# WELL v2<sup>TM</sup>

## Introduction

Dynamic. Resilient. Validated

WELL v2 has graduated

The WELL Building Standard<sup>TM</sup> version 2 (WELL v2<sup>TM</sup>) is a vehicle for buildings and organizations to deliver more thoughtful intentional spaces that enhance human health and well-being. WELL v2 includes a set of strategies—backed by the latest scientific research—that aim to advance human health through design interventions and operational protocols and policies and foster a culture of health and well-being. Built upon the pioneering foundation of the first version of the WELL Building Standard (WELL v1), WELL v2 draws expertise from a diverse community of WELL users, practitioners, public health professionals and building scientists around the world.

### HOW DID WE GET HERE?

The role buildings can play in human health and well-being has never been more evident or more important. Thanks to an evolving evidence base, we understand more about the relationship between the physical environment and human health than ever before. We know how to create spaces that enhance – rather than hinder – health and well-being. We can measure – and then improve – the quality of our air, water and light. We can design environments that fuel our bodies, move us, keep us connected, inspire our best work and facilitate a good night's sleep.

With WELL as our vehicle, IWBI helps to translate what we know into what we practice. We aspire to transform buildings and organizations in ways that advance health and well-being to help people thrive. This has been our mission since we launched WELL in 2014. And today, we know much more about how to achieve our goals. We've channeled all that we have learned into a more accessible, adaptable and equitable rating system, which continues to be anchored by the latest scientific research and industry best practices and serves as the foundation upon which the entire WELL ecosystem is built.

Since the launch of the WELL v2 pilot in 2018, we've worked tirelessly to incorporate feedback from thousands of members of our global community. During the two-year pilot phase, WELL v2 underwent improvement and refinement through a rigorous process, including a six-month public comment period and a final stakeholder review, garnering hundreds of market insights across the two phases. Throughout the pilot, we also published quarterly addenda to clarify and streamline implementation for projects around the world. In addition, the <u>IWBI Task Force on COVID-19</u>, comprised of 16 co-chairs and nearly 600 leaders and experts from 30 countries, collectively crowdsourced hundreds of comments during a 40-day sprint to assess how WELL v2 could be further strengthened to better support prevention and preparedness, resiliency and recovery.

The evolution of WELL v2 was supported by more than <u>150 WELL concept advisors</u>. Concept advisors have expertise in one or more of the ten WELL concepts and provide input on solutions to health and well-being concerns, best practices for localization,

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case studies to fill research gaps and innovative topic areas. Their expertise and input supported IWBI's Standard Development team, comprised of experts in each of the ten WELL concepts, at every turn, and helped take WELL to new heights.

In 2020, IWBI formed our <u>Governance Council</u> comprised of key global thought leaders, doctors, public health professionals and business executives. The IWBI Governance Council is tasked with a dual purpose to uphold the integrity of the WELL Building Standard development process and accelerate market transformation at a global scale. The first task of the Governance Council was to vote to confirm that WELL v2 met defined best practices for standard development and that each WELL feature met four tenets:

- 1. Evidence-based. Each WELL feature is underscored by available evidence that links design, policy and built environment strategies to health and well-being outcomes. Features are substantiated by a diverse and rigorous evidence-base, including peer-reviewed literature; academic research; and leading design standards, laws, codes and best practices.
- 2. Verifiable. All WELL features are third-party verified by GBCI through documentation and/or performance testing.
- 3. Implementable. All WELL v2 features haves been tested through WELL v1 and/or WELL v2 pilot demonstrating adoption and uptake by projects across the world.
- 4. Presented for outside input. At every step of the way, IWBI gathered feedback from a diverse community of practitioners, subject matter experts, users and other third parties to inform the development and evolution of WELL.

When put to the vote, in June 2020, the esteemed members of the IWBI Governance Council *unanimously* agreed that every single feature in WELL v2 meets the tenets outlined above. Following this rigorous review process leveraging internationally recognized standard development best practices, WELL v2 has demonstrated it is resilient, verified and dynamic.

### PRINCIPLES OF WELL V2

This latest version of WELL has proven itself to be a scalable and globally applicable feature set that's responsive, inclusive and adaptable to fit any environment or organization seeking to elevate human health and promote well-being for all.

WELL v2 is founded on the following principles:

Equitable: Aims to benefit a variety of people, including and especially disadvantaged or vulnerable populations.

**Global:** Proposes interventions that are feasible, achievable and relevant across many applications throughout the world.

**Evidence-based:** Draws upon a diverse and rigorous body of research across varying disciplines, validated by a collaborative body of experts, including IWBI advisors.

**Technically robust:** Defines industry best practice and validates strategies through performance verification and a rigorous third-party verification process.

**Customer-focused:** Sponsors the success of WELL users through dedicated coaching services, dynamic resources and an intuitive platform for navigating the journey.

**Resilient:** Keeps pace with advances in research, science, technology and society, continuously improving by integrating new findings.

### ARCHITECTURE OF THE RATING SYSTEM

WELL v2 consolidates previous iterations and pilots into a single rating system that is designed to accommodate all project types and sectors. The system is intended to grow in specificity and specialty over time, adapting to accommodate diverse project types and geographies and in response to new evidence and ever-evolving public health imperatives.

#### TEN CONCEPTS

There are ten concepts in WELL v2:



Each concept consists of features with distinct health intents. Features are either preconditions or optimizations.

#### UNIVERSAL PRECONDITIONS

Preconditions define the fundamental components of a WELL Certified space and serve as the foundation of a healthy building. WELL v2 offers a universal set of preconditions for all projects.

All preconditions – including all parts within them – are mandatory for certification.

#### FLEXIBLE OPTIMIZATIONS WITH MEANINGFUL WEIGHTINGS

Optimizations are optional pathways for projects to meet certification requirements in WELL. Project teams may select which optimizations to pursue and which parts to focus on within each optimization.

WELL v2 operates on a points-based system, with 110 points available in each project scorecard. All optimizations are weighted with varying point values. The maximum point value of a feature is determined by the sum of its parts. A part is weighted by its

potential for impact, defined as the extent to which a feature addresses a specific health and well-being concern or opportunity for health promotion, and the potential impact of the intervention.

Note: for some optimizations, achieving points in one part is contingent upon achieving points in another part.

#### DYNAMIC SCORECARD

The WELL digital platform guides project teams through the development of a unique scorecard. The digital platform recommends a selection of features based on project-specific parameters that can be further defined and refined by the project team.

### PERFORMANCE VERIFIED FEATURES

WELL is a performance-based system. Every WELL project is verified through on-site testing of building performance. This practice is fundamental to high-performing buildings and helps project teams better understand the relationship between the physical environment and human health.

The process for on-site assessments and testing is called Performance Verification. On-site measurements are taken for various air and water quality parameters, as well as sound and light levels. It is a distinct process from traditional building commissioning and assures that the building performs as intended, according to WELL requirements.

Performance Verification is completed by an authorized WELL Performance Testing Agent, who usually spend one to three days in the building to validate the project's documentation and complete a series of performance tests, spot-checks and measurements covering all WELL concepts. Testing is completed according to IWBI's sampling protocols available in the WELL Performance Verification Guidebook.

### PROJECT TYPES

WELL v2 projects fall into one of two main groups, determined primarily by ownership type:

- Owner-occupied: The project is mainly occupied by the project owner (which may be different than the building owner).
- WELL Core: The project owner occupies a small portion of the project area and rents/leases most of the space to one or more tenants.

#### **Owner-occupied Projects**

Owner-occupied projects are owned or leased by the project owner, and regular occupants (e.g., employees) are affiliated with the project owner. Owner-occupied projects are awarded WELL Certification at the Bronze, Silver, Gold or Platinum level (see Scoring and Certification Levels below).

Interiors represent a particular case of owner-occupied projects, where the project owner rents/leases space within a larger building (the "base building") that is less than half the size of the base building. Interiors projects operate like other owner-occupied projects, but in some cases, they can receive credit for amenities within the base building (see Project Boundary below). In other instances, interiors projects may be required to collaborate or work with the building owner or landlord to meet feature requirements that apply to building systems or spaces outside of the project owner's control, such as the HVAC system.

### **WELL Core Projects**

WELL Core is a distinct pathway for core and shell buildings (also known as base buildings) seeking to implement fundamental features to benefit tenants. In these projects, the majority of regular occupants are not affiliated with the project owner. Any building type can register for WELL Core, provided that at least 75% of the project area is occupied by one or more tenants and/or serves as common space in the building accessible to all tenants. Note that offices affiliated with the project owner but unrelated to the management of the project property may be considered a tenant, as long as additional tenants unaffiliated with the project owner occupy at least 60% of the net leased area. WELL Core projects are awarded WELL Core Certification at the Bronze, Silver, Gold or Platinum level (see Scoring and Certification Levels, below)

Mixed-use buildings where WELL Core is appropriate for at least 60% of the project area may register the entire building for WELL Core. Areas operated/occupied by the project owner are considered "non-leased space" (see Scope and Applicability below). Non-leased spaces include the common areas of the building and private spaces directly under the control of the building management team. Mixed-use buildings where WELL Core is appropriate for less than 60% of the project area should register one or more portions of the building as individual projects for WELL Certification or WELL Core Certification, as appropriate.

#### Feature Applicability and Scoring

Features have varying scopes of applicability for WELL Core projects, depending on the relevant population and project area. For example, some features, such as daylighting (L05) or bicycle storage (V04), must be met across the entire building. Other features apply only to spaces or personnel under the purview of the project owner, such as offering healthcare (C06) or childcare (C10) benefits.

Applicability designations are defined as follows:

- Building Management Staff: Individuals responsible for maintaining and operating the building, including contractors and sub-contractors. Workers who spend less than 30 hours per month in the building (i.e., who are not regular occupants) are not considered building management staff.
- **Direct Staff:** Building staff under direct employment by the project owner. Note: If a project has no direct staff on-site (i.e., the building is entirely operated by contracted building management staff), the project is allowed to earn points by meeting feature requirements for all or a defined subset of building management staff. Projects must use a single consistent population across all features, including preconditions (e.g., a project with no direct staff may only earn a point for meeting an optimization for its building management staff, if it also meets all preconditions for that same group of people).

- Extent of Developer Buildout: Includes all non-leased space and all construction within the leased space for which the project team is responsible.
- Leased Spaces: All areas within the project boundary that are leased to or owned by tenants, including areas for lease or for sale that are not currently occupied.
- Non-leased Spaces: All areas within the project boundary that are not considered leased space.
- **Project owner:** The legal entity that controls the property through ownership or as a leasee.
- Whole Building: Includes all areas within the project boundary. Some features indicate that projects can achieve a
  feature by providing a tenant budget. To use this pathway, project teams need to submit as part of documentation review,
  design assumptions and sample cut-sheets (as applicable) that justify the budget and can be used by the tenant during their
  design and construction process.

WELL Core projects have different point-values for parts and features than owner-occupied projects, based on the extent to which the requirements benefit all occupants within the project. Features that must be met for the whole building are generally worth more for WELL Core, while features with no or limited effect on tenants are generally reduced in value.

Some features allow WELL Core projects to earn additional points for applying the feature requirements in leased spaces (tenant areas) in addition to non-leased spaces. In addition, for projects where non-leased space makes up 40% or more of the project area, the additional point for some features (if indicated in the Core notes) may be earned without extending requirements to non-leased space. Projects are only eligible for one additional point per feature. Further guidance on applicability and additional point-earning potential for WELL Core is provided in the digital standard. To view this guidance, be sure to select the "WELL Core" view in the digital standard.

To earn additional points, WELL Core projects should first meet the baseline requirements of the feature established in WELL Core guidance. The exception is projects that do not include the baseline occupant population or relevant project area within their scope; these projects may pursue the additional points in their scorecard without meeting the baseline feature requirement first.

### Performance Testing Scope

For WELL Core projects, at least 2.5% of the total building floor area must be available for performance testing for certain preconditions. The available testing area must include all common areas and spaces directly under the control of the building management team. If common areas and spaces under owner control comprise less than 2.5% of the total building floor area, the project must supplement with tenant spaces to reach this threshold. Testing in leased spaces in these cases can take place before or after tenant occupancy.

Some performance-based optimizations explicitly state that they require testing in tenant spaces to be awarded. The project is responsible for identifying and communicating to Green Business Certification, Inc. (GBCI) and the WELL Performance Testing Agent the particular spaces which are available for testing.

### **Multifamily Residential Projects**

Multifamily residential projects may pursue WELL if they contain at least five dwelling units in a single building with common structural elements. Projects that qualify include apartments, condominiums, townhouses and other residential complexes within all market thresholds – affordable housing, market-rate and luxury.

Multifamily residential projects utilize the WELL Certification pathways (i.e., not WELL Core), even though most of the regular occupants are tenants, and the project owner may not complete the fit-out of the dwelling units. Any items installed by residents are not within scope of feature requirements, but do note that these items could impact performance testing results for other features.

Performance testing within dwelling units for precondition features is not required for multifamily residential projects seeking certification at the Bronze or Silver level. However, projects cannot achieve Gold or Platinum without testing conditions in a sample of dwelling units. See Features A01, W01, W02, L02 and T01 and the Sampling Rates for Multifamily Residential section of the WELL Performance Verification Guidebook for more details. For optimizations, testing within dwelling units is required, whether or not the project is targeting Gold or Platinum.

At recertification, for all levels of certification, testing is not required within dwelling units -- only in common areas and spaces dedicated to building management.

### SCORING AND AWARDS

### WELL CERTIFICATION

Certification represents the highest pinnacle of health achievement across all 10 concepts. Projects must achieve all preconditions, as well as a certain number of points towards different levels of WELL Certification:

Total points achieved	WELL Certification		WELL Core Certification	
	Minimum points per concept	Level of certification	Minimum points per concept	Level of certification
40 pts	0	WELL Bronze	0	WELL Core Bronze
50 pts	1	WELL Silver	0	WELL Core Silver

60 pts	2	WELL Gold	0	WELL Core Gold
80 pts	3	WELL Platinum	0	WELL Core Platinum

Projects may earn no more than 12 points per concept and no more than 100 points total across the ten concepts.

Projects can also pursue an additional ten points in the Innovation concept. If a project earns more than 12 points in any concept, the additional points are counted toward Feature I01, provided the maximum points in the Innovation concept have not yet been reached.

#### **PRECERTIFICATION**

WELL Precertification allows project owners to demonstrate a commitment to health and well-being, market the proposed features of a project to potential tenants looking to occupy the space and determine which features the project is likely to achieve during the full WELL Certification review. Unlike WELL Certification – which applies to a completed project – projects still under construction may achieve precertification, using documentation based on current plans rather than as-built conditions. In addition, performance testing results are not applicable/required during precertification.

WELL Precertification requires achievement of all preconditions as well as 40 points in optimizations. Above this minimum, the precertification designation does not further differentiate how many points are successfully reviewed (e.g., there is no "Precertified Gold").

#### WELL SCORE

Organizations that subscribe their entire organization (or legal entity) are eligible to receive a WELL Score, a metric that reflects the health and well-being achievements of the entire organization. The WELL Score is a whole number ranging from 0 to 100, which is calculated as the average number of points achieved by the project locations within the organization, weighted by the number of occupants in each location.

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

### APPLYING WELL FEATURES

To accurately define the project scope and determine which features apply or may be appropriate for a project, it is important to understand how WELL features apply to different spaces and populations within a building.

#### PROJECT BOUNDARY

Defining the boundary of the project pursuing WELL certification, or the borders of the project brings further specificity to the project's scope. The project boundary must be consistently applied across all features. The project boundary may not unreasonably exclude portions of the building, space or site to give the project an advantage in complying with feature requirements. The project must accurately communicate the scope of the project in all promotional and descriptive materials and distinguish it from any space that falls outside of the project boundary. The project pursuing WELL certification should be defined by a clear boundary, such that the project is physically distinct from any portion of spaces not part of the project pursuing WELL certification.

The project boundary can include both interior and exterior spaces. Note that if the project boundary includes exterior (outdoor) spaces, this area is not counted when determining the project's area at registration (including for pricing purposes). For more guidance on how to calculate project size, download the WELL Certification Guidebook.

WELL features (unless otherwise noted in feature language) must be met within the project boundary, including (if applicable) exterior space. One of the pathways in Feature M09 Part 2 requires that projects provide an occupant-accessible outdoor space. For this space to count, it must be within the project boundary and, therefore, within the scope of other features that affect outdoor areas, such as pest management and pesticide use in Feature X10 (if pursued) and illuminance levels on pathways for Feature L02.

#### **Project Boundary Allowances**

Some features explicitly enable a space within a certain distance of the project boundary to be used towards feature requirements. Feature language specifies the distance allowed for each strategy. For example, Feature N08 requires a designated eating space within a 200 m [650 ft] walk distance of the project boundary. In these cases, the distance is measured along a pedestrian-accessible path from a functional building entrance (elevation change should not be considered in its calculation). If located outside of the project boundary, the space is not subject to the requirements of other features pursued by the project. These spaces may also be provided within the project boundary, in which case they are subject to other WELL requirements.

Certain features include a certification note for interiors projects that enable them to claim credit for amenities provided by their base building outside the project boundary. For example, an interior fit-out project may use the stairs which connect the entrance to the ground floor (if occupant-accessible) toward Feature V03. If a feature prescribes a certain quantity of amenities (such as the number of long-term bicycle parking spaces in Feature V04), an interiors project may take credit for the base building meeting this feature as long as these amenities are either reserved for the WELL project or sized for all occupants in the building.

#### **SPACE TYPES**

All parts of WELL v2 are designated for specific space types. Space types refer to spaces within a project and not the project as a whole. For example, a school might be made up of space types like classrooms, offices, a commercial kitchen and dining areas. Identifying space types within a project can help clarify how WELL features apply to that particular project.

Many parts in WELL features are denoted "For All spaces," an indication the part must be applied to all spaces within the project boundary, for all project types. Depending on the part, there may be distinct requirements for specific space types. These requirements are either required in addition to the requirements for all spaces or used in place of the requirements listed for all other spaces. For example, Feature N01 Part 1 has separate requirements for dining spaces and all other spaces, as indicated in the tab, "For All Spaces except Dining Spaces." Conversely, Feature N01 Part 2 has one set of requirements "For All Spaces" (including Dining Spaces) and additional requirements "For Dining Spaces" only.

### **Space Type Occupancy**

In addition to the classification of space types within a project, WELL v2 also distinguishes spaces based on their level of occupancy:

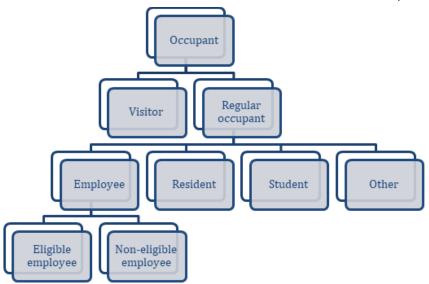
- **Regularly occupied space:** areas inside the project where a particular individual normally spends at least one continuous hour or, cumulatively, at least two hours per day, such as offices, conference rooms, bedrooms and classrooms.
- Occupiable space: spaces that can be occupied for any task or activity, including transition areas or balconies, but excluding spaces that are rarely accessed, such as storage spaces or equipment rooms.

Rooms larger than 930 m<sup>2</sup> [10,000 ft<sup>2</sup>] may be divided into separate zones (at least 325 m<sup>2</sup> [3,500 ft<sup>2</sup>] each), which may be evaluated for occupancy independently. For example, a large room may have one or more small areas (i.e., zones) within it, which are regularly occupied, while the remaining space is not. In this case, the project may identify and label these zones within their floor plan and apply features and performance testing requirements accordingly.

### **OCCUPANT TYPES**

Determining or anticipating who will be present in each phase of a project helps create a complete picture of where and for whom the requirements of WELL features apply. WELL uses specific terminology to refer to groups of individuals that share characteristics. Project teams must employ a single, consistent definition of these terms across relevant features:

- Occupant: any individual within the project boundary.
- **Regular occupant:** an individual who spends at least 30 hours per month across at least five days within the project boundary (e.g., employee, resident, student).
- Visitor: any occupant who is not a regular occupant (e.g., shopper, museum-goer, hotel guest).
- Employee: an individual who works for the project owner within the project boundary.
- Eligible employee: an employee identified as qualifying for benefits. At a minimum, this includes all full-time employees but may also include part-time employees, interns, contracted workers and other non-full-time employees as appropriate.



For features that require size or quantity calculations to be performed based on a class of occupants listed in feature language, use the maximum number of occupants of that class to be expected at any given time.

#### **CALCULATIONS**

When making calculations for WELL features, do not apply rounding. Instead, use the most expansive interpretation of the result. For example, Feature V02 Part 1 requires adjustable height workstations for "at least 25% of all workstations." In a project with 21 workstations, the required number of workstations would be six, since five desks would only reach 23.8%.

### MINIMUM SCOPE OF WELL FEATURES

Certain features require that a minimum scope is met – that is, the minimum level of achievement necessary to achieve a feature related to people, spaces and/or products.

#### **NEWLY INSTALLED PRODUCTS**

Some features, particularly in the Materials concept, require that products (such as cleaning products) with specific characteristics or qualities be used or installed in the project. More specifically, the requirements of some features apply to newly installed products -- that is, products installed after project registration.

Preconditions have no minimum scope, and a project without any relevant newly installed materials/products is considered in compliance. For example, Feature X01 restricts mercury in specific categories of newly installed lamps and electronics. If a project installs no lamps or electronics, they are considered in compliance with feature requirements.

For projects to qualify for optimizations that apply to newly installed products or materials, the quantity of products or materials which must comply with feature requirements is specified in the feature language. For example, Feature X05 requires that at least half of newly installed furniture, millwork and fixtures meet the enhanced material restrictions, and there must be at least 10 distinct products within the scope to qualify.

#### FOODS AND BEVERAGES

A particular category of products pertains to foods and beverages. Projects that do not sell or provide food daily by (or under contract with) the project owner, including catering, are considered in compliance with the Nourishment preconditions. A daily basis is defined as the majority of days in the project's operating week. This is assessed during each week of seasonal operation for projects that do not sell or provide food year-round.

Foods and beverages supplied by the project owner (or by a vendor under contract with the project owner) include but are not limited to items sold or provided in restaurants, cafeterias, cafes, vending machines and items available in kitchen pantry areas. They do not include anything brought into the project by occupants for personal consumption.

Features that apply to commercial dining spaces require on-site food preparation and/or full-service dining. These projects typically include a commercial kitchen and food service staff. Foods prepared on-site include foods assembled on-site and foods prepared for immediate consumption. Projects without these facilities are not eligible to pursue these features.

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#### About the WELL Building Standard (WELL<sup>TM</sup>)

Launched in October 2014 after six years of research and development, WELL is the premier Standard for buildings, interior spaces and communities seeking to implement, validate and measure interventions that support and advance human health and wellness.

WELL was developed by integrating scientific and medical research and literature on environmental health, behavioral factors, health outcomes and graphic risk factors that affect human health with leading practices in design, operations and management. WELL also references existing standards est practice guidelines set by governmental and professional organizations.

#### About the International WELL Building Institute<sup>TM</sup> (IWBI<sup>TM</sup>)

The International WELL Building Institute (IWBI) is leading the global movement to transform our buildings, organizations and communities in ways that help people thrive. IWBI delivers the cutting-edge WELL Building Standard, the first standard to be focused exclusively on the ways that buildings, and everything in them, can improve our comfort, drive better choices, and generally enhance, not compromise, our health and wellness.

IWBI's work extends to advancing health through design for entire neighborhoods through the WELL Community Standard, and convening and mobilizing the wellness community through management of the WELL AP credential.

WELL Certification and the WELL AP credentialing program are third-party administered through IWBI's collaboration with Green Business Certification Inc. (GBCI), which also administers LEED certification, the global green building program, and the LEED professional credentialing program.