

Proposal for EDGE Expert Services

NOTE TO EDGE EXPERTS

This is a sample template provided for the convenience of accredited EDGE Experts. Please customize this document according to your and your client's needs, schedules, and fees. Please consider the complexity of the project, its location, and whether the building is new construction, existing or refurbishment among other considerations.

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[Date]

[To]

[EDGE Expert Name] is pleased to have the opportunity to offer the following scope of services to [client] for the [Project name].

About EDGE

An innovation of IFC, EDGE ("Excellence in Design for Greater Efficiencies") is an online platform, a green building standard and a certification system for over 150 countries. The EDGE application helps to determine the most cost-effective options for designing green within a local climate context. EDGE can be used for buildings of all vintages, including new construction, existing buildings and major retrofits. More about EDGE is available from www.edgebuildings.com

About the EDGE Expert

[One paragraph introduction about the EDGE Expert and his/her experience].

About the Project

[Project name and short description]

EDGE Experts Scope of Work

The EDGE Expert's services are divided into two categories, Basic and Advanced. Basic services cover the administrative support to manage the EDGE Certification process. Advanced services cover the preliminary diagnostics and design assistance to ensure that the project meets EDGE criteria. Both of these categories are outlined in more detail below corresponding to the phases of the project.

EDGE EXPERT BASIC SERVICES

The following tasks will be performed as part of the EDGE Expert 'Basic' Services to get the above project EDGE certified. [Note that the project would skip the Preliminary Certification steps for existing buildings, or buildings already under construction, though some steps from Preliminary Certification may be needed by the Client].

Tasks – Basic Services

Project Kick-Off

- Task 1. Advise the client team on EDGE requirements via a 1-hour kick-off meeting, either in-person or via web conference.

Project Registration

- Task 2. Submit the project for registration in the EDGE App.
- Task 3. Ensure that the client has completed additional registration steps, including completing the Certification Agreement and paying the necessary fees.
- Task 4. Provide the EDGE registration confirmation email to the client.

Preliminary Certification

- Task 5. Act as project admin on behalf of the client within the online EDGE Audit and certification process.
- Task 6. Advise the client design team on requirements to prepare evidence documentation for the EDGE Audit and Certification processes via a 2-hour technical training with the client's design team, either in-person or via web conference.
- Task 7. Spot check evidence documentation prepared by the client regarding EDGE requirements within a maximum of 2 hours.
- Task 8. Along with the project team, act as Project Administrator and upload project documentation on the EDGE Application.
- Task 9. Submit the EDGE project for Auditing on behalf of the client.
- Task 10. Support the client on auditor or certifier questions and feedback within a maximum of 2 hours.

Final Certification

- Task 11. Advise the client construction team on requirements to prepare evidence documentation for the EDGE Audit and Certification processes via a 2-hour technical training with the client's construction team, either in-person or via web conference.
- Task 12. Spot check evidence documentation prepared by the client regarding EDGE requirements within a maximum of 2 hours.

- Task 13. Act as Project Administrator on behalf of the client within the online EDGE Audit and certification process.
- Task 14. Spot check evidence documentation prepared by the client regarding EDGE final certification requirements within a maximum of 2 hours.
- Task 15. Submit the EDGE project for Auditing on behalf of the client.
- Task 16. Support the client on auditor or certifier questions and feedback within a maximum of 2 hours.

Deliverables – Basic Services

Project Kick-Off

The EDGE Expert will deliver a one-hour kick-off meeting, either in-person or via web conference.

Project Registration

The EDGE Expert will register the project in EDGE after the client makes the due payment to the EDGE certification provider. The EDGE registration confirmation email will be provided to the client.

Preliminary Certification

The EDGE Expert will help the project receive the Preliminary EDGE Certificate.

Note that in case the project gets rejected for certification due to issues with the actual project information not matching the data provided by the client team to the EDGE Expert, then the EDGE Expert shall not be held responsible for the rejection of the project for certification. The EDGE Expert services shall be deemed to be complete and the fees due at this stage must be paid.

Final Certification

The EDGE Expert will help the project receive the Final EDGE Certificate.

Note that in case the project gets rejected for certification due to issues with the actual project information not matching the data provided by the client team to the EDGE Expert, then the EDGE Expert shall not be held responsible for the rejection of the project for certification. The EDGE Expert services shall be deemed to be complete and the fees due at this stage must be paid.

Schedule and Fees – Basic Services

The schedule of tasks and fees is as below:

Task	Timeline	Fees
Project registration	1 business day	
Preliminary certification	5-10 business days	
Final certification	5-10 business days	
Subtotal	10-20 business days	

The days of work represent the approximate timeline of delivery, which depends on the project complexity. The precise Schedule of delivery will depend on the schedules of the Expert and Client, as the involvement of the EDGE Expert with the project is ongoing.

The Timeline above does not include time for Auditor Certifier review. It will take additional days for receiving Preliminary or Final certification after Auditor and Certifier review.

Exclusions – Basic Services

This fee proposal does not include the EDGE Auditor or the EDGE Certifier fees.

This fee proposal does not include any modeling such as energy, CFD, or wind outside the EDGE app.

This proposal does not include the Advanced Services described below.

EDGE EXPERT ADVANCED SERVICES

In addition to the basic services described above, the following tasks will be performed as part of the EDGE Expert ‘Advanced’ Services to get the project EDGE certified.

Tasks – Advanced Services

Project kick-off

Task 1. Complete the EDGE self-assessment for the client’s project.

Project Registration

Tasks for project registration are covered under Basic Services.

Preliminary Certification

Task 2. Advise the client on appropriate measures to select for the project in order to meet the EDGE Standard.

Task 3. Create different scenarios for additional interventions needed to meet the EDGE standard and present to the client along with cost-benefit analysis from EDGE for decision-making.

Task 4. Perform research and calculations for EDGE measures using EDGE calculators or simple external calculations.

Task 5. Advise the client on technical specifications to include in the professional drawings, schedules and tender documents to satisfy EDGE requirements.

Task 6. Advise the client on Auditor questions and provide recommendations up to the project certification decision.

Final Certification

Task 7. Help the client match the technical specifications and manufacturer data of the selected products with EDGE measures and requirements.

Task 8. Coordinate with the construction team via site visits and take photographs to ensure that the measures are being installed as specified.

- Task 9. Advise the client on Auditor questions and provide recommendations up to the project certification decision.
- Task 10. Represent the project team during the site visit by the Auditor.

Deliverables – Advanced Services

Project kick-off

The EDGE Expert will provide the results of the project assessment to the client to decide on next steps.

Project Registration

Deliverables for project registration are covered under Basic Services.

Preliminary Certification

The EDGE Expert will provide the client with the following:

- A list of possible measures to meet the EDGE criteria.
- Different scenarios with various possible combinations of measures resulting in different savings and paybacks for a client to choose from.
- Advice on technical specifications for the selected measures.
- Responses to auditor questions, and recommendations on how to meet the requirements as per Auditor feedback.

As noted previously, in case the project gets rejected for certification due to issues with the actual project information not matching the data provided by the client team to the EDGE Expert, then the EDGE Expert shall not be held responsible for the rejection of the project for certification. The EDGE Expert services shall be deemed to be complete and the fees due at this stage must be paid.

Final Certification

The EDGE Expert will provide the client with the following:

- Advice on technical specifications for the final selected measures.
- Responses to auditor questions, and recommendations on how to meet the requirements as per Auditor feedback in the final certification stage.

As noted previously, in case the project gets rejected for certification due to issues with the actual project information not matching the data provided by the client team to the EDGE Expert, then the EDGE Expert shall not be held responsible for the rejection of the project for certification. The EDGE Expert services shall be deemed to be complete and the fees due at this stage must be paid.

Schedule and Fees – Advanced Services

The schedule of tasks and fees is as follows (please note the schedule includes the scope of work of both Basic and Advanced services):

Task	Timeline	Fees
Project registration	1 business day	
Preliminary certification	10-15 business days	
Final certification	10-15 business day	
Subtotal	20-30 business days	

The days of work represent the approximate timeline of delivery, which depends on the project complexity. The precise Schedule of delivery will depend on the schedules of the Expert and Client, as the involvement of the EDGE Expert with the project is ongoing.

The Timeline above does not include time for Auditor Certifier review. It will take additional days for receiving Preliminary or Final certification after Auditor and Certifier review.

A fee proposal for optional services can be provided upon client request.

Exclusions – Advanced Services

This fee proposal does not include the EDGE Auditor or the EDGE Certifier fees.

This fee proposal does not include any modeling such as energy, CFD, or wind outside the EDGE app.

Confidentiality and Disclaimer

All information in this proposal must remain confidential between the client and the EDGE Expert. Any disclosure must be made only after a written agreement between the two parties.

The contents of this document and all services described herein (the “Content”) are solely those of the EDGE Expert pertaining to EDGE Expert services. IFC does not guarantee the accuracy, reliability or completeness of the Content, or for the conclusions or judgments of the Content, and accepts no responsibility or liability for any omissions or errors (including, without limitation, typographical errors and technical errors) in the Content whatsoever or for reliance thereon.

We look forward to helping you achieve EDGE Certification for your project.

[Signed]