to fee increases and if it does not undertake and submit measurements for performance review within this time period, registration will expire. If a project anticipates difficulty in meeting these deadlines, it must request an extension from IWBI at least one year prior to the registration expiration date and submit documentation explaining why a longer period of time is necessary.

Project Size

At registration, projects define the boundaries of project scope. 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. The project must accurately communicate the scope of the certifying project in all promotional and descriptive materials and distinguish it from any non-certifying

space. The project should be defined by a clear boundary such that the project is physically distinct from non-certified areas.

The following presents guidelines for how projects should calculate project size for WELL:

The gross square footage entered for the project should include the sum of the floor areas of the spaces within the building including, as applicable, basements, mezzanine and intermediate-floored tiers, and penthouses with headroom height of 7.5 ft or greater. Measurements must be taken from the exterior faces of the exterior walls OR from the centerline of walls separating buildings. The gross square footage should exclude non-enclosed (or non-enclosable) roofed-over areas such as exterior covered walkways, porches, terraces or steps, roof overhangs and similar features. It should also exclude air shafts, pipe trenches, chimneys and floor area dedicated to the parking and circulation of motor vehicles.

ROLES AND RESPONSIBILITIES

WELL Reviewer

After documentation submission, the Green Business Certification Inc. (GBCI) will assign a GBCI WELL Reviewer to the project. The WELL Reviewer is the third-party individual responsible for reviewing your project for certification. After submission for certification, the WELL Reviewer is responsible for reviewing both documentation and performance test results for compliance with WELL requirements.

Project Team Roles

Project team members will have distinct responsibilities throughout the certification process, as described below.

Project Administrator

Project administrators act as project managers and oversee the WELL process. The project administrator is the primary point of contact on the project and must be copied on all correspondence with IWBI and GBCI. This individual will also be the recipient of a comprehensive WELL report following documentation review and performance verification, as well as the WELL award package.

The project administrator can be a WELL Accredited Professional (WELL AP), the owner (see below), or another designated representative of the project team.

This individual is responsible for ensuring that all project documentation is complete and accurate before submitting for review. The project administrator is ultimately responsible for the overall quality of the documents submitted and is expected to complete a thorough quality control check of all documentation and forms prior to submission for review.

Owner

Owners are responsible for authorizing registration of the project and will be required to validate various documents used to demonstrate that WELL features are satisfied. The owner will receive an email with the WELL Certification Agreement for their eSignature. The project administrator will have the option to send this after completing the project registration page.

An owner can be an individual property owner or a representative who is delegated responsibility by an entity that owns the property. Owners have the authority to hold and control project-relevant property and to authorize decisions pertaining to that property.

In circumstances where multiple owners hold rights over a property, a single owner must be identified as the authorized decision-maker for purposes of WELL. In such cases, the project team must submit a Confirmation of Primary Owner's Authority Form, which is available upon request.

Additional Signatories

Some WELL documents will require validation by the appropriate professional overseeing the relevant aspect of design, construction or operations. Therefore, architects, contractors, and mechanical, electrical and plumbing (MEP) engineers are required to provide specific declarations and/or calculations pertaining to the project. Further, an owner's representative may also play a role in affirming that design and operational requirements are met in place of the owner.

WELL Accredited Professional (WELL AP)

The WELL AP credential recognizes building industry professionals who are knowledgeable of the conceptual and applied frameworks of WELL and are experienced in its application on registered and certified WELL projects. WELL APs can help guide projects to successful certification awards. Project teams are not required to include a WELL AP but having a WELL AP as part of a project team will help to address all necessary aspects of WELL and qualifies projects for achievement of a pre-approved innovation feature in WELL.

WELL Coaching Contacts

Upon official registration to WELL, all projects are assigned a WELL coaching contact from IWBI to help guide projects through the certification process and to further support project administrators and WELL APs. Coaching contacts answer questions, share helpful resources and tools, and provide feedback and direction over the course of the certification process.

Coaching contacts from IWBI do not play a role in approving submissions from projects or certification rulings. These activities are strictly managed by GBCI as the third-party certification body for WELL.

DOCUMENTATION REQUIREMENTS

WELL requires projects to provide documentation as evidence that certain WELL features are met. WELL Online is the official online registration application and project management system for WELL Certification. This online platform is used to house all documents related to a WELL project, and to submit information for review by the WELL Reviewer.

Documents can be uploaded to WELL Online as they are prepared. Once all documents are uploaded, the project administrator is expected to perform a thorough quality check before submitting for review in WELL Online. The project will be notified when all documents have been reviewed and approved by GBCI. Documentation review will begin once registration payment has cleared.

Required Document Types

All documentation must be submitted through WELL Online. Documentation may be uploaded onto WELL Online as it is prepared by the project team.

1. Annotated Documents

Annotated documents refer to existing project documents that are marked up to provide additional information to indicate how WELL features have been met. Types of annotated documents include the following:

- A. Design documents (as applicable, for WELL D&O Review)
- B. Construction documents or as-built drawings (with pertinent information marked or highlighted).
- C. Operations schedules with time log templates (as applicable).
- D. Policy documents (e.g., employee handbooks with pertinent information marked or highlighted).
- E. Signage and communication materials.
- F. Professional narratives.
- G. Other materials including surveys and balancing reports.

2. Letters of Assurance (LOAs)

Separate letters of assurance must be submitted by the appropriate professional overseeing the implementation of a specific WELL feature during design, construction or operations. Letters of assurance will be required from the following professionals to confirm that features have been met:

- A. Architects.
- B. Contractors.
- C. MEP Engineers.
- D. Owner.

3. General Documents

Annotated documents and letters of assurance are tied to specific feature requirements. The documents listed below, however, are not linked to the verification of a specific feature but are instead required as a general document for the certification process at large. These documents do not need to be annotated but are used to inform IWBI and the WELL Reviewer of details of the project.

Required general documents include the following:

- A. Signed WELL Certification Agreement.
- B. A project checklist.
- C. Representative floor plans or project maps.
- D. Mechanical drawings.
- E. Narrative describing the project in general and listing the attempted features.
- F. Proof of construction completion. This may be through a certificate of occupancy or other documentation that similarly confirms that construction is complete

Document Stages

There are two stages of WELL documentation that projects may utilize during the certification process: Intent-stage documents, for use in the optional WELL Design & Operations early stage review (available in WELL v2 only) and Implementation-stage documents, for use in either WELL D&O or Documentation Review. WELL Certification requires approval of all Implementation-stage documents for features being pursued.

Intent-stage documents refer to planned conditions or operations, while Implementation-stage documents refer to construction/as-built drawings or implemented programs. Intent-stage documents are created to represent early-stage design or plans for the development of a program, policy, or operations protocol, whereas Implementation-stage documents represent the final project. Both stages of documents must contain sufficient detail so as to demonstrate compliance with the relevant features. *Table 1* describes details on what type of documentation is required at each stage.

Table 1: Description of documentation type for each stage.

Document	Intent-stage	Implementation-stage
LOAs		
Owner	Intent-stage template	Implementation-stage template
Contractor	Intent-stage template	Implementation-stage template
Architect	Intent-stage template	Implementation-stage template
MEP	Intent-stage template	Implementation-stage template
Annotated documents		
Annotated Map	Proposed conditions	Final conditions
Architectural Drawing	Any design phase	100% CDs* / As built
Commissioning Report	Intent-stage commitment template	Yes
Design Specifications	Any design phase	100% CDs* / As built
Educational Materials	Draft or Intent-stage commitment template	Final*
Mechanical Drawing	Any design phase	100% CDs* / 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 Performance Testing Agent during PV*]
Photographs	None	None [taken by Performance Testing Agent during PV*]

* NOTE: “CDs” = “Construction Documents”, “PV” = Performance Verification”, “Final” refers to full documentation requirements specified in each feature. For WELL D&O, projects may submit a document from either column, while for WELL Certification, only the Implementation-stage column is allowed.

PRECERTIFICATION

Precertification is only available for WELL v1 and WELL v1 pilot projects. This is an optional review pathway available to all project types for a fee. The Precertification review is focused on the intended design, construction, and operational strategies for the project. WELL Precertification allows project owners to demonstrate health and wellness in the built environment, market the proposed wellness features of a project to potential tenants looking to occupy the WELL Certified space and determine which features the project is likely to achieve during the full WELL Certification review.

WELL DESIGN & OPERATIONS (WELL D&O)

Projects registered for WELL v2 may opt for an early phase of review to receive the WELL Design & Operations (WELL D&O) designation. This interim designation can help projects communicate progress toward achieving WELL certification and provide greater confidence that their designs, operational intents, and/or existing conditions meet the requirements of WELL features. WELL D&O can be pursued for an existing space or in advance of renovation/construction completion (as applicable). Additional fees apply for WELL D&O Review.

If a project elects to pursue WELL D&O, this occurs prior to Documentation Review and Performance Verification. For WELL D&O, projects may submit feature-specific documentation reflecting operational commitments and design intents (Intent-stage documents), or implemented conditions (Implementation-stage documents), or a combination of these two categories. (For more information about these document stages, see *Documentation Requirements*.) Implementation-stage documentation that is approved during the WELL D&O review does not need to be re-submitted during Documentation Review and can fulfill the documentation requirements for that feature, unless the relevant project conditions have changed.

To be awarded WELL D&O, projects must submit documentation that demonstrates compliance with all preconditions and that achieves enough points for the lowest level of WELL certification as follows:

- WELL Core projects: 40 points, including a minimum of one point in each concept
- All other projects: 50 points, including a minimum of two points in each concept

Above this minimum, the WELL D&O designation does not further differentiate how many points are successfully reviewed (e.g., there is no “WELL D&O Gold”). Projects may submit feature documentation for D&O review that exceeds the minimum but does not exceed 100 points in order to receive an early stage review of those strategies. Alternatively, projects may submit the minimum levels of documentation for D&O review, and then submit additional features for review during Documentation Review to pursue higher levels of certification.

After documentation is submitted, the WELL Reviewer will respond with review comments within 20-25 business days, indicating if documentation submitted for each feature is satisfactory, and indicating if additional information is needed. The project will be notified if the WELL Reviewer finds any submissions to be inaccurate or unsatisfactory, or if further documentation is required. The project will have an opportunity to amend existing documents or submit additional materials for a second review if necessary. The WELL Reviewer will respond with the results of the second review within 20-25 business days.

If any additional reviews are required, additional fees will apply. Any additional rounds of review will also be completed within 20-25 business days.

The project will be notified when all documents have been reviewed and approved. At this point, projects are awarded WELL D&O designation. A project’s WELL D&O designation remains active until either the project achieves certification or its registration expires.

DOCUMENTATION REVIEW

All projects must successfully pass Documentation Review. The WELL Reviewer will begin this review once a project submits all design and protocol documentation attesting to conditions in-place (Implementation-stage documents, see *Documentation Requirements*).

After documentation is submitted, the WELL Reviewer will respond with review comments within 20-25 business days, indicating if documentation submitted for each feature is satisfactory, and indicating what additional information is needed. The project will be notified if GBCI finds any submissions to be inaccurate or unsatisfactory, or if further documentation is required. The project will have an opportunity to amend existing documents or submit additional materials for a second review. The WELL Reviewer will respond with the results of the second review within 20-25 business days.

If any additional reviews are required, additional fees will apply. Any additional rounds of review will also be completed within 20-25 business days.

When a WELL v2 project that has achieved WELL D&O submits for Documentation Review, it does not need to submit any documents for features achieved utilizing Implementation-stage documents, provided that relevant project conditions have not changed. The project *does* need to submit new documentation for features that used Intent-stage documentation, since that documentation referred to a different state in the construction process.

If all documents are found to be satisfactory, then the project may proceed to Performance Verification.

PERFORMANCE VERIFICATION

Projects must successfully pass performance verification to confirm adherence to WELL requirements and earn certification. After Performance Verification, a project will be issued its WELL Report.

Eligibility Criteria for Performance Testing

Certain conditions must be met before a project can conduct performance testing. These vary based on project type and are described in *Table 2*. There may be additional criteria for WELL v1 pilot projects outlined in the introduction to the pilot addenda.

Table 2: Conditions Necessary to Conduct Performance Testing

PATH	DOCUMENTATION APPROVED	CONSTRUCTION COMPLETE	ONE MONTH FROM CERTIFICATE OF OCCUPANCY	50% OCCUPANCY
WELL v2 (excluding multifamily residential) WELL v1 New and Existing Buildings WELL v1 New and Existing Interiors	Yes	Yes	Yes	Yes
WELL Core and Shell (WELL v1) WELL Core (WELL v2)	Yes	Yes (see note below)	No	No
WELL v1 pilots: Retail, Restaurant, Educational Facilities and Commercial Kitchen	Yes	Yes	Yes	No
Multifamily Residential (WELL v1 & WELL v2)	Yes	Yes (see note below)	No	No

Note: 'CONSTRUCTION COMPLETE' for WELL Core & Shell (WELL v1) and WELL Core (WELL v2) refers to the base building; interiors do not have to be complete, however, active construction of interiors will likely have a negative impact on performance testing results for the project. For multifamily residential, buildings must be complete (i.e., ready to turn over to residents) but do not need to be furnished or occupied.

Performance Verification Logistics

Performance tests span measurements across several environmental parameters in accordance with WELL, including:

1. Air quality (e.g., organic and inorganic gases, particulates)
2. Water quality (e.g., dissolved chemicals, suspended solids)
3. Light attributes (e.g., color quality, intensity, spectral power distribution)
4. Thermal considerations (e.g., ambient and radiant temperature, air speed, humidity)
5. Acoustic elements (e.g., decibel levels, reverberation)

6. 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.

For more information on performance testing protocols and the full list of parameters measured in WELL, see the Performance Verification Guidebook.

Please note that due to the nature of performance testing, there are variables outside of the control of the performance testing agent that could impact the performance verification timeline. Performance testing involves analysis performed by various third-party laboratories for radon, formaldehyde, VOCs, and up to 32 different water contaminants. In some cases, the results analysis may take additional time. Additionally, if the results from the laboratory are outside of accepted accuracy or tolerance ranges, or if laboratory samples are damaged during shipping, additional testing may be required and could increase the certification timeline. Any additional testing is done to ensure the accuracy of the results and for the benefit of the project team.

During performance testing, an individual with authorized access to all areas of the building will need to be present so that performance tests and inspections may be conducted in any area, including mechanical and tenant spaces, grounds and the roof. Depending on the building size, performance testing may span multiple days.

Performance Testing Agents

All performance testing agents undergo training by GBCI to evaluate on-site environmental parameters according to WELL testing protocols and equipment specifications. A list of approved performance testing agents is available online on GBCI's website. Performance testing agents may either refer to agents employed or contracted by GBCI, or individuals trained by GBCI and approved to conduct performance testing services for WELL v2 projects. Performance testing agents contracted by WELL v2 project teams must demonstrate that there is no conflict of interest with the project.

Performance testing agents conduct performance tests on-site, send samples to labs for testing, analyze data, collect photographic evidence and submit results for Performance Review by the WELL Reviewer. As the third-party certification body for WELL, GBCI will perform Documentation Review and Performance Review for all projects.

Projects must pass Documentation Review before submitting performance testing data for review. Though projects are encouraged to undergo regular performance testing as soon as the project is operational, for purposes of the Performance Review, projects may not submit any performance testing results to GBCI that were captured prior to documentation approval.

1. Performance Testing by GBCI

Full-service Performance Verification by GBCI encompasses a site visit during which a GBCI performance testing agent conducts tests and a WELL Reviewer reviews test results to confirm that all applicable requirements of WELL features have been met, indicating that the project has achieved all necessary requirements for certification.

2. Performance Testing by Other Agents (WELL v2 only)

WELL v2 projects have the option to contract directly with GBCI-trained performance testing agents to conduct performance testing. Performance testing agents must submit both analyzed results and raw data to GBCI for Performance Review using the prescribed format outlined in the Performance Verification Guidebook. The WELL Reviewer will evaluate performance testing results to confirm tests were conducted according to specification, verify results have been analyzed correctly, and determine whether the project meets the requirements in WELL.

WELL REPORT

The WELL report will provide a feature-by-feature assessment of whether requirements of WELL features pursued by the project were approved. A comprehensive WELL report will be available on WELL Online within 40-45 business days of submission of performance testing results. This includes inspection details (as applicable), analysis results and the status of documents previously submitted by the project team for approval.

If the project has not met certain WELL criteria, the WELL report will indicate where deficiencies exist. Projects that do not successfully achieve all WELL performance criteria during performance testing may enact curative actions to initiate another round of performance testing and Performance Review. See 'Curative Actions and Appeals' for more information.

Once the WELL report is issued, the project team is required to either accept their WELL report via WELL Online or initiate curative actions or an appeal within 180 calendar days. If the WELL report indicates a pass, then the project will be issued the applicable certification level as described in the WELL report. If, within 180 calendar days after issuance of the WELL report, the project has neither affirmatively accepted the WELL report on WELL Online nor initiated a curative action or appeal, the project will be deemed to have accepted the WELL report as final.

AWARD & ONGOING MONITORING

Certification Award

Projects that have satisfied the requirements of WELL and have accepted the WELL report are officially designated as WELL Certified projects.

IWBI encourages project teams to promote their achievement through a variety of means, and provides a suite of resources to support WELL Certified projects, including:

- Complimentary WELL Certification certificates that may be displayed on-site.
- Access to the official WELL Certification graphics for use in marketing materials.
- 10 complimentary printed certification certificates (also available digitally). Projects may also place an order for the certification plaque online at <http://www.greenplaque.com/well>. Plaques take between 3 to 6 weeks to ship depending on the type of plaque ordered.
- Template press releases and other messaging resources.
- Opportunities for amplification on social media.

The WELL Certification plaque or other signage will indicate the level of certification and the year certified (or the year of recertification) and may only be displayed at the site of the WELL Certified project.

For more information, please view the WELL Branding Guidelines.

Annual Submissions

In order to maintain status as a WELL Certified project prior to recertification, project teams must adhere to reporting requirements.

Certain features require projects to submit reports on the following:

- A. Results of occupancy surveys
- B. Proof of maintenance (e.g., logs of cleaning schedules and filter replacement)
- C. On-going monitoring of environmental parameters (e.g., air and water quality)

These features generally require submission to WELL Online on an annual basis. To remain in good standing, projects must submit the documents within 15 months of certification and then every 12 months thereafter. Failure to provide these reports within the required time frame may render a project ineligible for recertification and/or result in additional requirements and fees assessed at recertification. For details on reporting requirements, refer to the relevant WELL features.

In some cases, results from on-going monitoring of environmental parameters may be used in place of scheduling performance testing at recertification. For more information on this process, see 'Recertification' below.

INNOVATIONS & ALTERNATIVE ADHERENCE PATHS

WELL features create linkages between elements of building design or operations and occupant health, wellness and comfort. WELL ultimately seeks to establish a set of universally applicable features that are feasible across all building types and contexts. However, the various ways in which the built environment impacts health across diverse contexts are multiple and overlapping, and there are paths to healthful construction and design that may be uncovered during the WELL certification process.

In recognition of the complexity involved in fully addressing all dimensions of health through the built environment, and the myriad ways different projects can promote health for their populations, WELL provides opportunities for creativity through two processes:

1. Alternative adherence paths (AAPs). These are used when projects wish to deploy alternative strategies to meet the intent of an existing WELL feature.
2. 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.

Alternative Adherence Paths (AAPs)

WELL allows for innovative, alternate solutions for meeting requirements in WELL through the AAP process, so long as proposals still meet the feature intent and are supported by cited scientific, medical and industry research. Project teams may propose an alternative for any requirement of WELL by submitting an AAP through the project dashboard on WELL Online.

Each AAP submission must pertain to one feature and there is no limit on the number of AAPs that can be submitted per project. A project may have only one AAP under review per feature part. Unless an AAP for a feature has been reviewed and returned to the project team, another AAP for the same feature part may not be submitted by the same project.

Each project receives a set number of free AAPs; additional AAPs may be submitted for a fee. The number of free AAPs provided to each project varies depending on the project registration:

WELL v1 projects: Three free AAPs.

WELL v1 pilots, WELL v2 (pilot) and all WELL subscribers: Ten free AAPs.

Projects may submit up to three alternative adherence path proposals prior to registration. The rulings for these AAPs may be used by the project after registration. Note that these AAPs will be counted toward the project's total AAPs. A project may retract an AAP submission by emailing the WELL coaching contact with a request. The AAP submission will not be counted toward the project's free AAPs if the request to retract is received within 48 hours of original submission.

The ruling for the AAP will be updated on WELL Online within 10-15 business days after submission. If a clarification or additional information is required, a Mid Review Clarification request (MRC) will be issued. The project will have ten business days to respond to the Mid Review Clarification request before review will resume. The AAP ruling will be issued within ten business days of the MRC response. If the project does not respond to the MRC request, the AAP ruling will be issued within ten business days of the deadline.

Usually, AAP rulings apply only to the project that submitted the application. However, in some situations, multiple projects may submit a single AAP and utilize the ruling across all specified projects. Projects eligible to utilize this pathway are required to meet at least one of the following requirements:

1. The projects are located at the same development site.
2. The AAPs submitted are for features categorized as "Organizational Protocol".

In both cases, the strategy proposed by the AAP must be identical across all projects. Further, the project must specify in the AAP submission the names and IDs of all additional projects that wish to apply the AAP. Only projects registered for WELL Certification may be listed.

While requests for AAPs will be kept private, summaries may be published. If an AAP has broad application, the strategies described in the application may be incorporated and published as a precedent-setting AAP and released through IWBI-issued quarterly addenda.

If a project has any questions about AAP rulings, the project should reach out to GBCI.

Innovation Features

Innovation features pave the way for projects to develop unique strategies for creating healthy environments. A proposed innovation feature can relate to any of the WELL Concepts. For a given project, innovation features must either address a novel concept or strategy not already included in WELL or achieve results above and beyond the existing requirements in a WELL Feature. Further, several pre-approved innovation features are available for project teams to use. These pre-approved innovations are published online.

Innovation features must be supported by sufficient rationale based on cited scientific, medical and industry research. Innovation proposals must be submitted during the Documentation Review phase on WELL Online.

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

WELL v2: Projects may submit for and receive up to ten points for innovations.

If an innovation submission is not approved during the preliminary phase of Documentation Review, the project may submit for an alternative innovation in the final phase of Documentation Review.

Since innovation submissions are reviewed during the documentation review phase, projects will only learn if innovation proposals were approved alongside the rest of their documentation. If a project would like input on an innovation proposal before Documentation Review, the project may submit the innovation proposal earlier on as an AAP and receive a ruling before Documentation Review commences.

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.

For such cases, IWBI accepts proposals for equivalencies which may be used in place of the reference in WELL. Proposals must cite the specific reference in the WELL feature language and include evidence of equivalency. Equivalency may be established based on closeness of technical requirements or closeness in the level of leadership demonstrated by compliance with the proposed equivalency compared to the level of leadership demonstrated by compliance with the reference in WELL.

If IWBI approves a proposed reference as an equivalency, the reference and any additional requirements or caveats will be published online and made available to other projects as an alternative means to satisfy the feature.

CURATIVE ACTIONS AND APPEALS

The WELL report will outline where a project has failed performance criteria or other requirements.

After the WELL report is issued, the project owner has 180 calendar days to either accept the WELL report, initiate curative action or file an appeal. 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.

Fixed baseline fees are associated with curative action requests and appeals. Additional fees apply depending on the WELL features in question, and whether performance re-testing by a GBCI performance testing agent is necessary to confirm compliance with WELL requirements.

Curative Actions

To pursue a curative action path for any features with unmet requirements, a curative action plan must be submitted within 180 calendar days after issuance of the WELL report. The plan must outline steps for addressing unmet features.

The curative action plan will be reviewed by the WELL Reviewer and results will be provided within 20-25 business days. If the curative action plan is accepted, the project must then enact curative actions as outlined and schedule performance re-testing as necessary.

Features that require re-testing by a performance testing agent during a follow-up site visit will vary based on which features are impacted during the execution of the curative action plan. For example, projects that fail to meet requirements concerning microorganisms in a feature may address this problem with the addition of chlorine. By doing so, however, the project could risk exceeding the chlorine limits of another feature.

After performance re-testing has been completed and a WELL Reviewer has evaluated and confirmed performance re-testing results, an updated WELL report will be created and updated on WELL Online.

Performance re-testing can be repeated (for additional fees) following additional curative actions should the WELL report resulting from the first round of re-testing once again indicate a failure to achieve certification. For re-testing, the project can engage the same performance testing agent who conducted original performance testing services, or another performance testing agent.

Appeals

Project teams may (for a fee) challenge any findings of the WELL report or submit new features for review by submitting an appeal application. The appeal application allows for the submission of supplementary information and for an additional round of review. Each appeal is applicable to one feature; a separate appeal must be submitted for each feature being challenged. All appeals must be submitted within 180 calendar days after the date of issuance of the WELL report.

An appeal must provide an explanation of the basis of the appeal and identify any suspected errors. Upon receiving the appeal, GBCI will respond with an appeal review report within 20-25 business days.

Like the WELL report, a project may either accept or appeal the review report. Projects are limited to one subsequent appeal for each feature, which must be submitted within 90 calendar days of the date of issuance of the appeal review report.

RECERTIFICATION

To maintain certification, projects must meet requirements for recertification.

Certification is valid for three years. Project must file an application for recertification on WELL Online no later than three years after the date on which the project was awarded its initial certification.

Filing an application for recertification extends the validity of the project's original certification period for six months, during which time the project must satisfactorily complete the recertification process to determine that the building continues to perform to WELL.

If a project does not file an application for recertification before the expiration of the original certification period or fails to successfully obtain recertification within 42 months of receiving the initial certification, the project's WELL Certification will expire. Upon expiration of a project's WELL Certification, the project must immediately discontinue all use and display of the WELL Certified plaque or other signage, trademark and logo, and must not indicate or imply that the project is WELL Certified. The project will be removed from IWBI's list of certified projects.

Recertification Requirements

Projects are only eligible for recertification if all on-going monitoring, incremental progress and annual submission requirements have been met, as described in feature language (as applicable). GBCI will evaluate the project at recertification, at which point certification status may be revoked if projects have not been fulfilling their monitoring, progress and submission requirements.

Further, at recertification, projects must note if there have been any changes since their initial certification and provide documentation for any changes that would have an impact on certification status or level. As part of recertification, projects will fill out a form concerning any changes that have taken place since this initial certification. Based on this input, the form will describe which features must be newly validated through annotated documents or letters of assurance by the relevant professionals and which ones will automatically be considered met. Products installed and construction taking place since the initial certification will always require documentation. WELL Certified buildings must undergo performance re-testing by a performance testing agent.

At this point, projects may also elect to demonstrate achievement of new features, allowing advancement toward higher levels of certification. Projects can also qualify to have any limitations on attainable certification levels (as applicable, based on the specific options and features pursued by the project) and in this way attain higher levels of certification over time.

A project's certification may be compromised if WELL requirements have not been properly maintained or if the quality of the environment has declined below the performance thresholds required in WELL. All newly-pursued features require full documentation.

For the first recertification event following initial certification, a project can elect to be reviewed under either the version of WELL for which it achieved initial certification or any subsequently released version. Projects have the option to be reviewed under subsequent pilots, but are never required to utilize a newer pilot for recertification.

For all subsequent recertifications, a project will be reviewed under the version that is in place 12 months prior to expiration of the project's certification. A project also has the option to recertify under a more recent version.

Projects may preemptively begin the recertification process at any time before the certification period is up. All of the rules and timelines regarding acceptance of the WELL report apply. The new results from performance verification and the WELL report supersede the results from the prior certification.

Projects may change their boundary at the time of recertification (additional fees may apply). In this case, the new project will be evaluated as a whole under the new boundary. (The additional areas added are not evaluated for feature compliance or minimum program requirements in isolation.)

Annual Submissions

Following certification, projects must submit data annually to maintain their certification status (see *Award & Ongoing Monitoring*). These annual submissions will be reviewed during recertification.

WELL v2: Projects that use an approved performance testing agent for WELL to conduct on-going monitoring of environmental parameters may elect to be evaluated for recertification based on their annual submissions instead of scheduling a specific performance re-testing event. For on-going monitoring data to qualify for use for performance re-testing, projects must demonstrate that performance data was captured by a GBCI-trained performance testing agent. A WELL Reviewer will review and confirm that annual submissions aggregated across the reporting period attest to maintained performance in WELL (for more information on aggregating performance data, see the Performance Verification Guidebook). If on-going monitoring requirements have been met through other means, then the project has met its annual submissions requirements but must schedule performance re-testing with a performance testing agent for recertification.

Mid-cycle Reviews

Following initial certification, projects may submit for one review during any 12-month period to improve their certification score. This annual submission for review allows projects to submit documentation to GBCI for features they have achieved since initial certification without waiting for recertification, meaning projects may achieve more points in WELL on an annual basis. In these optional mid-cycle reviews, projects will be evaluated for achievement of the additional features only; projects will not be evaluated for all features, as is done at recertification. Since mid-cycle reviews are only for additional features and not all features, the project's timeline for recertification remains unchanged.

The opportunity for annual upgrades is available to all projects and is covered by subscription fees (additional fees apply to non-subscribers).

USE OF PROJECT INFORMATION

WELL requires the submission of extensive information related to each project. Collected information typically includes project and Owner identifying information, attestations, narratives, data, calculations, maps, drawings, specifications and other design, construction and operational-related information. This information may contain proprietary information, as well as valuable intellectual property including copyrighted materials and/or trademarks. By submitting this information, each project grants IWBI and its affiliates and their respective employees, agents, representatives and subcontractors a limited, non-exclusive and non-revocable license to access and view all information that is submitted in the application as necessary to perform an assessment.

IWBI also uses project data to educate and provide resources for WELL projects and others, showcase project strategies and promote WELL on a global scale. WELL-registered and certified projects are, by default, considered “public” projects and, as such, they are included in IWBI’s public WELL project directory. Inclusion in this directory allows the general public and members of the media to look up specific project listings and details, including the following: project name, project address, project type, registration date, identity of the owner, owner organization type, project team information, project gross square footage, date of certification and level of certification achieved, among other project identifying information. With the exception of information provided to IWBI’s and its affiliates’ employees, agents, representatives and subcontractors, IWBI and its affiliates will not distribute or publish any submitted plans, drawings or schematics pertaining to any project without permission.

All public projects also benefit from publicity opportunities: IWBI may use project data to create case studies highlighting a project’s features, reference a project on the website or to the media, or create other derivative works. Information that may be used for articles, project profiles, presentations or similar promotional pieces may include service providers, project team members, promotional or other project photographs, project strategies for certification, or quotations from team members.

A project may opt-out of the WELL project directory and publicity opportunities by electing to be a “private project” at the time of registration. See WELL Online for specific instructions in this regard. A private project means that the project name, street address and identity of the owner will not appear within the WELL project directory. Certain other non-project identifying information may be disclosed, including, but not limited to, the city and state in which the project is located and the total project square footage. All private projects that achieve WELL Certification will be prompted upon issuance of award, if any, to transition to public status. A project that wishes to remain a private project will need to re-confirm its private status at the time of certification.

For so long as a project maintains its election as a “private project”, the project cannot market or represent itself to the general public as having applied for certification, or as being certified or compliant, and no intellectual property including the WELL certification trademarks may be utilized or displayed in relation to the project. Project owners may change the privacy setting for a project at any time before acceptance of the final award, using functionality in WELL Online. Moreover, if it is determined in IWBI’s reasonable discretion that despite its election as private project, your project has been/is being marketed to the public as having registered for or received certification, it will be deemed implied consent given by you to GBCI or IWBI to consider your project as a public project.

Further development of the WELL program depends upon the collection, analysis and distribution of information pertaining to WELL design, construction and performance. IWBI and its affiliates may make internal use of any information that is submitted to IWBI – whether by a public or private project

– including, and not limited to, project performance data, and may publish this information to third parties, including the general public, in aggregated non-identifying form.

GLOSSARY

Alternative Adherence Path – Alternative solutions for meeting the intent of any WELL feature requirement. Projects may submit an Alternative Adherence Path proposal to IWBI to replace any requirement in WELL. Fees apply.

Appeal – Letter that outlines a project's disagreement with any finding of the WELL report, or of any decision regarding proposals for alternative adherence paths, curative actions, or innovation features. Appeals must be submitted to IWBI within 90 calendar days of the date of issuance of the WELL report or the appeal review report, as applicable.

Curative Action Plan – Document that outlines strategies a project will employ to address any unmet criteria as identified in the WELL report. These plans must be submitted to IWBI within 180 calendar days of receiving the WELL report and must detail a specific and feasible plan of action.

WELL Design & Operations Review (WELL D&O Review) – An optional review phase prior to Documentation Review during which projects may submit documentation attesting to design intentions and operational commitments, and narrative plans summarizing strategies the project intends to employ to meet performance criteria in WELL. A WELL Reviewer will evaluate documentation submissions during this phase and successful projects are awarded the WELL D&O designation.

Documentation Review – Encompasses preliminary and final review phases of documentation by a WELL Reviewer from GBCI that attests to design and operational elements in-place in a project. This review occurs after construction completion to ensure that documentation truly reflects on-site conditions.

Innovations – Features that allow projects to develop unique strategies for creating healthy environments. The proposals for these features must address a novel aspect relevant to a specific WELL Concept, with robust supporting literature from health and medical research. Separately, pre-approved innovations are also available for project teams to use.

On-going Monitoring – Activities required in certain features of WELL wherein projects engage in on-going measurements of environmental parameters.

Performance Testing – On-site component of the WELL process wherein an independent agent, trained in the testing protocols of the WELL Performance Verification Guidebook, conducts tests on environmental parameters, collects samples, submits them to labs and analyzes data.

Performance Testing Agent – An agent who is trained and qualified to conduct performance testing for WELL. This may refer to GBCI agents or individuals from other organizations who are trained and approved by GBCI.

Performance Review – GBCI review of performance testing data to verify that all testing and analysis is accurate and conducted in accordance with the WELL Performance Verification Guidebook.

Performance Verification – The final phase required for WELL Certification, consisting of performance testing and Performance Review.

WELL Accredited Professional (WELL AP) – A professional who has extensive industry experience and knowledge of the WELL process. Such professionals have successfully completed IWBI's WELL AP exam, and may be hired by a projects as consultants to guide successful certification.

WELL Online (projects.wellcertified.com) – Official online registration application and project management system for WELL. Project administrators must register projects in WELL Online and may delegate responsibilities over specific features to other project team members. All documents must be uploaded into WELL Online for review and approval.

WELL Report – Comprehensive report of the project which includes a feature-by-feature summary of whether or not the project successfully provided documentation to verify that each feature has been satisfied, or if the project has successfully performed to measurable criteria relevant for specific features. Made available via [WELL Online](#) for the project administrator to view.

WELL Reviewer – An agent from GBCI who reviews and approves all documentation and performance test results for WELL. WELL Reviewers are trained to understand proper adherence to testing protocols for evaluating WELL performance criteria and confirm that all design, construction, operational and policy documentation submitted by the project accurately attests to achievement of WELL features.