



# *The WELL Health-Safety Rating & What You Need to Know*

*April 13, 2021*



**ILLINOIS GREEN**

A USGBC COMMUNITY

# International WELL Building Institute 'WELL Seal' 30" TV Commercial



# TODAY'S SPEAKERS

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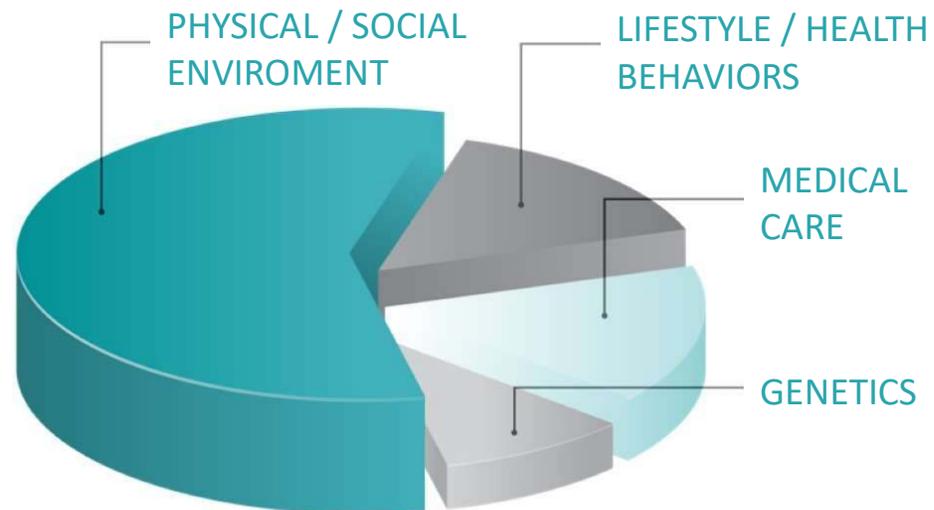


**Tim Zelazny**  
ESD  
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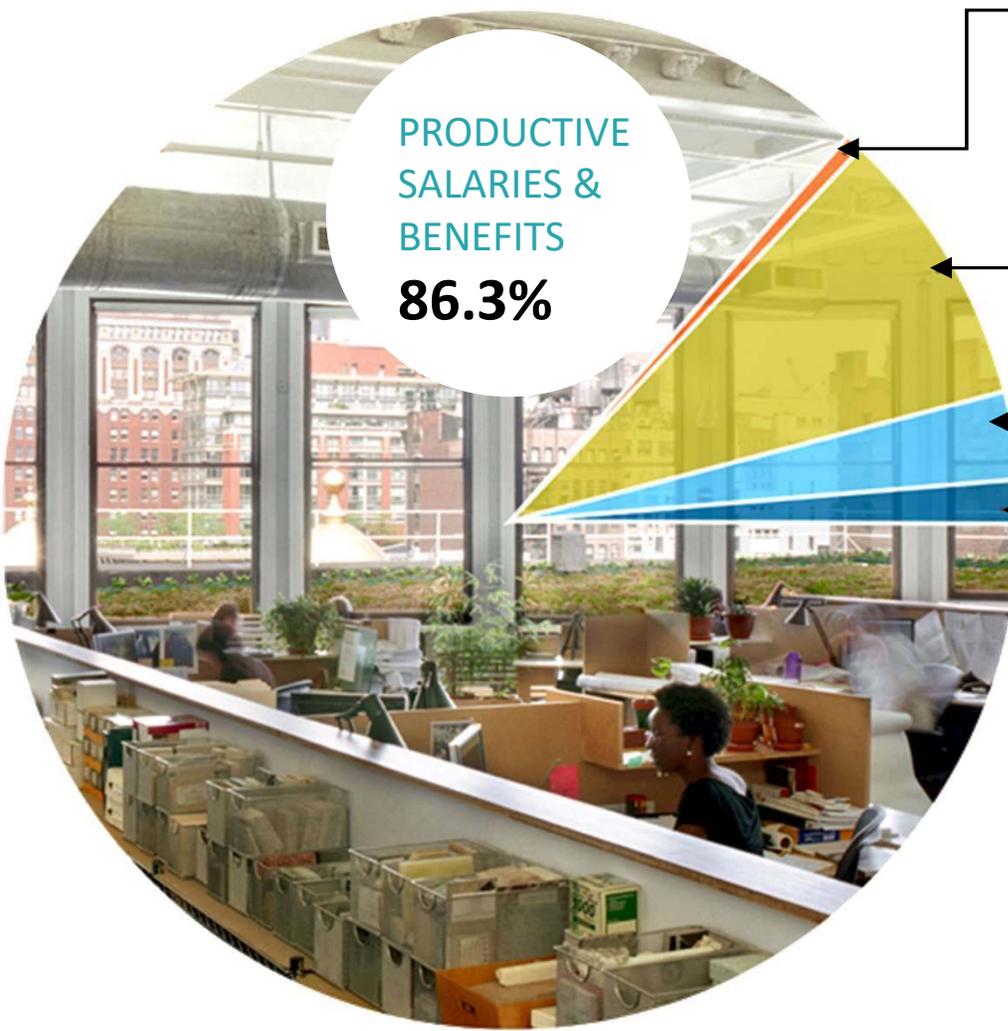


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WHAT FACTORS  
**INFLUENCE**  
HEALTH &  
WELL-BEING?



Centers for Disease Control and Prevention, NCHHSTP Social Determinants of Health: Frequently Asked Questions. 2014;  
<https://www.cdc.gov/nchhstp/socialdeterminants/faq/html>. Graphic: IWBI



**PRODUCTIVE  
SALARIES &  
BENEFITS  
86.3%**

**ENERGY  
0.8%**

**RENT  
8.9%**

**ABSENTEEISM  
2.7%**

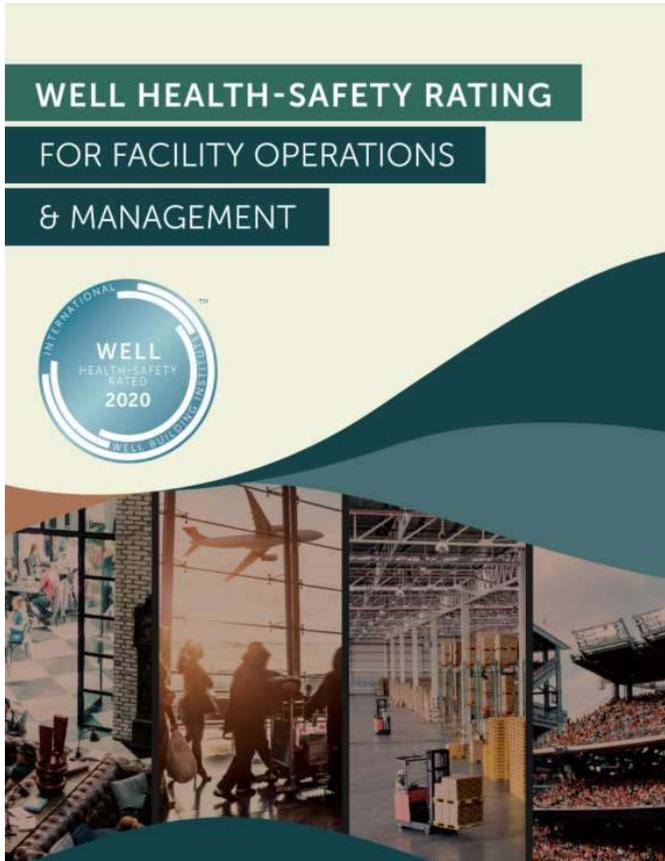
**PRESENTEEISM  
1.3%**

**UNPRODUCTIVE  
SALARY AND  
BENEFITS**









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15 Features must be earned to achieve certification

## 17. Develop Legionella Management Plan

### *Intent*

Implement protocols to reduce risk of *Legionella* colonization.

### *Feature Background*

Summary: This feature requires projects to manage recirculating hot water systems against Legionella colonization.

Issue: All water systems require some degree of validation to ensure that health targets are met under the operational conditions, for which sampling is an effective verification tool.<sup>227</sup> Legionella bacteria is naturally present in waters at low concentrations, but it may colonize recirculated water systems and can cause lung disease and even death if contaminated water aerosols are inhaled.<sup>228</sup> Legionnaire's disease affects especially the immunocompromised, smokers and those over age 50.<sup>228</sup> Assets commonly vulnerable to Legionella infestation include domestic potable and hot water systems, cooling towers, humidifiers, misters, decorative fountains, spas and hot tubs.<sup>228</sup>

Solutions: Minimizing the risk of Legionella requires a thorough and quantitative risk assessment of buildings' water assets, identifying locations where control is required, and a well-documented maintenance and operations program.<sup>213</sup> Implementing a proper Legionella management plan should reduce the risk of exposure to pathogenic bacteria.

### *Requirements*

#### *Develop Legionella Plan*

The project provides a Legionella management plan that meets the following requirements:

- a. Addresses hot water systems, cooling towers, decorative fountains and any other devices or spaces under control of the project where water is recirculated and aerosolized.
- b. Includes the items listed below:
  1. Determination of roles for Legionella management in the building, distinguishing those under project control from those that may be the responsibility of building management or other parties.
  2. Water system inventory and process flow diagrams of systems within the project boundary.
  3. Hazard analysis of water assets within the project boundary. If the project does not operate the building hot water supply system (e.g., boilers, heaters, pumps or hot water risers), then an explanation of the building-wide Legionella management policies (if any) and how they influence risk is included.
  4. A list of monitoring actions for relevant variables (e.g., temperature or residual chlorine), performance limits associated with these variables and corrective actions when variables exceed such limits.
  5. A list of critical control points (locations where actions to maintain relevant variables listed in (4) within performance limits are applied) within the project boundary.
  6. Verification and validation procedures for evaluating the suitability and proper implementation of the management plan. A Legionella sampling schedule is included if projects have operational control over cooling towers and spas.
  7. Protocols for documenting results of monitoring activities and corrective actions. If sampling for Legionella is planned, results are included.

*Verification type: Technical Document - Legionella management plan*

#### *Implement Legionella Plan*

The following requirement is met:

- a. Documentation of monitoring results, corrective actions and Legionella sample results as stated in the Legionella management plan are submitted annually through the WELL digital platform.

*Verification type: On-going Maintenance Report*



- 15 features must be earned for certification
- No prerequisite/mandatory features
- Geared towards Covid response, but applicable to a variety of potential business/operational disruptions
- Good for 1 year + annual renewal
- Any type of facility may pursue HSR (except single family homes)
- Whole building, core+shell, tenant fit-out or portfolio
- Scalable pricing (most have \$4,200 fee)
- Can be documented internally, although some engineering expertise may be required for assessment/documentation
- Operations/HR engagement is essential



Small business	Standard	High-volume, multi-use	Bulk pricing
<b>\$2,730</b> USD	<b>\$4,200</b> USD	<b>\$12,600</b> USD	<b>*\$400</b> USD
Small businesses with less than 50 employees and less than \$10 million in revenue.	Individual spaces/buildings not yet registered to pursue WELL Certification or subscribed in the WELL Portfolio program.  <i>Bulk pricing is available for locations having a single owner and applying streamlined documentation.</i>	High-volume locations are designed to accommodate more than 10,000 people daily and provide four or more distinct uses, such as retail, dining, entertainment, residential, lodging, offices, etc.  <i>Examples: stadiums, large hotel complexes, airports and shopping centers.</i>	Multiple locations with a single owner and payer qualify for pricing efficiencies. This pathway requires that all locations apply streamlined and consolidated documentation and undergo review together. <i>*starting at</i>
<a href="#">Enroll now</a>	<a href="#">Enroll now</a>	<a href="#">Enroll now</a>	<a href="#">Enroll now</a>



EDUCATION & RESOURCES

## Here's what you need right now



### WELL Health-Safety Rating Guidebook

A step-by-step guide to implementing and achieving the WELL Health-Safety Rating.

HEALTH-SAFETY



### WELL Health-Safety Rating: At a Glance

An at-a-glance look at the WELL Health-Safety Rating.

HEALTH-SAFETY



### WELL Health-Safety Rating Presentation

A slide deck highlighting details of the rating.

HEALTH-SAFETY



<https://www.wellcertified.com/health-safety/>



esdglobal.com

## ESD's Experience

# WELL Health- Safety Rating

### ESD Energy+Eco Sustainability Impact—A 14 Year Recap

230 LEED Projects

43 million square feet of LEED certified space

2 WELL Interior Projects

2 WELL Core & Shell Projects

20 WELL Health-Safety Projects

2 Fitwel Interior Projects

2 RESET Feasibility Studies

Captured nation's first WELL v1 Gold C&S High-rise. Participant in first WELL AP provisional class. Contributor to the LEED v4 Reference Guide (Fundamental Cx) and LEED AP exam development.

Chicago's First WELL Health-Safety Rated Office Building & Nation's First WELL Core Platinum Building

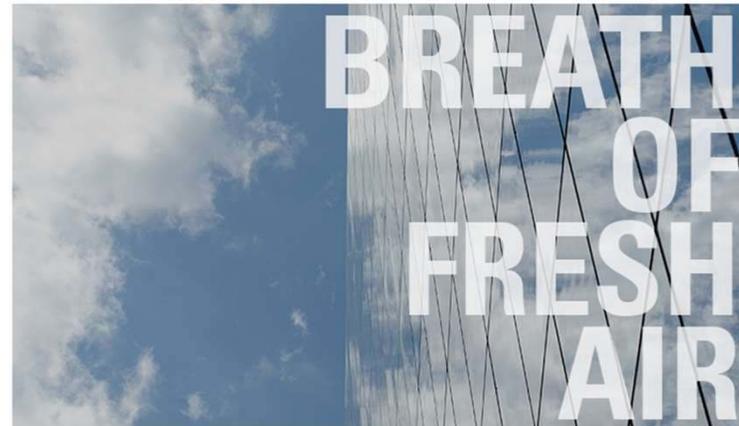
# Timeline - ESD



- ✓ Efficient at removing particulates
- ⬇ Somewhat efficient at removing particulates

	MERV 8	MERV 11	MERV 13	MERV 14+
PM 10 (Dust, Pollen Wildfires)	✓	✓	✓	✓
PM 2.5 (Cars, Airplanes, Construction)	⬇	✓	✓	✓
VOCs (Pesticides, Cleaners, Office Equipment)	✗	✓	✓	✓
Ozone (Sunlight Reacting with Emissions)	✗	⬇	✓	✓
Carbon Oxides (Fossil Fuel Combustion)	✗	⬇	✓	✓
Nitrogen Oxides (Fossil Fuel Combustion)	✗	⬇	✓	✓
Sulfur Oxides (Fossil Fuel Combustion)	✗	⬇	✓	✓
Bacteria	⬇	✓	✓	✓
Mold Spores	⬇	✓	✓	✓
Viruses	✗	✗	✗	✓
Odors	✗	✗	✗	✗

## Minimize the Risk of Virus Transmission Through HVAC Systems



**LEED & WELL HSR**

There is no direct overlap between LEED and WELL Health-Safety Rating.

**WELL vs. Fitwel vs. RESET**

**WELL Building Standard**, different from WELL HSR, certifies a space based on the measured quality of the air, water, acoustics and lighting. It also has a large focus on access to quality fitness and nutrition.

**Fitwel** promotes a healthy and active lifestyle and awards points largely based on proximity to walkable amenities.

**RESET** is focused on continuous monitoring of indoor air quality.

What is a MERV rating? (2019, August 1). Retrieved from <https://www.epa.gov/indoor-air-quality-iaq/what-merv-rating-1>  
ASHRAE Std. 52.2 TABLE E-1. (n.d.). Minimum Efficiency Reporting Value (MERV).



## Value of WELL Health Safety Rating

1. Tool to engage with base building and tenants regarding COVID-19 strategies
2. 3<sup>rd</sup> party approval of plans (CDC, ASHRAE) already in place
3. Science based recommendations above CDC and ASHRAE
4. Proof of continuous implementation (i.e. plans) and maintenance (ex. filter replacement)
5. Window decal that quickly communicates your efforts





# WELL Health Safety Summary

## One Location

### Summary

- Release Date: June 2020
- Requirement: 15 of 25 Points
- Cost: ~\$15k - \$25k
- Timeline: 3-4 Months
- Recertification: Every Year

### Level of Effort

- 2-3 meetings to focus on edits needed to current cleaning and emergency management plans
- 1-2 meetings to assess HVAC
- Annual record of maintenance and training for submission to GBCI

### KEY THEMES

- Cleaning and Sanitation Procedures
- Emergency Preparedness Programs
- Health Service Resources
- Air and Water Quality Management
- Stakeholder Engagement and Communication





# WELL Health Safety Cost Summary

## One Location

- GBCI Review Fee
  - \$4,200 (\$2,730 for non-profits)
- Documentation Fee
  - \$0 if done internally
  - ~\$11k+ for all documentation by consultant
- GBCI Annual Recertification Fee
  - \$4,200 (\$2,730 for non-profits)

## Portfolio

- GBCI Review Fee
  - See below
- Documentation Fee
  - \$0 if done internally
  - \$TBD if done by a consultant, depends on number of locations
- GBCI Annual Recertification Fee
  - See table below

Number of spaces / buildings	Price per space / building	Minimum price
2-10	\$1,000	\$5,000
11-50	\$875	\$11,000
51-100	\$750	\$44,625



## Next Steps

- Review the [cost](#)
- Review the [requirements](#) and perform an internal feasibility study to see how many points are feasible
- Reach out to an engineer to provide a HVAC assessment
- Utilize the sample documentation after registering the project

The screenshot displays the user interface of the WELL Health-Safety app. At the top left, there is a back arrow and the text "Back to my account". Below this, the app title "WELL Health-Safety" is shown. The main navigation menu on the left is divided into three sections: "ACHIEVE" (Dashboard, Checklist, Documents, Reviews), "ENGAGE" (Promotion, Profile, Alternatives), and "MANAGE" (Support, Locations, Team, Billing). The "Documents" menu item is highlighted with a red box. The main content area on the right is titled "WELL HEALTH-SAFETY / SUPPORT" and "Sample Documents". It lists 20 sample documents, including "Support Handwashing", "Reduce Surface Contact", "Improve Cleaning Practices", "Select Preferred Cleaning Products", "Develop Emergency Preparedness Plan", "Create Business Continuity Plan", "Plan for Healthy Re-Entry", "Provide Emergency Resources", "Bolster Emergency Resilience", "Provide Sick Leave", "Provide Health Benefits", "Support Mental Health Recovery", "Promote Flu Vaccines", "Promote a Smoke-Free Environment", "Assess Ventilation", "Assess and Maintain Air Treatment Systems", "Develop Legionella Management Plan", "Develop Legionella Management Plan Best Practices", "Monitor Air and Water Quality", "Manage Mold and Moisture", and "Promote Health and Wellness".

# Lead with transparency

The WELL Health-Safety seal is a visible indication that a building's health and safety efforts are backed by science and validated by a third-party.



**Brookfield**  
Properties

**Brookfield**  
**Properties**

**WELL Health-Safety**  
**Rating**



# Brookfield Asset Management



## Real Estate

**\$203B**

- Office
- Multifamily
- Retail
- Logistics
- Hospitality
- Mixed-Use
- Residential
- Alternative Real Estate



## Infrastructure

**\$78B**

- Utilities
- Transport
- Energy
- Data Infrastructure
- Sustainable Resources



## Renewable Power

**\$52B**

- Hydroelectric
- Wind
- Solar
- Storage



## Private Equity

**\$65B**

- Business Services
- Infrastructure Services
- Real Estate Services
- Industrials



## Credit

**\$132B**

- Performing Credit
- Opportunistic Credit
- Private and Listed Equities
- Real Estate

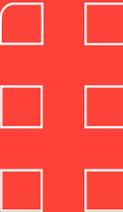
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Real estate,  
reimagined.

A better company for our  
people and partners.

Better communities for our  
neighbors.

A better world  
for us all.



## Our managed portfolio

**325M+**

Square Feet  
Commercial Space

**~20,000**

Multifamily Units

**150M+**

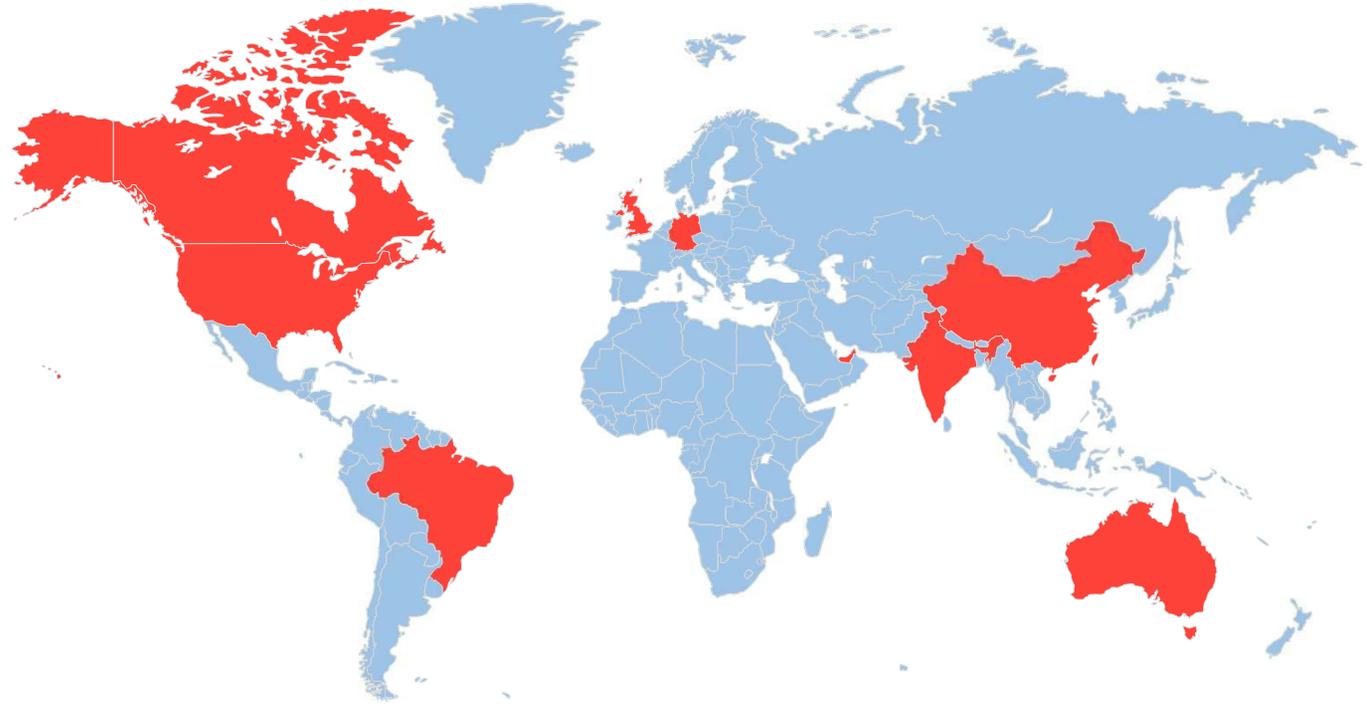
Square Feet of Retail

**140M+**

Square Feet of Office

**150+**

Logistics Warehouses



# Brookfield Properties



innovation

# Retail

- 
- 
- 



## Benefits – Portfolio Approach

### 01 Transferable

- Utilize existing policies and procedures

### 02 Scalable

- Easy to scale across portfolio(s)
- Submit evidence across assets

### 03 Flexible

- Multiple property types
- Do not need to achieve all features
- Innovation features

# Brookfield Properties

## Emergency Preparedness Plan

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### Addenda to the Tenant Emergency Procedure Manual

#### RISK ASSESSMENT

##### A. Primary Assets

All the properties have following primary assets:

- Direct employees
- The building itself
- Project exterior site, including parking area
- Occupants (tenants, customers, third-party vendors etc.)

##### B. The following hazards were assessed across the assets listed above:

- Natural (Tornado watches, Tornado Warnings, Earthquakes, Hurricanes)
- Fire
- Technological
- Human Caused – Active Shooter, Bomb Threat, Civil unrest

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## Considerations – Portfolio Approach

### 01 Cost

- Some higher-cost measures (e.g. air quality testing), especially when considering scale

### 02 High-Effort Features

- Extensive criteria for some features

### 03 Review

- Lack of consistency

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