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# Chapter 5

## Licensing Protocol for EDGE Experts

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## 1. About this Document

### 1.1. Scope of this document

This document — *Chapter 5 Licensing Protocol for EDGE Experts* — set outs the process for individuals to get licensed as EDGE Experts.

### 1.2. Organization of the EDGE Protocol documents

The EDGE Protocol set outs detailed requirements to ensure that EDGE Certification Programs are implemented consistently around the world. The EDGE Protocol is the base of reference and underpins all EDGE training materials and guidance documents. Should there be any conflict between the EDGE Protocol documents and the supporting training and guidance materials, the EDGE Protocol shall take precedence.

Readers are encouraged to refer to the EDGE Glossary for key terms in the EDGE Protocol, which are identified in the text through capitalized nouns (e.g., Provider Territories).

It is recommended that the document *Chapter 1 EDGE Governance Protocol Overview* be read first for a comprehensive understanding of the EDGE Protocol. The operation of the EDGE Certification Programs in Provider Territories is dependent on several organizations working together to deliver services to Clients. *Chapter 1 EDGE Governance Protocol Overview* provides the roles and responsibilities of these organizations and their interrelationships, and the remaining EDGE Protocol documents provide the details.

It is also important that parties involved in the delivery of the EDGE Programs understand the process of periodic updates to the EDGE Protocol documents, and their responsibilities with respect to implementing these changes, as is set out in *Chapter 7 EDGE Update Protocol*.

### 1.3. Relation of this document to other Protocol documents

This document should be read in conjunction with *Chapter 2 EDGE Licensing Protocol for Certification Providers*, *Chapter 4 Licensing Protocol for EDGE Auditors*, and *Chapter 6 EDGE Certification Protocol*. These documents will provide EDGE Experts with an understanding of the EDGE Certification System processes and enable them to advise EDGE Clients more effectively.

## 2. Role and Eligibility

### 2.1. Role

The role of an EDGE Expert is to facilitate Clients' EDGE certification applications. Clients are not mandated to use an EDGE Expert for an EDGE project but may retain one if they require assistance.

1. The scope of the EDGE Expert's work includes green design advisory services to EDGE Clients and assistance with preparation of a Client's application for EDGE certification. This may include:
  - a) Assistance in understanding green design principles, the EDGE Standard, Software, and Certification System; and
  - b) Provision of informal, basic training on how to use the EDGE App, with the understanding that no qualification will be granted to participants that complete such a training.
2. The scope of the EDGE Expert's work does not include EDGE audit services, nor issuing Preliminary or final EDGE Certificates. A single individual may only have one of the following roles on a particular project: EDGE Expert; EDGE Auditor; or EDGE Certification Provider.

### 2.2. Eligibility Criteria

Individuals applying to be licensed as an EDGE Expert, must have one of the following educational/professional qualifications:



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1. Higher education (at least a bachelor's degree) qualification in a construction industry related field; or
2. A higher education (at least a bachelor's degree) qualification in another field, and three (3) years of experience working in the construction industry (as a skilled professional or tradesperson). The following are acceptable construction industry roles.
  - a) Architect
  - b) Architectural Technologist
  - c) Bid Manager
  - d) Building Surveyor
  - e) CAD Technician
  - f) Civil Engineer
  - g) Contracts Manager
  - h) Contractor
  - i) Construction Manager
  - j) Developer
  - k) Electrical Engineer
  - l) Estimator
  - m) Energy/Environmental Engineer
  - n) Facilities Manager
  - o) Mechanical Engineer
  - p) Planner
  - q) Procurement & Contracts Management
  - r) Quantity Surveyor
  - s) Site Engineer
  - t) Site Manager
  - u) Skilled Tradesperson
  - v) Structural Engineer

If the individual meets the eligibility requirement, they must follow the licensing process described in Section 3 to become an EDGE Expert.



### 3. EDGE Expert Licensing Process

#### 3.1. EDGE Expert Training Program

1. Candidates shall take the EDGE Expert training to qualify as an EDGE Expert.
  - a) EDGE Expert training options are available on the EDGE Buildings website<sup>1</sup>
  - b) There is no prerequisite to simply attend an EDGE Expert training. EDGE Clients or other Interested Parties not interested in qualifying as EDGE Experts may also attend the EDGE Expert training.
2. EDGE Expert training shall be provided by a licensed EDGE Faculty member or other licensed training provider.
  - a) EDGE Expert training is delivered by EDGE Faculty. A Certification Provider, the EO&M Team, or a third party designated by the EO&M Team may also deliver trainings in special cases.
  - b) Any EDGE Expert training not delivered by the EO&M Team or EDGE Faculty must be approved by the EO&M Team.
3. EDGE Expert training materials are developed, and periodically updated, by the EO&M Team.
  - a) These training materials belong to IFC. All training materials provided to licensed training providers, such as EDGE Faculty or EDGE Certification Providers, shall be returned to IFC if requested by IFC.
4. The mode of EDGE Expert training delivery shall be as described in *Chapter 3 EDGE Licensing for EDGE Faculty*.
5. The scope of the EDGE Expert training program shall include training in the EDGE Protocol. The EDGE Protocol training shall ensure, at a minimum, that EDGE Expert candidates gain a thorough understanding of:
  - a) The EDGE Certification processes as described in *Chapter 5 EDGE Certification Protocol*; and

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<sup>1</sup> The EDGE Buildings website address is [www.edgebuildings.com](http://www.edgebuildings.com)

- b) An overview of the responsibilities and lines of communication across the global EDGE Program, including the EO&M Team, EDGE Certification Providers, EDGE Faculty, EDGE Auditors, EDGE Experts and EDGE Clients as described in *Chapter 1 EDGE Governance Protocol Overview*.
6. The scope of the EDGE Expert training program shall include training in the EDGE App including:
- a) an understanding of all key EDGE Measures in EDGE App;
  - b) the EDGE App logic, methodology, interrelation of sections and measures, and knowledge of how the user inputs relate to the charts and results tab;
  - c) an understanding of the compliance requirements for EDGE measures as set out in the User Guide;
  - d) assumptions, standards, and methodologies used to calculate the local Base Case; and
  - e) practical use of the EDGE App using hands-on exercises.

Candidates who successfully complete the EDGE training will be eligible for the EDGE exam.

### 3.2. The EDGE Exam

All candidates must pass the written EDGE Exam testing their competency and understanding of the application of the EDGE Standard to obtain their EDGE Expert license.

1. After completing their training, candidates must take the EDGE Exam within two (2) months after receiving the eligibility ID for the EDGE Exam from the EDGE Faculty, unless a longer period is agreed upon with the relevant training provider.
  - a. If a candidate needs more time to take their exam, they must obtain special permission by contacting the EO&M Team at [edgeexam@ifc.org](mailto:edgeexam@ifc.org).
2. The EDGE Exam shall be developed by the EO&M Team who will invite EDGE Affiliates to provide input.
3. The EDGE Exam shall be administered and scored by an independent third-party examination body appointed by the EO&M Team.
4. The EDGE Exam shall test a candidate's knowledge of EDGE including:
  - a. The EDGE Certification process as described in *Chapter 6 EDGE Certification Protocol*;



- b. The EDGE methodology report;
  - c. The EDGE Standard, including:
    - i. All EDGE Measures; and
    - ii. Compliance requirements as set out in the User Guide;
  - d. The responsibilities and lines of communication across the global EDGE Program, including the EO&M Team, Certification Providers, EDGE Auditors and EDGE Clients, as articulated in the EDGE Expert training; and
  - e. Other elements of EDGE training added over time.
5. The EDGE Exam is offered in the English language and in a few other national language(s)<sup>2</sup>.
  6. The evaluation criteria and the minimum passing score shall be determined by the EO&M Team.
  7. Training providers provide the names of eligible exam candidates to the EO&M Team within seven (7) days after training completion. Candidates must take the EDGE Exam within 2 months after their names are submitted to the EO&M Team unless a longer period is otherwise agreed upon with the relevant training provider.
  8. If candidates fail the EDGE Exam, they may retake it once again within two months of the first attempt, unless a longer period is agreed upon with the relevant training provider.
    - a. If candidates do not pass the exam on the second attempt, they must retake the EDGE Expert training.
    - b. Questions on the retake exam will be different from the original EDGE Exam.
  9. The EO&M Team will notify the training providers when one of their candidates has passed the exam.

Upon passing the EDGE Exam, a candidate would be eligible to sign the EDGE Expert contract.

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<sup>2</sup> The EDGE Exam languages can be viewed at <https://www.prometric.com/edge>

### 3.3. Contract Agreement

1. As the final step in the licensing process, the candidate must sign the EDGE Expert Licensing and Participation Agreement with the EO&M Team. The agreement affirms that the candidate:
  - a) has the required professional qualifications; and
  - b) will abide by the EDGE Expert Code of Conduct described in *Section 4*.
2. Once the Agreement is signed, the EO&M Team issues an EDGE Expert certificate to the candidate and publishes their name on the EDGE website<sup>3</sup>.
3. Once licensed, EDGE Experts are allowed to use the EDGE Logo with the text 'EDGE Expert' in their email digital signature or business cards for as long as they maintain an active status.
  - a) The latest EDGE logo must be used<sup>4</sup>.

## 4. EDGE Expert Code of Conduct

By signing the EDGE Expert Participation Agreement, EDGE Experts agree to adhere to the following EDGE Expert Code of Conduct:

1. The EDGE Expert's role is limited to the scope described in Section 2.1;
2. The EDGE Expert will avoid any real or apparent Conflict of Interest, as defined in the *Glossary for the EDGE Governance Protocol*.
  - a) Conflict of interest includes, but is not limited to:
    - i) Business, family, or personal ties — with EDGE Certification Provider assigned to the project on which they are serving as EDGE Expert — that would impede an objective assessment of the project; and

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<sup>3</sup> The EDGE Buildings website is <https://edgebuildings.com>

<sup>4</sup> The latest EDGE logo is available at the EDGE Buildings website; search for '[Brand Assets](#)'

- ii) Taking on the additional role of EDGE Auditor or EDGE Certification Provider on the same project on which they are serving as EDGE Expert.
  - b) It is not a Conflict of Interest to take on additional roles that do not lie within the EDGE Certification System, such as, the role of architect, engineer, or another type of advisor.
- 3. The EDGE Expert commits to:
  - a) Compliance with national or international safety codes, whichever is more stringent, when visiting EDGE project sites;
  - b) Ethical behavior and high professional standards;
  - c) Sharing of concerns of Experts and Clients with relevant EDGE Certification Providers to provide a feedback loop to improve EDGE;
  - d) Compliance with this *Chapter 5 Licensing Protocol for EDGE Experts*;
  - e) Compliance with the EDGE Brand Asset Guidelines for Branding and Media available on the EDGE Buildings website;
  - f) Reporting instances of use of the EDGE brand by a Client contrary to the guidelines laid out in the EDGE Brand Assets documents<sup>5</sup>; and
  - g) Refraining from speaking negatively about other EDGE Experts, Auditors, Certification Providers, as well as the EDGE Certification Program.

## 5. Maintaining the EDGE Expert status

EDGE Experts will retain active status so long as they comply with the EDGE Expert Code of Conduct and keep their skills updated with the mandatory refresher training and updates provided by the EDGE Program. These update trainings are provided free of charge.

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<sup>5</sup> <https://www.edgebuildings.com/contact-us/brand-assets/>