

## A Guide to Assessing your Portfolio Using Fitwel

To optimize buildings and communities to promote the health, safety, and wellbeing of your occupants, the first step is to measure where your portfolio stands today.

The Platform provides insights into how a single asset or an entire portfolio is impacting occupant health. By linking operation and design strategies to health impact categories through a robust evidence base, the Platform can calculate how various strategies will impact mental, social, and physical health outcomes.

Benchmarking allows real estate owners and investors to quickly:

Assess buildings and communities against the Fitwel Standard

Measure the current impact of each property's design and operations on occupant health

Assess the performance of a portfolio and each building as it relates to specific health metrics

Generate an actionable plan for future investment and decisions that will impact occupant health and experience

There is strong demand for healthy buildings globally. A survey of real estate investors conducted by the Center for Active Design, BentallGreenOak, and the United Nations Environment Programme Finance Initiative found that 9 out of 10 respondents plan to enhance their company's health and wellbeing strategies. Benchmarking provides an actionable first step to accessing evidence-based strategies companies can adopt that improve the value of their portfolio, further occupant health, and enhance the occupant experience. Benchmarking transforms the information about a portfolio into a pathway that owners and investors can act on to plan future investments.

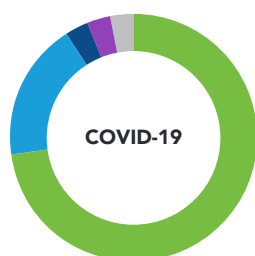
Healthy buildings have an effective rent of

**4.4-7.7%**

more per square foot than their non-certified peers – and that was even before the pandemic.

## Motivations Driving Rising Demand

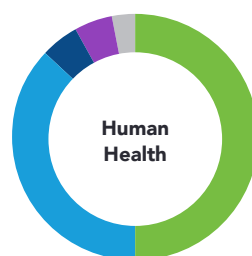
Ignoring health is now widely recognized for what it has always been: *a risk*.



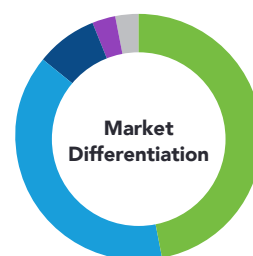
73% High Motivation  
18% Medium Motivation  
3% Low Motivation  
3% No Motivation  
3% N/A



63% High Motivation  
28% Medium Motivation  
3% Low Motivation  
3% No Motivation  
3% N/A



50% High Motivation  
37% Medium Motivation  
5% Low Motivation  
5% No Motivation  
3% N/A



47% High Motivation  
39% Medium Motivation  
8% Low Motivation  
3% No Motivation  
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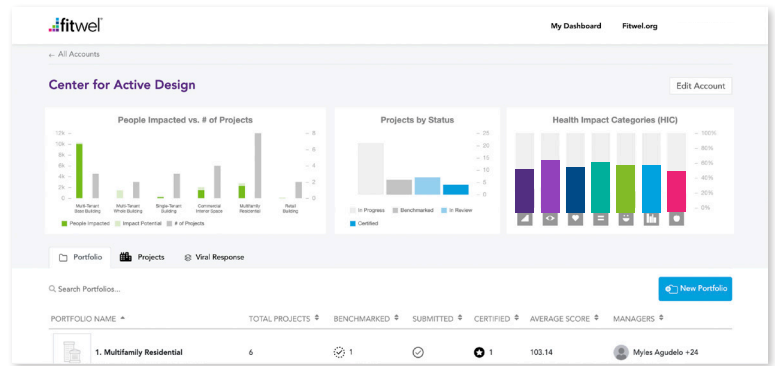


47% High Motivation  
36% Medium Motivation  
11% Low Motivation  
3% No Motivation  
3% N/A

# The Platform

The Platform is an intuitive, data-driven project management tool that enables owners and investors to quickly benchmark their portfolios in a secure, online environment. Benchmarking can be completed for any mix of asset types and operators.

**Benchmarking does not require properties to achieve Fitwel certification.** Rather, it helps owners and investors assess their portfolio's key performance metrics and to identify properties that are primed to achieve Fitwel certification while also supporting investments to optimize properties for future certification opportunities.



## Benchmark Today, Invest in Health for the Future

Once you've benchmarked your portfolio in the Platform, you'll have the information you need to:

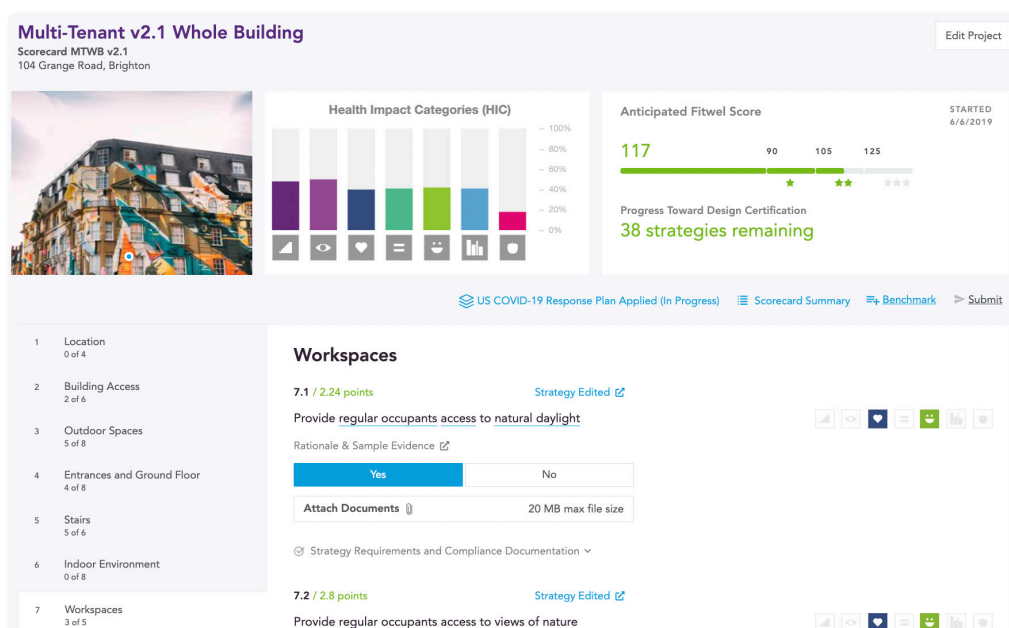
**Share and report performance:** By using Platform reports, owners and investors can generate performance documents for each property and share insights from both the asset and portfolio levels with team members.

**Identify underperforming buildings to target for efficiency improvements:** Owners and investors can generate gap analysis reports via the Platform to help identify ways to further optimize assets that are underperforming in terms of impact on occupant health.

**Set priorities:** The tools and metrics available in the Platform enable owners and investors to set priorities to determine how to allocate capital, maximize impact, and improve occupant experience.

**Implement portfolio-wide solutions and programs:** By using the portfolio-wide solutions found across the Platform, owners and investors can streamline adoption of Fitwel's health-promoting design and operation strategies to optimize a portfolio's impact on occupant health – while minimizing the work of property-level team members.

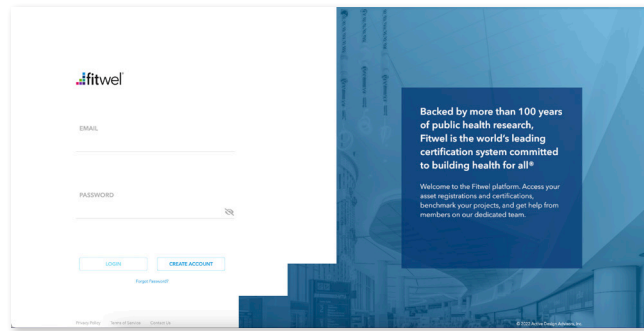
**Verify top-performing properties through the Fitwel certification process:** Properties that score at least 90 points during benchmarking can submit for Fitwel certification to validate the benchmarking results. Fitwel certification demonstrates to stakeholders – whether they are residents, tenants, investors, or employees – a quantifiable method to promote occupant health and improve the value of a building, through a rigorous third-party assessment.



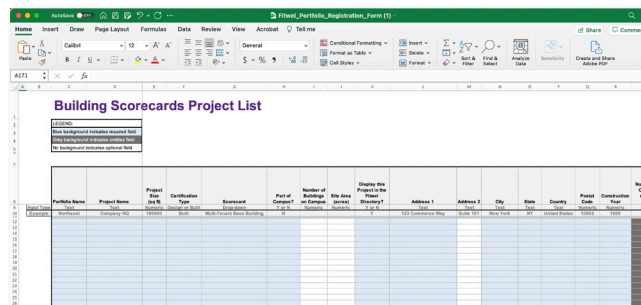
Visit [www.fitwel.org](https://www.fitwel.org) for more information.

# How to Get Started

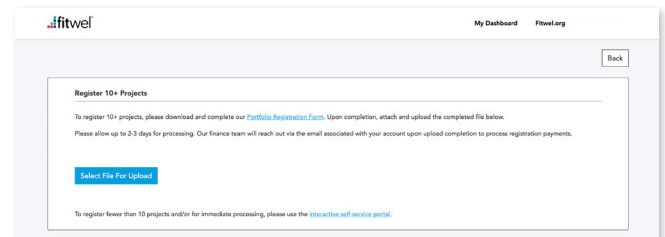
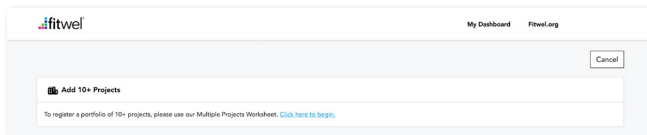
1. Create an account on the Platform by visiting [app.fitwel.org](https://app.fitwel.org).



2. Use the Portfolio Registration Form to collect the property-specific data necessary to register on the Platform.

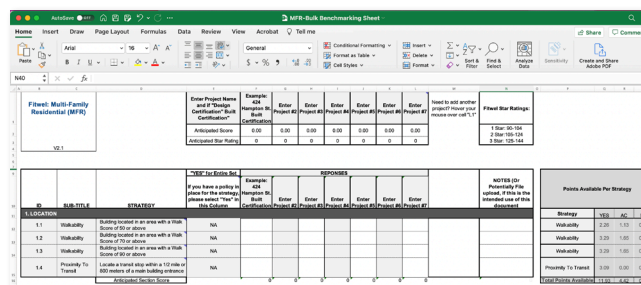


3. Upload the Portfolio Registration Form to the Platform or send it to your Relationship Manager.\*



4. Next, use the Fitwel Benchmarking worksheet to assess your portfolio against the Fitwel Standard by responding Yes or No to individual strategies and accessing key performance metrics.

**Reach out to Josh Kloewer at [josh@centerforactivedesign.org](mailto:josh@centerforactivedesign.org) to get started.**



5. Finally, the Fitwel Team will upload the Fitwel Benchmarking worksheet to the Platform.

Upon completing the above steps, schedule a call with a member of the Fitwel team to review the benchmarked portfolio, assess performance, walk your colleagues through the Platform, and determine next steps.



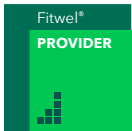
## Pricing

Benchmarking is a cost-effective and efficient process to better understand your portfolio and access key information about its performance and impact. Benchmarking starts at just \$500 per building or site, and payment is due upon registration. Contact us at [info@fitwel.org](mailto:info@fitwel.org) for more information.

## Additional Benchmarking Support



For companies benchmarking more than 20 assets, Fitwel's signature program – the **Fitwel Champion** program – is designed to offer companies optimal support and guidance as they adopt Fitwel at scale through benchmarking and certification of buildings and communities. More information can be found at [fitwel.org/champions](https://fitwel.org/champions).



For companies supporting owners' and managers' use of Fitwel, the **Fitwel Provider** program offers dedicated trainings and assistance for staff members and exclusive marketing and recognition opportunities for staff and the company. The Fitwel Provider program has been designed specifically for industry-leading architecture, design, engineering, property management, and consulting firms looking to further their commitment to Fitwel's healthy building movement. Contact [info@fitwel.org](mailto:info@fitwel.org) for more information.



For individuals looking to further their knowledge of the Platform and Standard and the evidence-based connection between health and the built environment, the **Fitwel Ambassador** program provides an accreditation to help advance your knowledge of Fitwel and allow you to further support clients. More information can be found at [fitwel.org/ambassadors](https://fitwel.org/ambassadors).

*\*Fitwel Champion and Provider companies receive access to dedicated Relationship Managers to support their use of Fitwel and their clients' use of Fitwel.*



Visit [www.fitwel.org](https://www.fitwel.org) for more information about Fitwel.

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