WELL™
PORTFOLIO

GUIDEBOOK

INTERNATIONAL
WELL
BUILDING
INSTITUTE™

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INTRODUCTION

The WELL Portfolio™ program enables organizations to enhance the places where people live, work, learn and play and to improve human well-being at scale. Organizations can demonstrate their leadership by applying the world's leading health-focused building standard—WELL—across multiple spaces in a streamlined and cost-effective approach. Designed to maximize the positive outcomes related to human health and well-being along with the value of projects, WELL Portfolio is a program for companies at the leading edge of the movement to improve global health.

WELL Portfolio and the WELL Building Standard

WELL Portfolio is rooted in the principles of the WELL Building Standard™ (WELL). WELL Portfolio members select which of their projects will make up their defined portfolio and then work to implement strategies from the applicable rating system across those projects. As such, much of this document builds on the processes and requirements of WELL v2 and the WELL Certification Guidebook. In situations where WELL Portfolio introduces a pathway that differs from that of a single-asset project outlined in the WELL Building Standard or WELL Certification Guidebook, this will be emphasized, and, in the event of any conflict, the WELL Portfolio Guidebook takes precedence.

ENGAGEMENT

Enroll

Enrollment signifies a portfolio owner's intent to engage in the WELL Portfolio program. The WELL Digital Platform (the "Platform"), accessible from wellcertified.com, is the official online registration application and project management system for the WELL program. Once the enrollment invoice has been paid and cleared, the organization is enrolled in the WELL Portfolio program. Enrollment in WELL Portfolio entitles the member to:

- WELL coaching support to help define the portfolio scope and identify efficiencies for pursuing features in WELL and integrating health and well-being strategies across the portfolio.
- Access to an online platform for portfolio-wide management of WELL scorecards.
- Complimentary IWBI membership at the Portfolio level for the length of the enrollment. See the IWBI membership page (wellcertified.com/membership/) for a list of benefits.

The enrollment period is six months and may be extended by an additional six months for a total of up to one year. If not subscribed to WELL Portfolio within 12 months of initial enrollment, an organization must pay an additional fee for a new enrollment period in order to remain in the WELL Portfolio program.

Subscribe

For the first term, the minimum commitment is a five-year subscription. Subscription can occur concurrently at the point of enrollment or anytime within the enrollment period, provided the member has defined its portfolio scope (see *WELL Portfolio Scope).*

A WELL Portfolio subscription includes:

- Review of documentation and performance testing results for features by Green Business Certification Inc. (GBCI), which contributes to:
  - o An overall WELL Portfolio Score™ for the defined portfolio.
  - o WELL Certification, recertification and/or Precertification designation for all qualifying projects within the defined portfolio.
  - o WELL Health-Safety Rating designation for all qualifying projects within the defined portfolio.
- Dashboard of portfolio and project performance.
- Opportunities for members to be recognized as leaders in health and well-being, from WELL Portfolio Scores to recognition for specific progress or accomplishments—in addition to communications guidelines and templates to promote WELL Portfolio participation and accomplishments.
- Dedicated coaching support to help members assess their portfolio on health and well-being strategies as well as identify opportunities for improvements and recognition.
- Complimentary IWBI membership at the Portfolio level for the duration of the subscription.

Organizations interested in reviewing pricing for a WELL Portfolio subscription should contact portfolio@wellcertified.com. Subscription costs do not include fees associated with onsite performance testing for relevant features, as these fees are assessed by the WELL Performance Testing Agent contracted by the WELL Portfolio member. WELL Portfolio members can also deploy in-house WELL Performance Testing Agents. See the *Performance Verification* section of this guidebook for details. Separate fees for other optional services may also apply.

WELL Portfolio Scope

During the enrollment period, the portfolio administrator (see *Roles and Responsibilities*) must enter all projects that meet the definition of the identifiable portfolio and may not unreasonably exclude properties from the portfolio to gain an unfair advantage in complying with WELL requirements. Examples of categories that could define a portfolio include:

- Geography
- Typology (use type)
- Ownership, or inclusion in a particular investment fund

During enrollment, members work with their WELL coaching contact to define the composition of projects within their portfolio. The defined portfolio must be approved by the WELL Portfolio member's coaching contact at IWBI. The portfolio member must accurately communicate the scope of the defined portfolio in all promotional or other public-facing materials and distinguish it from any other properties with the same owner. Further guidance regarding how to publicize your portfolio can be found in the Marketing and PR Guidelines for WELL Portfolio.

A defined portfolio must contain at least 10 projects, unless the member's total global portfolio contains fewer than 10 projects, in which case the minimum project count is two. New construction properties that qualify for inclusion in the defined portfolio may be added to the portfolio at any time throughout the design or construction phase, but their inclusion is only required at the point of substantial completion of construction (see also *WELL Portfolio Score Definition*). Similarly, completed projects with occupancy rates of less than 25% may be excluded from the portfolio definition. Note that a project in a defined portfolio that has not yet reached substantial completion may not submit or be assigned any feature documentation unless it is pursuing Precertification during that review cycle (see *Precertification* and *Feature Review*).

Adding and Removing Projects

A member's defined portfolio should continuously and accurately reflect the portfolio's population of properties. Thus, defined portfolios may change in size over time. If additional properties that qualify under the defined portfolio are acquired, they must be added to the defined portfolio within one year of acquisition. (Hence, they need not immediately impact the portfolio's overall metrics.) If properties are divested or otherwise leave the defined portfolio, they must be removed by the next review cycle (see *Feature Review*). WELL Portfolio annual subscription fees are assessed annually based on the current size of the defined portfolio.

Groupings and Sub-portfolios

Portfolio administrators may group projects within their portfolio to track progress, assess characteristics and assign documentation to selected subsets of their properties. These groupings can be based on any characteristics and need not adhere to the rules of defining a portfolio; as such, they will not be publicly displayed or given an official designation by IWBI.

If a defined portfolio includes a subset consisting of at least five projects that meet the conditions of a WELL Portfolio definition category, as outlined in this guidebook, those projects are eligible to be assigned a separate WELL Portfolio Score and listed on the associated WELL Portfolio leaderboard as a sub-portfolio. For example, if a global portfolio of 20 projects includes 10 projects in Europe, the performance of the sub-portfolio in Europe would be eligible for inclusion on the Europe leaderboard. Additionally, the entire portfolio's performance would be included in the overall leaderboard. WELL Portfolio administrators will be notified if their defined portfolio is

eligible for any public sub-portfolios, allowing them to opt in for inclusion in the associated leaderboards. See *Annual Rankings and Benchmarking* for more information.

WELL Versions and Programs

For clarity, the "WELL Building Standard" or "WELL" refers to the WELL Building Standard v1, the WELL Building Standard v2 and WELL Building Standard v2 pilot collectively. Where it is necessary to specify a particular version, this guidebook will refer to WELL Building Standard v2, WELL Building Standard v2 pilot (or v1) or WELL v2 (or v2 pilot or v1), as applicable.

To share documentation and to have review included as part of WELL Portfolio fees, projects in a defined portfolio must use WELL Building Standard v2 or WELL Building Standard v2 pilot. As a default, the quarterly addenda version of WELL that was current upon enrollment to the WELL Portfolio program will be applicable to all projects within the defined portfolio, including projects added to the portfolio after subsequent addenda have been released by IWBI. As with the case of single-asset projects, WELL Portfolio administrators may update any feature in use within the defined portfolio to a newer version of the feature from a subsequent addendum. Addenda updates for an individual feature must be applied at the portfolio level; projects within a portfolio may not utilize different addenda versions for a given feature.

Defined portfolios may contain both WELL v2 and WELL v2 pilot projects. However, each asset within a defined portfolio must pursue either WELL v2 or WELL v2 pilot. Projects using one rating system may not share documentation with those using the other, except using the WELL v2 Skybridge as follows:

- WELL v2 projects can use documentation submitted for WELL v2 pilot projects for features listed in Table 2.
- WELL v2 pilot projects can use documentation submitted for WELL v2 projects for features listed in Table 1.

Single-asset projects already registered to pursue WELL Certification may be included in the defined portfolio. Invoices already paid for registered single-asset projects will not be refunded, but any outstanding single-asset project invoices for projects that are included in a defined portfolio will be void, and all subsequent certification costs, excluding performance testing fees, will be included in the WELL Portfolio subscription. Separate fees for other optional services may also apply.

Projects in a defined portfolio previously registered for or certified under WELL v1 may continue to use WELL v1, but the project's documentation cannot be shared with the defined portfolio. (For details on how WELL v1 projects affect a WELL Portfolio's overall performance, see *WELL Portfolio Score*.) These projects are not accounted for in WELL Portfolio subscription fees, but subsequent single-asset project fees apply. Project teams may update their projects to WELL v2 for their certification or next recertification, as applicable, at which point they may pursue additional features, share documentation with the rest of the defined portfolio, and have their area accounted for in the defined portfolio's subscription fees.

ROLES AND RESPONSIBILITIES

Project Team Roles

Project team members will have distinct responsibilities as described below.

Portfolio Administrator

The portfolio administrator oversees the WELL Portfolio program process and coordination of documentation for the defined portfolio. The portfolio administrator is the primary point of contact and will be copied on all correspondence with IWBI and GBCI. This individual will also be the recipient of WELL reports following review of documentation and/or performance testing results. The portfolio administrator can be a WELL AP (WELL Accredited Professional), WELL consultant, the owner (see below), or another designated representative of the project team.

The portfolio administrator may assign one or more project administrators or portfolio sub-administrators to manage individual projects or groupings of projects within the portfolio, if applicable.

Owner

Owners are responsible for authorizing enrollment of the defined portfolio and the projects within it and will be required to validate various documents used to demonstrate that WELL features are satisfied. The WELL Portfolio Agreement will be sent to the designated portfolio owner by email for their eSignature.

An owner can be the entity that owns or has a right to possess, including as a lessee, the defined portfolio or a representative who is delegated responsibility by an entity or entities that own, possess or lease the properties within that portfolio. 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 or properties within the defined portfolio or a project within the portfolio, a single owner must be identified as the authorized decision-maker for purposes of the WELL program. 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 require validation by the 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, in place of the owner, play a role in affirming that design and operational requirements are met.

WELL AP (WELL Accredited Professional)

The WELL AP credential recognizes building industry professionals who are knowledgeable regarding the conceptual and applied frameworks of WELL and are experienced in its application. WELL APs can guide the member on the WELL Portfolio journey and individual projects through the certification process. Project teams are not required to include a WELL AP, but having a WELL AP as part of a portfolio or project team will help to address WELL requirements and qualifies projects for achievement of a pre-approved innovation feature in WELL.

WELL Coaching Contact

Upon payment of the enrollment fee, WELL Portfolio members are assigned a WELL coaching contact from IWBI to provide support and guidance to the portfolio administrator in achieving desired goals across the portfolio. Coaching contacts answer questions, share helpful resources and tools, and provide feedback and direction throughout the WELL Portfolio enrollment and subscription periods.

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

Testing Agents and Reviewers

Evaluation of WELL features involves the review of project documentation and performance testing results by GBCI. Performance testing results are gathered by a WELL Performance Testing Agent.

WELL Reviewer

After a WELL Portfolio administrator schedules the first review cycle, GBCI will assign a WELL Reviewer. The WELL Reviewer is the individual responsible for reviewing submitted documentation and performance testing results to confirm achievement of feature requirements.

WELL Performance Testing Agent

WELL Performance Testing Agents conduct performance tests on-site, complete spot checks and visual inspections, send samples to labs for testing, analyze data, and submit results for performance review by the WELL Reviewer. All WELL Performance Testing Agents work for GBCI or other approved WELL Performance Testing Organizations and have undergone training to evaluate on-site environmental parameters according to WELL testing protocols and equipment specifications. A list of approved WELL Performance Testing Organizations is available online at wellcertified.com/performance-testing. WELL Performance Testing Agents must demonstrate that they have no conflicts of interest with the projects for which they are providing performance testing services.

Documentation Requirements

The WELL Building Standard details the verification methods that are required to provide evidence that WELL features are met. WELL features are verified through documentation and/or performance testing results. The WELL Digital Platform is the official online project management system for the WELL program. This online platform is used to store all documents related to a WELL project or portfolio and to submit information for review by GBCI. All documentation must be submitted through the Platform. Documentation may be uploaded into the Platform as it is prepared by the project team.

In submitting documentation for a review cycle, WELL Portfolio project teams must indicate the features they are pursuing and whether those features apply across the entire defined portfolio, for a subset of projects within the portfolio, or for an individual project within the portfolio.

Documentation submission requires the following general documents:
- Identification of any projects within the defined portfolio that are targeting WELL Certification or Precertification in that review cycle.
- Confirmation of substantial completion of construction for any projects submitting documentation for any WELL features (unless such projects are targeting Precertification).
- Representative floor plans, as applicable, for any projects submitting performance testing results for any WELL features.

Scales of Documentation

WELL Portfolio members can utilize WELL verification methods traditionally applied to single-asset project certification efforts, as described in each feature. Additionally, the WELL Portfolio program provides opportunities to submit documentation at scale to provide efficiencies in the documentation process. The scales are described in detail below and summarized in Table 1.

Individual-scale Documents

The verification methods detailed were written to validate features for single-asset projects. These project-specific documents are Individual-scale documents; they are uploaded by a project team member and applied only to the project selected. Any project can use the Individual-scale verification method for any feature. For example, Individual-scale documentation methods might be applied if only one project in the portfolio is pursuing a feature or if a project is meeting a feature in a different way than the rest of the defined portfolio. All features in which the verification method is a performance test or on-going data report require Individual-scale documents.

Shareable Documents

WELL Portfolio teams can apply Shareable documents across multiple projects within a defined portfolio (see Table 1). For example, a corporate commitment documented by a policy document could apply to all projects within a defined portfolio; or, a mechanical engineer involved with several projects in the defined portfolio could use the same MEP letter of assurance to attest to the designs across those projects.

Shareable documents are uploaded by a portfolio administrator or other authorized individual into the portfolio member's document library for the relevant feature. This individual may assign it to all projects, some projects or no projects at all. In assigning the document, the individual is attesting that it applies as written to the project(s) selected. In addition, once a Shareable document is part of the document library, team members from individual

projects may select and assign it to their own project. Multiple documents may exist in the library for a given feature. For example, separate versions of a document may be created to apply to subsets within the portfolio.

Once GBCI successfully reviews a Shareable document, it is considered approved for all projects to which that document was assigned at the beginning of the review cycle. Project teams that subsequently assign the document to their project will receive credit for the relevant feature at the portfolio's next review cycle. Any changes to Shareable documentation as part of a review cycle require a reconfirmation that projects using the document continue to meet the updated documentation.

Guideline Documents

Guideline documents (or "Guidelines") are a special type of Shareable document that describes the requirements projects adhere to rather than the details of how a particular project has met the feature. They can be used to streamline documentation in instances when the verification method is specific to the conditions of an individual project: for example, a modeling report or an architectural drawing.

As with other Shareable documents, authorized team members upload Guidelines to the defined portfolio's document library and may assign the Guideline to any number of projects. In doing so, the team member is attesting that the project(s) selected is meeting the requirements laid out in the Guideline document. Project teams may also assign previously uploaded Guidelines to their project within the defined portfolio.

GBCI evaluates Guidelines for equivalency with the feature language; the Guideline must address feature requirements at a minimum. Because Guidelines outline requirements rather than demonstrate compliance with WELL features, a subset of projects to which the Guidelines are assigned will be required to provide additional documentation for the relevant feature (see *Auditing*).

Photographs

Photographs have been listed as the verification method for some features. Photographs provide visual evidence that certain design-based WELL features have been met on the site.

Photographs are considered a special type of document for the WELL Portfolio program. Rather than submitting a photograph for every relevant feature pursued, WELL Portfolio teams may indicate that they will pursue features requiring photographs in the WELL digital platform and only provide the actual photograph for the projects selected for audit (see *Auditing*).

Photographs must be date stamped and identify location. They may be taken by either project teams or a WELL Performance Testing Agent. (Note that this differs from a single-asset project that is not part of a WELL Portfolio, for which only photographs taken by a WELL Performance Testing Agent are allowed.)

Table 1: Scales of Document

Verification method	Scale	Subject to audit?
Owner LOA	Shareable	No
Contractor LOA		
Architect LOA		
Educational Materials		
MEP LOA		
Operations Schedule (or Operations & Policy document)		
Policy Document		
Technical Document (WELL AP credential)		
Annotated Map	Shareable (Guidelines)	Yes
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)		
On-going Data Report	Individual-scale	No
Performance Test		

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

Document Stages

Feature validation that contributes to a WELL Portfolio Score, to WELL Certification or to the WELL Healthy Safety Rating requires documentation based on as-implemented conditions, referred to as Implementation-stage documents. However, Precertification documentation can be based on plans for designs, operations or policies that are not yet in place; these types of documents are referred to as Intent-stage documents and indicate the plans to enact these strategies in the future. Precertification is an interim designation for projects that have plans or designs to achieve WELL features that are yet to be constructed or otherwise implemented. For more information, see *Precertification*.

Only Implementation-stage documents can be used for incremental achievement of WELL features.

PERFORMANCE VERIFICATION

Performance verification encompasses two stages. First, a WELL Performance Testing Agent will visit the site and conduct onsite performance testing. These results are submitted to GBCI so that the GBCI WELL Reviewer can complete a third-party review of the onsite testing results along with any other documentation that has been submitted. GBCI's review will determine whether a feature has been achieved. WELL Portfolio teams must undergo onsite performance testing and submit results for all individual projects for which performance-based features are being pursued.

Performance testing results are submitted concurrently with documentation during a WELL Portfolio member's review cycle (see *Feature Review*). Projects in the WELL Portfolio program are not required to have all documentation complete before undergoing performance verification (as opposed to the process outlined in the WELL Certification Guidebook for single-asset projects that are not part of a defined WELL Portfolio, which requires documentation approval from GBCI before undergoing performance verification).

The WELL Portfolio team may submit any completed performance testing results for projects within the defined portfolio for a review cycle; as with documentation-based features, a project does not need to pursue all performance-based features at the same time. For example, for the first review cycle, a WELL Portfolio team may elect to submit performance testing results for relevant performance-based features in the Water and Light concepts but not in the Air concept.

To undergo performance testing, a project must reach substantial completion of construction in all areas to be tested. For projects pursuing WELL Core Certification, this only refers to the base building; tenant spaces do not need to be complete. However, active construction of tenant spaces will likely have a negative impact on performance testing results for the project. For multifamily residential projects, the owner's scope of construction must be finished but the units do not need to be furnished or occupied.

To undergo performance testing, projects must also reach 50% occupancy and at least one month must have passed since the certificate of occupancy was issued. WELL Core and multifamily residential projects are exempt from these requirements.

Performance Verification Logistics

Performance test measurements span several environmental parameters, including performance-based features within the Air, Water, Light, Thermal Comfort and Sound concepts. During performance testing, an individual with authorized access to all areas of the project requested by the WELL Performance Testing Agent (as specified in the feature language or Performance Verification Guidebook) will need to be present so that performance tests and inspections may be properly conducted. For more information on performance testing protocols and the full list of parameters measured in WELL, see the Performance Verification Guidebook.

FEATURE REVIEW

During feature review, GBCI will conduct an examination of documentation and performance testing results to confirm compliance with the WELL feature requirements.

Project documents and performance testing results may be uploaded at any time. WELL Portfolio subscription fees include up to two review cycles per year, which are scheduled by the portfolio administrator. Additional review cycles may be scheduled; additional fees apply.

At each review cycle, GBCI will conduct a review of all documents and performance testing results that have been submitted for review via the Platform to-date for the defined portfolio. Documents submitted and reviewed during these review cycles can include:

- Implementation-stage documents to pursue features that will contribute to the WELL Portfolio Score and, if targeted, WELL Certification or WELL Health Safety Rating for individual projects within the defined portfolio.
- Intent-stage documents for any individual projects within the defined portfolio targeting the Precertification designation in that review cycle. Projects targeting Precertification do not need to have reached substantial completion of construction before submitting documentation.
- Annual reporting and/or feature reverification or recertification documentation (see *Maintenance of Achievements*).
- Results from performance testing (see *Performance Verification*).

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.

If any additional rounds of review are requested, additional fees will apply. Additional rounds of review will be completed within 20–25 business days of submission. To avoid additional fees, WELL Portfolio teams may postpone resubmission of documents requiring additional review until the next scheduled review cycle.

Once GBCI approves all documents and/or testing results related to a feature, all projects to which those documents were assigned are considered to be meeting that feature.

Once a review cycle has commenced, any changes made to documentation or performance testing results by the WELL Portfolio team in the Platform (other than to address comments from GBCI for the second round of review) will only be considered in subsequent review cycles.

Auditing

GBCI will audit project-level documentation in each review cycle in which projects use Guideline documents to check that feature requirements are being consistently met at the project level. If audited, the WELL Portfolio team will be required to provide project documentation for the applicable feature, utilizing the original single-asset verification method referenced in column 1 of Table 1. GBCI will not begin review until all audited project-level documentation is provided.

For each Guideline document assigned in a review cycle, the audit will affect the square root (rounded down) of the number of projects to which that document is assigned. Examples of sampling rates are shown in Table 2. The audited projects will be randomly selected from among those using each Guideline document.

Table 2: Example Rates of Auditing

Number of projects to which a Guideline is assigned	Number of projects selected for audit	Percentage of projects selected for audit
2	1	50%
5	2	40%
25	5	20%
50	7	14%
75	8	11%
100	10	10%
150	12	8%
200	14	7%
500	22	4%

When a portfolio administrator submits for a review cycle, the portfolio administrator will be notified as to which projects have been selected for each feature-level audit. The full Individual-scale documentation must be submitted for these projects (see *Feature Review*).

For example, if in a particular review cycle, 45 projects have been assigned a defined portfolio's Guidelines for M02 Part 1 and 10 have been assigned Guidelines for L05 Part 2, six of the projects pursuing M02 would need to provide full documentation for M02 (a professional narrative about how their project specifically incorporates nature), and three of the projects pursuing L05 would need to do so for L05 (the daylight model for their project). The projects selected for each feature audit may differ since the projects pursuing each feature's Guideline documents may not be the same.

Failure to submit audited documentation and/or meet the requirements of an audit will result in a loss of corresponding feature points for the project. Additionally, if a defined portfolio fails the audit of a particular feature multiple times in a single review cycle, further audits of additional projects may be required for the portfolio to be allowed to use the Guideline on any projects that review cycle (additional fees apply).

WELL REPORT

The WELL report will be issued after the WELL Reviewer has finished reviewing all features submitted in a review cycle. This comprehensive report will be available on the Platform within 20–25 business days of submission of the last round of review required (see *Feature Review*).

The WELL report will include the following sections:

- WELL Portfolio report on the features that have been achieved and for which projects as well as the calculation of the WELL Portfolio Score.
- WELL Certification, precertification or WELL Health Safety Rating report for any projects within the defined portfolio that have achieved these awards within the review cycle.

WELL Portfolio members that have not successfully achieved a targeted WELL feature may submit updated documentation or performance testing results during their next review cycle. Alternatively, the portfolio administrator may initiate curative actions to address any issues. See *Curative Actions and Appeals* for more information.

Once the WELL report is issued, the portfolio administrator or owner is required to either accept their WELL report via the Platform or initiate curative actions or an appeal within 180 calendar days. If the portfolio administrator submits for a subsequent review cycle or has neither affirmatively accepted the WELL report on the Platform nor initiated a curative action or appeal within 180 days of receiving it, the WELL report will be deemed final.

AWARDS

Once the portfolio administrator or owner accepts the WELL report, the features awarded will automatically be applied at the portfolio level and at the project level, as applicable.

Project-level Designations

Precertification

Precertification is an interim designation that can help project teams communicate their project's progress toward achieving WELL Certification by recognizing that design and operational intents are aligned with WELL requirements. For more information about the Precertification designation, refer to the WELL Certification Guidebook.

WELL Portfolio teams can pursue Precertification for existing properties or new construction, as applicable. Only individual projects may achieve Precertification; a portfolio cannot be Precertified.

Projects pursuing Precertification may use a combination of Individual-scale documents and Shareable documents. If using a Shareable document for a project that has not yet implemented the feature requirements, the project team can indicate that they are assigning it to their project as Intent-stage. (In the case of projects still under construction, this will always be the case.)

Projects may use both Intent- and Implementation-stage documents for Precertification. Features awarded based on Implementation-stage documents also contribute to the defined portfolio's WELL Portfolio Score. WELL Portfolio teams seeking Precertification for a particular project must submit all Intent-stage documents in a single review cycle—that is, there is no incremental review or achievement of Precertification.

Since documentation submitted to pursue Precertification is part of the WELL Portfolio's documentation review cycle (see *Feature Review*), there are no additional fees for a project within a defined portfolio to pursue Precertification.

WELL Portfolio teams that earn the Precertification designation for an individual project receive the right to use the Precertification mark pursuant to the IWBI Brand Guidelines and may promote the achievement in their marketing materials. The Precertification designation remains active until the project achieves certification, the documents its award is based on expire, or its associated WELL Portfolio subscription ends, whichever occurs first.

WELL Certification

WELL Certification signifies that a project has complied with all preconditions and achieved enough points through optimizations with Implementation-stage documents, including all relevant performance testing results. WELL Certification is denoted at specific levels corresponding to the number of points achieved.

WELL Portfolio teams seeking to achieve WELL Certification for an individual project during a review cycle must take two additional steps to confirm their feature verification methods are up to date and valid:

- Confirm that the documentation approved in any previous review cycle for the project is still valid (see *Maintenance of Achievements*).
- Submit performance testing results, unless GBCI has reviewed performance testing results for the project within the previous 12 months.

Only individual projects may achieve WELL Certification; there is no portfolio-level WELL Certification.

IWBI encourages project teams to promote their WELL Certification achievement through a variety of means and provides a suite of resources to support WELL Certified™ projects. Please consult the Marketing and PR Guidelines for WELL Projects for more information.

Portfolio-level Designations

WELL Portfolio Score

The WELL Portfolio Score is a metric that reflects the health-focused achievements of an entire defined portfolio of projects. The score is a single number (integer) from 0 to 100. The WELL Portfolio Score accrues through the achievement of features by projects within the defined portfolio.

WELL Portfolio Score Definition

The WELL Portfolio Score is the weighted average of the points achieved across all projects within the portfolio. Scores are weighted by the actual or expected number of occupants within the project. For projects with an unknown number of occupants, WELL Portfolio teams may use default occupancy assumptions, such as those used by LEED,[1] BREEAM[2] or other sources approved by IWBI. The resulting weighted average is rounded to the nearest integer.

While preconditions are not allocated points, projects that have not met all preconditions contribute a maximum of 49 points toward the WELL Portfolio Score, even if they have achieved more than 49 points through optimizations.

Table 3 shows an example of a defined portfolio and how the WELL Portfolio Score is calculated.

Table 3: Example WELL Portfolio Score (P)

[A] Project ID	[B] # Occupants	[C] Points achieved	[D] All preconditions achieved?	[E] Effective Score	[F] Weighted contribution
1	200	20	No	20	1.5
2	500	45	No	45	8.7
3	900	60	No	49	17.0
4	800	70	Yes	70	21.5
5	200	35	No	35	2.7
Total				**P =**	**51**

$$E = \begin{cases} if\ D = \text{yes} \rightarrow C \\ if\ D = \text{no} \rightarrow \min(C, 49) \end{cases}$$ *(Equation 1)*

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[1] LEED v4 Appendix 2, https://www.usgbc.org/credits/new-construction-existing-buildings-commercial-interiors-core-and-shell-schools-new-constr-3
[2] BREEAM UK 2018, Table 7.7

$$F = \frac{E_i \times B_i}{\sum B}$$ *(Equation 2)*

$$P = \sum F$$ *(Equation 3)*

Note that a WELL Portfolio Score above 50 does not indicate that the defined portfolio itself has achieved certification, nor does it indicate that all the projects within the portfolio are certified.

New construction projects that are not yet at substantial completion may be excluded from the calculation of the WELL Portfolio Score. However, the WELL Portfolio Score must be based on at least two projects; portfolios without two scorable projects will not be assigned a public score. (Members have the option to include incomplete new construction projects to reach the two-project threshold; however, those projects will contribute zero points toward the WELL Portfolio Score.)

For the purpose of calculating the WELL Portfolio Score, any previously certified WELL v1 projects (including v1 pilots) in a defined portfolio are considered to have 50 points for a Silver level of certification, 60 points for a Gold level of certification and 80 points for a Platinum level of certification. WELL v1 projects in a WELL Portfolio that are not certified contribute zero points toward the WELL Portfolio Score.

The WELL Portfolio Score is updated following the acceptance of a WELL report from a review cycle (see also *Annual Rankings and Benchmarking*).

Annual Rankings and Benchmarking

On an annual basis, IWBI will release aggregated information on the WELL Portfolio program, which may extend to rankings based on WELL Portfolio Scores and other leaderboards (see *Use of Project Information*). For the purpose of external benchmarking opportunities, if there are sufficient peer portfolios within a subcategory (defined as five or more publicly listed WELL Portfolios), IWBI may publish subcategory rankings and leaderboards. Subcategories may be defined by project typology, geography, sector or other categories as determined by IWBI. Subcategory leaderboards may include whole portfolios (for members whose entire defined portfolio fits a particular characteristic, e.g., WELL Core) or sub-portfolios from larger defined portfolios (see also *Groupings and Sub-portfolios)*.

Promotion of Achievements

WELL Portfolio members are encouraged to promote their achievements in their marketing materials, through press releases, on social media and through other avenues. See additional detail in the Marketing and PR Guidelines for WELL Portfolio. To validate any claims or achievements prior to public communication, project teams should reach out to their WELL coaching contact.

MAINTENANCE OF ACHIEVEMENTS

WELL Portfolio teams must keep documentation and performance testing results for the projects in their portfolio current to ensure they accurately reflect the design, operations, policies and performance of the defined portfolio and projects within it.

Feature Reverification

Each feature verification method, including documentation and performance testing results, is valid for three years from the date of approval as indicated in the WELL report. Portfolio administrators should regularly check the validity of documentation; six months prior to the expiration, the portfolio administrator and each project administrator utilizing that feature verification will be notified that the document or performance testing result is nearing its expiration and requires feature reverification. Submission of documentation for reverification of the relevant features is due on the three-year anniversary of the last approval or any time within the six months that follow, so as to align with regular review cycles.

For a document to remain valid, the WELL Portfolio team must affirm the submission remains accurate as applied to the denoted set of projects. Alternatively, WELL Portfolio teams can update any documents or performance testing results and affirm the updated strategies are in place for the denoted set of projects.

Shareable documentation is updated or confirmed by the portfolio administrator or other authorized portfolio team members. Individual-scale documentation is updated or confirmed by the responsible member of the project team. Performance testing must recur at least every three years and results must be resubmitted for any corresponding features previously awarded.

The WELL Digital Platform will indicate whether any documents or performance testing results have expired; in this event, any associated features are no longer considered to be met. WELL Portfolio teams can renew or replace expired documents and/or testing results during future review cycles to achieve the features again.

Feature reverification impacts the WELL Portfolio Score since the number of points achieved by each project contributes to the score.

Feature reverification also supports WELL recertification for individual projects within the defined portfolio. At the three-year anniversary of a project's WELL Certification, the project's certification status will be automatically renewed so long as its features are based on active (non-expired) documents and current performance testing results. If a project's three-year anniversary occurs during a review cycle, the project will maintain its certification status until that review cycle is resolved.

Note that because a project's certification is valid for three years, while its level of certification (e.g., Silver, Gold) may be upgraded through the award of additional features in subsequent review cycles, it can never be downgraded before the end of that period. As the WELL Portfolio Score is based on documents with varying deadlines for renewal, it is possible that for a time a project's contribution to the WELL Portfolio Score may correspond to a point value associated with a different level of certification. This may occur if some documents on which the certification is based have expired prior to the three-year mark for recertification.

For more information on the WELL recertification process for single-asset projects, see the WELL Certification Guidebook.

Annual Submissions

Certain features (generally those with on-going data reports as the verification method) require documentation submission to the Platform on an annual basis, which is described within the feature language.

These annual submissions include the following types of documentation, depending on features pursued:

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

To remain in good standing, project teams must submit required annual documents by the review cycle that follows the one-year anniversary of the feature's achievement and then every 12 months thereafter. Projects that do not have the required documentation by this time will no longer be considered in compliance with these features. Note that WELL Portfolio teams may use Guideline documents for proof of maintenance, allowing project teams to only provide on-going maintenance reports if selected for an audit (see *Auditing*).

In some cases, results from on-going monitoring of environmental parameters may be used in place of scheduling performance testing at recertification. Project teams that use an approved WELL Performance Testing Agent to conduct on-going monitoring of environmental parameters can elect to utilize these testing results to fulfill the requirements of applicable features that require testing every three years, as described in the *Feature Reverification* section. See the WELL Certification Guidebook for more information.

INNOVATIONS AND ALTERNATIVE STRATEGIES

WELL features are written to express linkages between elements of building design or organizational strategies and occupant health, wellness and/or comfort. WELL aims to include a set of universally applicable features that are feasible across all property types and contexts. However, the ways in which the built environment may impact health across diverse contexts are varied and overlapping.

In recognition of the complexity involved in comprehensively addressing health and well-being through the built environment and the myriad ways different project teams can advance health and wellness strategies for their populations, WELL provides opportunities for creativity through the following mechanisms:

- Alternative adherence paths (AAPs) are used by project teams wishing to deploy alternative strategies to meet the intent of an existing WELL feature.
- Innovation features are used by project teams wishing to receive credit in WELL for pursuing intents and strategies that do not have a precedent in an existing WELL feature.
- Equivalencies are used by project teams wishing to use standards, codes or regulations more appropriate to their local market than those referenced in the WELL Building Standard.

Once an AAP, innovation or equivalency is approved for a WELL Portfolio member, it may apply to any project within the defined portfolio that meets the criteria outlined in that approved document in future review cycles.

Alternative Adherence Paths (AAPs)

Project teams are invited to propose alternate approaches to satisfying WELL feature requirements. GBCI approves alternative adherence paths (AAPs) that meet the feature intent and are supported by cited scientific, medical and/or industry research. Teams can submit an AAP for any requirement of WELL through the Platform.

Each AAP submission must pertain to a single feature. An AAP can be assigned to multiple projects in the defined portfolio so long as the strategy proposed is identical across all projects. WELL Portfolio AAPs can apply to multiple projects within the portfolio, even if they are not located at the same site and even if the AAP is not an organization protocol (as required for projects that are not part of a WELL Portfolio). Note that depending on the AAP submission, it is possible that the proposed strategy is approved for multiple projects to use but that each project must still have individual, project-specific documentation to satisfy the feature; in these cases, the ruling will indicate what additional documentation is required.

Each WELL Portfolio member receives 10 free AAPs per year; subsequent AAPs may incur additional fees. A portfolio administrator may retract an AAP submission by emailing the WELL coaching contact with a request. The AAP submission will not be counted toward the free AAPs if the request to retract is received within 48 hours of original submission.

AAPs may be submitted at any time. The ruling for the AAP will be updated on the Platform within 10–15 business days after submission. If a clarification or additional information is required, a mid-review clarification (MRC) request will be issued by GBCI. The portfolio and/or project administrator will have 10 business days to respond to the MRC request before the review will resume. The AAP ruling will be issued within 10 business days of the MRC response. If the WELL Portfolio team does not respond to the MRC request, the AAP ruling will be issued within 10 business days of the deadline. If a member submits an AAP after a review cycle has begun, that AAP cannot be used as part of that review cycle.

While AAP submissions will be kept private, a summary of an approved or disapproved strategy may be published; if an AAP has broad application, the strategies described in the application may be published as a precedent-setting AAP and released through IWBI-issued quarterly addenda.

Innovation Features

Innovation features pave the way for project teams to develop unique strategies for creating healthy environments. A proposed innovation feature can relate to any of the WELL concepts through Feature I01. 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.

Innovation submissions must be supported by sufficient rationale based on cited scientific, medical and/or industry research. Innovation proposals must be submitted as part of the feature review phase via the Platform. 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. Project teams that wish to submit an innovation proposal outside of the review cycle may submit the innovation as an AAP.

Innovation submissions can be assigned to multiple projects within a defined portfolio to indicate the selected projects are implementing the strategy described.

Portfolio members may propose more than 10 innovation features at the portfolio scale, but each project can earn a maximum of 10 points for innovation features.

Equivalencies

Depending on the location of the project, different laws, regulations, codes or programs (each referred to as a "reference") may be more relevant than the reference in the WELL feature language.

In these cases, IWBI invites proposals for equivalencies that 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 in the project's market compared to the reference in WELL.

Members do not need to specify which projects will use the equivalency when creating the submission, since equivalency rulings are defined by the references involved and are never project-specific. Approved equivalencies will be published by IWBI on a monthly basis for use by other WELL project teams.

CURATIVE ACTIONS AND APPEALS

The WELL report will outline the features that have been approved and the projects for which they have been approved.

After the WELL report is issued, the portfolio administrator or owner must either accept the WELL report or initiate curative action or an appeal. Curative action is available for members to undertake corrective measures to address unmet performance testing criteria and/or documentation requirements. Appeals are available for WELL Portfolio teams that wish to contest findings of the WELL report, submit new features for review, or submit supplementary information for an additional round of review.

Fixed baseline fees are associated with curative action requests and appeals. Additional fees apply and vary depending on the WELL features in question and whether retesting by a WELL Performance Testing Agent is necessary to confirm compliance with WELL requirements. For more information, refer to the WELL Certification Guidebook.

Instead of using a curative action or appeal to pursue additional features or submit additional documentation, WELL Portfolio teams may elect to submit such documents in their next review cycle.

USE OF PROJECT INFORMATION

WELL Portfolio members elect for their defined portfolios to be public or private upon enrollment in the program; members can also elect to make individual projects within their defined portfolio public or private. See the Platform for specific instructions. A private defined portfolio's status can be changed to public at any point by the portfolio owner. All public WELL Portfolio members benefit from publicity opportunities, including being listed in the WELL organizational directory. The organizational directory includes the names of public WELL Portfolio members and a number of other details related to their involvement with the WELL Portfolio program and subsequent achievements.

A public WELL Portfolio member may opt out of having its WELL Portfolio Score publicly disclosed by IWBI. In this case, the score will be listed as "private" and the portfolio will be listed at the end of any list sorted by score. Public WELL Portfolio members with private scores cannot market or represent their scores publicly.

A private WELL Portfolio member will not have its name, project inventory and the identity of the owner appear within the WELL organizational directory. If a WELL Portfolio is private, the member cannot market or represent itself to the general public as being part of the WELL Portfolio program, and no IWBI intellectual property may be used or displayed, including the WELL Portfolio Score.

If it is determined according to GBCI's or IWBI's reasonable discretion that a private WELL Portfolio member has been or is being marketed to the public as being a member in the WELL Portfolio program or listing their WELL Portfolio Score, then, following notice to the portfolio owner, the defined portfolio and/or WELL Portfolio Score will be deemed public.

Aggregate WELL Portfolio Information

Further development of the WELL program depends upon the collection, analysis and distribution of information pertaining to WELL design, operations and performance. IWBI, GBCI and their affiliates may make internal use of any information that is submitted to IWBI and/or GBCI—whether by a public or private portfolio—including but not limited to project performance testing data.

In addition to GBCI's review for purposes of assessing a defined portfolio or project, IWBI uses portfolio or project data to educate and provide resources for WELL projects and others, showcase project strategies, and promote WELL on a global scale; use of this data (other than for purposes of assessing a portfolio or project) will be on an aggregated basis that does not identify a defined portfolio unless the portfolio owner consents to such data being used for these additional purposes.

IWBI may publish information pertaining to the WELL Portfolio program to third parties, including to the general public, in aggregated, non-identifying form. For instance, IWBI may publish the global average WELL Portfolio Score of all members, using the scores and sizes of private portfolios to calculate that average. Information that may be used from a private WELL Portfolio will not identify such private portfolios and will only be used as part of published statistics if there are at least five portfolios and at least two private portfolios in the cohort being described.

For additional details on how IWBI, GBCI and their affiliates may use portfolio and project information in the review process or for information on the "public" or "private" status of individual projects, refer to the WELL Certification Guidebook.

GLOSSARY

Alternative Adherence Path: Alternative solution for meeting the intent of any WELL feature requirement. Projects may submit an alternative adherence path (AAP) proposal to IWBI to replace any requirement in WELL.

Appeal: Letter that outlines a project's disagreement with any finding of the WELL report or any decision or submission of additional features or documentation following the second round of documentation review. Appeals must be submitted to IWBI within 180 calendar days of the date of issuance of the WELL report or other communication of the ruling, 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.

Document Library: Part of the WELL Portfolio team's program management tool where documentation for features and performance testing results are stored for feature review.

Feature Review: Review period that encompasses preliminary and final review phases of documentation and/or performance testing results by a GBCI WELL Reviewer that attests to design and operational elements in-place in a project(s).

Innovation Features: Features intended to advance the mission of WELL by allowing projects to develop novel strategies for creating healthy environments or to enact strategies that increase awareness of WELL program achievements.

New Construction: State of a property while and after it undergoes initial construction, substantial renovation or other large-scale work that makes it unfit for regular occupant 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 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: A required component of WELL Certification, consisting of performance testing and performance review.

Project: A property enrolled in the WELL program. This can be an entire building or an interior space.

Review Cycle: The process by which GBCI reviews all documents and performance testing results that have been submitted by a WELL Portfolio member since the previous review cycle.

Substantial Completion: The point in the construction or renovation process (as applicable) where the project is sufficiently finished so that the owner can occupy or utilize the space for its intended use.

WELL AP (WELL Accredited Professional): A professional who has extensive knowledge of the WELL process and can help guide projects towards achievement of their WELL goals.

WELL Digital Platform ("the Platform"): Official online registration, application and project management system for the WELL program, located at projects.wellcertified.com. Portfolio administrators define their portfolio in the

Platform and may delegate responsibilities over specific features to other portfolio or project team members. All documents must be uploaded to the Platform for review and approval.

WELL 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.

WELL Report: Comprehensive report of the defined portfolio, which identifies the features that have been successfully achieved by specific projects and the projects (if any) that have achieved Precertification or WELL Certification, as well as the portfolio's WELL Portfolio Score. The WELL report is made available via the WELL Digital Platform for the portfolio administrator and owner to view.

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