

WHY WELL

THE HEALTHY BUILDINGS MOVEMENT



Town of Brookfield Resource Guide to WELL
Certification - BOE meeting 10.21.2020



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WELL IS FOR PEOPLE



WELL is a health-based, evidence-based, sustainable building standard that uses public health research to enhance human health & well-being for all populations.

01 WELL at a Glance

01.1 Why WELL?

WELL is the leading tool for advancing health and well-being in buildings globally. We spend 90% of our time indoors, and this has a profound impact on our health and performance. WELL incorporates evidence-based research on the built environmental factors that impact human health into a groundbreaking certification program developed using the latest scientific, medical and industry findings.

01.2 Scope of WELL

The WELL Building Standard consists of 10 Concepts and 108 Features. Certification is available at the Silver, Gold or Platinum level. With a flexible, points-based framework, the WELL Building Standard can be incorporated into any project.

01.3 Who's Involved?

The WELL Building Standard was first launched in 2014. Today, WELL is administered by the International WELL Building Institute (IWBI), a public benefit corporation. WELL is currently in its second generation (WELL v2).

01.4 Benefits of WELL

1. Exemplify your commitment to sustainability, health and wellness.
2. Attract new families to Town and solidify existing residents' commitment to the community.
3. Attract and maintain high-quality staff.
4. Continually improve and lower expenses by annual tracking of environmental data.
5. Provide a vehicle for long-term accountability and transparency for the Town and Administration.
6. Lead the way for WELL Certified schools in Connecticut

01.5 Cost of WELL

Depending on the selected fee structure, single cycle or a subscription model, the estimated upfront and annual costs of WELL Certification are:

| | Single Cycle | Subscription |
|-----------------------------|------------------------------|----------------------------------|
| | ~\$32,500 initial costs | ~\$18,000 initial costs |
| Annual fee: \$0 | | Annual fee: \$3,000 (5-yr model) |
| Recert. fee: ~\$1,700** | | Recert. fee: \$0 |
| Perf. V: ~\$4,200 budgeted* | | Perf. V: ~\$4,200 budgeted* |
| | ~\$5,900 annual costs | ~\$7,200 annual costs |

EVIDENCE-BASED RESEARCH



The buildings where we live, learn, work and relax are profoundly impacting our health, well-being and productivity.

Health

Thinking

Perform.

02 Introduction to WELL Certification

02.1 What is LEED, and how is WELL different?

The goal of any sustainable building standard is to challenge our buildings to perform better, reduce waste and lower emissions. These standards provide architects with a road-map to increased energy efficiency and a reduced carbon footprint. Depending on the rating system, buildings can be 30% better than code, 100% self-sustaining, or somewhere in-between. In some cases, buildings can even produce more energy than they use.

The leading sustainable building standard globally for the past two decades has been the LEED Rating System. LEED stands for “Leadership in Energy and Environmental Design” and is a prescriptive, points-based, sustainable building standard. Development for LEED began in 1993 by the Natural Resources Defense Council (NRDC) and today LEED is administered by the United States Green Building Council (USGBC). It is still being used as a benchmark for local and even national codes. In Connecticut for example, following the High Performance Building Standards for state projects yields the sustainable equivalent of a LEED Silver certification.

WELL is both similar to and different from LEED. As a sustainable building standard, WELL aims to minimize our negative impact on the environment. However, WELL is unique in its emphasis on maximizing the human experience. While LEED primarily concerns itself with the building’s relationship to the environment, WELL focuses on the relationship of people to the building. WELL is for PEOPLE.

02.2 Development of the WELL Building Standard

WELL is not an acronym, though as its name suggests, the WELL Building Standard emphasizes human health and well-being. With a holistic, performance-based, points-based approach, this sustainable building standard incorporates public health data and evidence-based design strategies in addition to strict sustainability goals.

Development for WELL began with a company called Delos Living LLC, and the creation of the International WELL Building Institute (IWBI). The WELL v1 Building Standard was launched in 2014 following years of research by leading physicians, scientists and industry professionals. Today, WELL is administered by the IWBI, a public benefit corporation, and is in its second generation - WELL v2.

02.3 What are the goals of WELL Certification?

WELL is an investment in our most important resource - people. The goals of WELL are to:

- Prioritize health and well-being,**
- Foster a shared vision for health,**
- Recognize opportunities to be a leader,**
- Exemplify your commitment through action.**

02 Introduction to WELL Certification

02.4 Components of the WELL Building Standard

The WELL Building Standard takes a comprehensive approach to well-being across 10 Concepts and 108 Features.

10 Concepts

The 10 Concepts of WELL are:



108 Features

The 108 Features of WELL are distributed among the 10 Concepts. They comprise the points-based checklist, or scorecard, which is the road-map to certification. In Nourishment, some Features include:

| Nourishment | | 2 | 12 |
|-------------------------------------|---|---------------|---------------|
| | | Preconditions | Optimizations |
| N01 Fruits and Vegetables | Promote the consumption of fruits and vegetables by increasing the availability and accessibility of fruits and vegetables. | PRECONDITION | |
| N02 Nutritional Transparency | Help individuals make informed food choices through nutritional labeling and allergy information. | PRECONDITION | |
| N03 Refined Ingredients | Help individuals avoid highly processed foods and refined ingredients. | | OPTIMIZATION |
| N04 Food Advertising | Encourage the selection and consumption of healthier food choices through advertising and messaging. | | OPTIMIZATION |
| N05 Artificial Ingredients | Help individuals avoid artificial colors, flavors, sweeteners and preservatives in foods and beverages. | | OPTIMIZATION |

Preconditions and Optimizations

The example above also illustrates which of the 108 Features are mandatory for certification and which are optional. If a Feature is a Precondition (P), then it is required for any level of WELL Certification. If these Preconditions are not fully met, the project cannot be WELL Certified regardless of how many other Features are achieved. If a Feature is an Optimization, then it can be pursued or ignored by the project team. This framework allows for a baseline, or certification threshold, while providing teams the flexibility to adapt WELL to their specific project demands and opportunities. There are minimums and maximums to the number of Features that can be pursued within each Concept to ensure the comprehensive approach to health and well-being is maintained.

02 Introduction to WELL Certification

Levels of Certification

Any project can become WELL Certified, whether new construction or an existing building, a tenant fit-out or a core and shell project. While each of these projects takes a different pathway towards certification, the same three levels await each one:



WELL Silver Certification requires that all Preconditions are met, and a minimum of 50 points are achieved in Optimizations.

WELL Gold Certification requires that all Preconditions are met, and a minimum of 60 points are achieved in Optimizations.

WELL Platinum Certification requires that all Preconditions are met, and a minimum of 80 points are achieved in Optimizations.

Tracking Certification Levels

The online dashboard and dynamic scorecard allows project team members to closely monitor progress and adapt as needed to ensure certification. This is particularly important if a project is targeting a specific certification level. Projects are allowed to submit documentation for up to 100 points total across all 10 Concepts. Through the Performance Verification process, as some Features are met or missed during testing, the actual number of points achieved is documented in the WELL Report.

Performance Verification

WELL is a performance-based standard, and requires that every project undergo Performance Verification. Verification is conducted by a WELL Performance Testing Agent or a GBCI approved testing agency, and reveals how many points the project successfully achieved.

Curative Action, Appeals and Alternate Adherence Pathways

There are always variables to field testing, and the process of taking a project out of digital simulation and into the complexities of the real world can reveal these unknowns. This is why WELL has incorporated Curative Action, Appeals and Alternate Adherence Pathways (AAPs). Each of these avenues gives project teams a second chance at certification should Performance Verification deliver fewer achieved points than is desirable. Curative Action gives teams the opportunity to revise the condition and re-test. Appeals give teams the opportunity to challenge the findings and prove compliance. Alternate Adherence Pathways allow teams to take a different

02 Introduction to WELL Certification

Annual Submissions and Recertification

approach to compliance while demonstrating that the intent of the Feature is intact, and that their approach is validated by cited scientific, medical and industry research.

One of the goals of WELL Certification is to exemplify your commitment to sustainability, health and wellness through action. By monitoring and continually improving the building, performance is enhanced, costs can be reduced, and new opportunities may reveal themselves. This innovative mindset is at the core of the Annual Submissions and Recertification requirement.

Annual Submissions are only required by certain Features in WELL. Often, these are spreadsheets that document green cleaning schedules, measured air and water quality, or operations/maintenance reports for HVAC systems.

Recertification occurs every three years and can involve a fee. Performance Verification is required as well. Through Recertification, a project learns if it has been able to maintain its standing as a WELL Certified Building. Some projects even use these checkpoints as an opportunity to advance to a higher level of certification, if they have been able to implement new sustainable features or health-focused policies.

02.5 Roles in WELL Certification

Pursuing WELL Certification is a collaborative effort, involving the owner, members of the project team, and partners at IWBI. Once a project has registered, there is support from IWBI every step of the way.

Owner - The owner is at the center of all decision-making to ensure their vision and needs are maintained. They authorize registration, validate documentation pertinent to their operational policies, and sign a certification agreement acknowledging their commitment to uphold WELL Building standards.

WELL Coaching Contacts - Assigned at registration, guides the project through certification, supports the Owner, Project Administrator and WELL AP.

WELL Performance Testing Agents - Conducts performance tests, sends samples to the lab for testing, and submits results for Performance Review by the WELL Reviewer.

WELL Reviewer - Third-party individual assigned by GBCI to assess documentation submission and performance verification for compliance.

WELL Accredited Professional (WELL AP) - Project team member knowledgeable about WELL and able to help guide the project towards certification.

Project Administrator - Manager overseeing the WELL process, QA/QC, ensuring documentation is complete and accurate.

03 Benefits of WELL Certification



Benefits of designing for wellness:

1. Improve health and well-being of students, teachers and staff
2. Maximize performance of staff
3. Reduce absenteeism
4. Enhance building performance and operating costs
5. Discover new opportunities for learning-centered environments

Benefits of WELL Certification:

1. Exemplify your commitment to sustainability, health and wellness
2. Attract new families to Town and solidify existing residents' commitment to the community
3. Attract and maintain high-quality staff
4. Continually improve and lower expenses by annual tracking of environmental data
5. Provide a vehicle for long-term accountability and transparency for the Town and Administration
6. Lead the way for WELL Certified schools in Connecticut

03 Benefits of WELL Certification

03.1 Connections to the curriculum

What if a building could also be used as a teaching tool for environmental stewardship? By connecting the sustainable and WELL design principles to the curriculum, students have the opportunity to protect and care for the surrounding natural landscape, plant native species to support pollinator pathways, learn outdoors in protected courtyards, go for a nature walk, see rainwater harvested in rain barrels and filtered in bio-retention basins, and watch the seeds they planted grow into healthy food. An on-site “Learning Garden” further integrates educational opportunities with a management plan involving the state protected species and wetland areas on site. Moments spent in nature, or moments spent in play, can restore focus and strengthen interpersonal relationships.

This not only fosters an ecological mindset, but also skills like inquiry and project-based learning. Using the building and site in this way provides teachers with a living laboratory to engage in projects that study natural systems but also built ones - from monitoring the internal MEP systems to analyzing the efficient building envelope, sun patterns, ICF construction and other passive design strategies such as high R-value in walls and roofs, sizing and placement of glazing, and daylight harvesting.

03.2 Impacts of the built environment

If the built environment impacts student learning so significantly, what are the components of a best-designed classroom? Some of the most influential ones are: natural daylight, visual connection to nature, harmony of colors, flexibility, and a sense of belonging or ownership.

Connection to nature

In response, classrooms in the New Elementary School have a view to nature, with windows and skylights placed in locations that invite natural daylight and prevent glare. The interior design promotes “Ecosystems”, serving to bring colors and graphics from nature indoors while also building a sense of community among each grade level. Student work could be displayed throughout their neighborhood corridors to increase feelings of ownership and belonging. Tree forms are a playful nod to the outdoor world, while murals at classroom wing nodes spark delight.

Indoor air quality

According to Schools for Health, a research platform maintained by the Harvard University T.H. Chan School of Public Health, “Inadequate ventilation has repeatedly been found to affect student health, thinking and performance. Low ventilation rates have been associated with asthma symptoms, absenteeism from respiratory infections, more frequent nurse visits, fatigue, impaired attention span and poorer performance on math and reading tests.”

Now more than ever, air quality is important for our schools.

03 Benefits of WELL Certification

Noise reduction and thermal comfort

Keeping the relative humidity levels of the mechanical system to a maximum of 60%, and monitoring them during the year, can help to support the health of building occupants by reducing the growth of microbial pathogens which can sometimes cause respiratory irritation and allergies. Proper humidity control can also reduce the degradation of building materials and ultimately have a positive impact on thermal comfort.

The other component to a healthy learning environment is an increased supply of fresh air and proper exhaust of contaminated air particularly from spaces where odors are present. By simply ensuring proper separation of intake and exhaust, the risk of recirculating stale air is mitigated.

Often, the two major complaints around traditional HVAC systems is noise and lack of individual control. What if there was a system that could mitigate these issues and be more energy efficient? The answer is chilled beams, and they are being used in the New Elementary School along with radiant heating solutions.

Noisy learning environments are the result of exterior and interior noise pollution. If the building envelope and glazing system is poorly designed, and the building is sited too near roadways and overhead flight paths, students suffer from the effects of exterior noise pollution. They can even carry these effects home with them, negatively impacting sleep cycles.

Interior noise pollution is largely a factor of the HVAC system and can yield high stress and low achievement scores if students are unable to hear the instruction. Physically, students can suffer from headaches, mental fatigue, distraction or anxiousness.

Chilled beams are quieter than the traditional HVAC system and offer greater individual control. Students are able to hear instruction more clearly and benefit from increased thermal comfort. From an energy efficiency standpoint, chilled beams can save money on heating and cooling costs - they have been shown to reduce reheat by 50% and annual fan energy by 30-40%. Chilled beams utilize water instead of air as a heat transfer medium. With the specific heat capacity of water in this application being four times better than air, this explains the increased efficiency. Chilled beams are typically low maintenance and support a flexible classroom layout that may be frequently rearranged to accommodate different lessons or learning styles.

04 Your Questions Answered

- 04.1 What does it take to achieve WELL Certification?**

To achieve WELL Certification, the project team will be assembling documents for IWBI review. The Owner will be involved in this process, particularly when it comes to evaluating which policy-based Features can be pursued. Of those chosen policy-based Features, some will require a Letter of Assurance (LOA) from the Owner. In addition to these conversations, the Owner will evaluate and approve other Features on the scorecard, particularly those that require Annual Submission. Finally, the Owner has a financial responsibility as fees are due to WELL at registration, document submission, performance verification and certification. In addition to these, with the help of WELL and the project team, the Owner has the opportunity to promote their sustainable design achievement and educate others on the benefits of WELL Certification.
- 04.2 What is involved in writing an Owner’s Letter of Assurance?**

A Letter of Assurance (LOA) is a formatted document provided by IWBI that identifies every Feature requiring Owner verification. It does not need to be drafted from scratch by Owners. Simply check a box beside those Features being pursued on the project. Leave blank and Features not being pursued. Sign and date the last page, and that completes the process. See Appendix A for an example of a WELL v2 Letter of Assurance template.
- 04.3 What is required to maintain WELL Certification?**

To maintain WELL Certification, the Annual Submissions must be delivered to IWBI and the project must be re-certified every three years. Performance Verification is required as part of the recertification process, and incurs cost. Depending on the fee structure, there could be a cost associated with recertification.
- 04.4 What is involved in the Annual Submission process?**

Not all Features require Annual Submission. For those that do, Owners will be required to submit spreadsheets or other logs that demonstrate careful maintenance, and when appropriate, compliance with certain baseline measurements. One example is air filtration. To verify that the system is operating as designed, IWBI requests that records of air filtration maintenance be submitted on an annual basis. This spreadsheet includes the date of service, the location of the filter in the building, the product information, who conducted the maintenance, and any notes or actions taken. See Appendix A for an example of a WELL v1 Annual Reporting Package Template.
- 04.5 How many other schools in our region are WELL Certified?**

WELL has an online Project Directory which shows both Registered and Certified projects. Currently, there are 7 schools listed across the United States. Of those, 2 are Certified, and both are located in California. On the East Coast, 1 project is Precertified. Since schools are newer adopters of WELL Certification, numbers are expected to grow.

04 Your Questions Answered (continued)

- 04.5 (continued)** Excluding schools, Connecticut has 7 projects listed in the WELL Project Directory with 1 Certified in Stamford, CT. Massachusetts has 37 projects listed with 8 Certified.
- 04.6 Is there a case study with similar requirements to our school project?** Schools are generally newer adopters of WELL Certification. As such, there are few case studies available. However, the desire for WELL Certification in the education sector is clearly growing rapidly. Earlier this year, a generous donation from a corporate sponsor to the Orrville School District in Ohio will allow them to pursue WELL Certification for all their schools, in light of the COVID-19 crisis. They will be the first K-12 school district to enroll in the WELL Portfolio program which certifies multiple buildings under one umbrella.

The current largest WELL Certified school is a Precertified project in Maryland - Sandy Spring Friends School - though only 42,000 SF and \$14M project cost. This upper school has been designed "net-zero ready" in addition to its pursuit of WELL Certification. The school's values, coupled with their desire for a strong innovative presence, drives their commitment to sustainability, health and wellness.

A project that has incorporated WELL design principles but is not yet certified, is the Chinook Trail Middle School in Colorado Springs, CO. This \$41.7M project is 125,000 SF and can accommodate 1,080 students. It features high-performance classrooms, flexible learning spaces and furnishings, Colorado-inspired biophilic design, extensive daylighting, outdoor classrooms, a Curiosity Center, and a Learning Stair. It was completed in 2019.
- 04.7 What are some of the design strategies used in the building that help towards WELL Certification?** The Brookfield New Elementary School uses radiant heating, displacement ventilation and increased fresh air to name a few of the systems contributing to Air and Thermal Comfort. Enhanced daylight, occupant control of lighting and proper acoustic separation contribute to Light and Sound. Access to nature, accessible design and mindful eating contribute to Mind, Community and Nourishment, while proper placement of drinking fountains, physical activity spaces, and material selection contribute to Water, Movement and Materials.
- 04.8 What will be required of the school Principals, teachers, students and staff?** The workload to maintain certification can be accomplished either internally, or externally through the engagement of a WELL Performance Testing Agent. Projects that use an approved WELL Performance Testing Agent to conduct ongoing monitoring may request to use their Annual Submissions for recertification in lieu of Performance Verification. This could be advantageous for several reasons. It would take the responsibility of scheduling, monitoring and recording ongoing maintenance off the shoulders of the

04 Your Questions Answered (continued)

04.8 (continued)

Principals, staff or BOE. It would mitigate the need for a large re-testing event every three years, and the school would receive continual feedback from a WELL approved source on the status of their project - no surprises when it comes time to re-certify.

Internally, if the Principals, staff or BOE decide to monitor operations themselves, they should prepare to manage ongoing maintenance tasks (many of which occur on a monthly basis), collect and store this information until it is time to submit it to IWBI, and submit it within the allotted timeframe. They should also stay up-to-date on any revisions made to the WELL Building Standard that may result in modified compliance thresholds.

Managing the Annual Submission process internally does come with an increased workload but it also affords the benefit of engaging students in the process. If there are Features safe for students to monitor, or stewardship events that can be arranged annually to connect them with their school's sustainable goals, this instills a positive message of pride and responsibility for their learning environment and the natural world as well.

04.9 What will be required of the BOE and the MBC?

In projects with multiple possible stewards, WELL will require the selection of one person as a point of contact. The BOE, MBC, Principals, teachers and staff will have to make this decision. Once made, this individual becomes the authorized decision-maker on behalf of the Owner in the eyes of IWBI. While multiple users can have access to the project dashboard online, the primary point of contact will shepherd the Annual Submission and Recertification processes, along with any other communication to IWBI. Financially, the MBC has included initial certification in the project budget, but the BOE will be required to fund recertification for the project every three years.

04.10 What research and evidence-based studies are available?

The benefits of designing for health and wellness have been an area of scientific study for leading research institutions - most notably, Harvard University. Their T.H. Chan School of Public Health has a unique program dedicated to this field. It is called "For Health". The program has developed The 9 Foundations of a Healthy Building, the COGFX study which correlates CO2 levels and cognitive performance, and Schools For Health which connects student health, thinking and performance to built environmental factors. Internationally, the University of Salford conducted a study of several schools in the Blackpool school district and found the built environment can account for 25% of learning progress. See Appendix B for a selection of evidence-based studies.

05 Considerations in Making a Decision



Now vs. Later

While a project can become WELL Certified at any time, new construction or existing building, the advantages to beginning the certification process now are:

1. Fully integrated project team already assembled to help with documentation
2. Digital simulation tools can be used to inform decision-making and Feature selection
3. Funding available from MBC
1. Does this fit with our vision and values for the district?
2. Does this enhance our curriculum and give students a unique opportunity?
3. Does this open up partnerships within the community?
4. Does the rigor of certification offer an added benefit to designing for wellness?
5. Does it fit within our budget and workload?

06 Timeline of WELL Certification

The WELL Certification timeline revolves around the date of construction completion. Only after this date can the project team begin to submit documentation. In order for Performance Verification to be scheduled, the project must be one month from receiving the certificate of occupancy and operating at 50% occupancy minimum.

If construction for the Brookfield New Elementary School is set to be complete on May 31, 2023, don't we have a lot of time? Not really. The sooner the project team can engage IWBI, the better. Gathering the documentation will take some time, and for coordination purposes it would be easiest in Construction Documents while the whole consultant team is engaged.

The WELL Certification process can take up to one year after the date of construction completion before certification is awarded. In order to celebrate this achievement closer to the opening of the new school, it would be best to submit all the required documents as soon as construction is complete.

Using the timeline estimator online, and the May 31, 2023 date for construction completion, the estimated delivery of the Final WELL Report is December 27, 2023. After receiving the Final WELL Report, the project team has 180 days to accept the report and its WELL Certification level of Silver, Gold or Platinum. Below is an overview of the process:

1. Registration
2. Document Submission
 - a. Annotated Documents
 - Design documents
 - Construction documents
 - Operations schedules
 - Policy documents
 - Signage and communication materials
 - Professional narratives
 - Other (surveys, balancing reports...)
 - b. Letters of Assurance
 - Architect, Contractor, Engineer, Owner
 - c. General Documents
 - Signed WELL Certification Agreement
 - Scorecard
 - Representative floor plans
 - Mechanical drawings
 - Narrative describing project/Features
 - Proof of construction completion
3. Performance Verification
4. WELL Report issued by IWBI
5. Certification Awarded
6. Promote Your Story

07 Approximate Cost of WELL Certification

07.1 Single Cycle vs. Subscription

In the second generation of the WELL Building Standard (WELL v2), the pricing structure underwent a significant redesign. IWBI had been hearing that the first generation structure was cost prohibitive and inflexible. They responded by modifying their fee structure and introducing subscription options.

In WELL v2, projects have the option to pay upfront in the Single Cycle model, or enter into a 3-YR or 5-YR subscription. Each has benefits and drawbacks. The subscription model offers a lower up-front cost, distributed annual costs, and no recertification fee. The Single Cycle model comes with higher up-front costs but no annual costs. In this model, recertification incurs an additional expense.

As shown below, the subscription model has higher long-term costs. Weigh this expense against the value of having your dedicated WELL Coaching Contact remain active as long as your subscription is renewed - that is a distinct advantage of the subscription model. The subscription model also comes with a fee guarantee for the length of your subscription, no expiration for registration and no deadlines for document submission. The Single Cycle model is subject to annual price increases if documentation is not submitted within two years of registering, the expiration of registration if a project takes more than 5 years to complete Performance Verification, and annual price increases if documentation is not submitted within 2 years of registering.

If a project begins a subscription, it can be discontinued at any point and the Single Cycle model would apply.

Projects that select a 5-YR subscription model are still required to renew their WELL Certification every three years.

| | Single Cycle | Subscription |
|------------------------------|---|---|
| 07.2 Estimated upfront costs | ~\$32,500 initial costs | ~\$18,000 initial costs |
| 07.3 Estimated annual costs | Annual fee: \$0 Recert. fee: ~\$1,700** Perf. V: ~\$4,200 budgeted* | Annual fee: \$3,000 (5-yr model) Recert. fee: \$0 Perf. V: ~\$4,200 budgeted* |
| | ~\$5,900 annual costs | ~\$7,200 annual costs |

*Performance Verification estimated at ~\$12,500 / 3 YRS

**Single Cycle Recertification estimated at ~\$5,000 / 3 YRS

Schools are eligible for a 35% industry discount, which has been applied to the costs above.

BE WELL

“The wondrous diverse beauty of the natural world remains the source of who we are and can become as individuals and societies.” - STEPHEN R. KELLERT



Stay up to date with the latest and greatest
from WELL at wellcertified.com



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