



# Chapter 8

## Approval Protocol for EDGE Experts

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## Approval Protocol for EDGE Experts

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# Approval Protocol for EDGE Experts

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## 1. About this Document

### 1.1. Scope of this document

This document, the *Chapter 8 Approval Protocol for EDGE Experts*, is designed to set out the process which individuals must follow to work as an EDGE Expert.

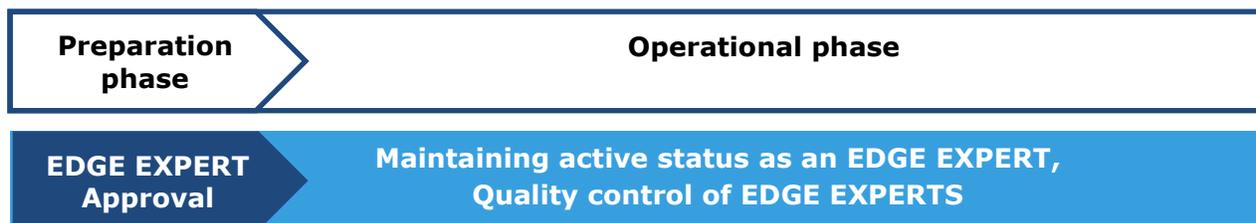


Figure 1 Components of the Approval Protocol for EDGE Experts

### 1.2. Organization of the EDGE Protocols

The *Chapter 1 EDGE Governance Structure Overview* document provides a comprehensive overview of the whole EDGE Protocols, and therefore should be read first.

This document should be read in conjunction with the *Chapter 4 Approval Protocol for Auditors* and *Chapter 5 EDGE Certification Protocol*, and depending on the type of market which the EDGE Certification Program is planned, either the *Chapter 2 EDGE Approval Protocol for Local Partners* (where a market transformation strategy is being implemented in a priority market with a Local Partner) or the *Chapter 3 EDGE Approval Protocol for Global Partners* (where a Global Partner provides auditing and certification services in response to Client demand, across multiple geographies). These documents are important to understand the EDGE Certification System and hence to be able to advise EDGE Clients on how to implement it for their projects.

Readers are encouraged to refer to the *EDGE Glossary* to help them understand the key terms which define the EDGE Protocols, which are identified in the text through capitalized nouns (e.g., Local Market).

It is also important that parties involved in the delivery of the EDGE Protocols understand the process for periodically updating the EDGE Protocol documents. This is set out in the *Chapter 7 EDGE Update Protocol*.

This *Chapter 8 Approval Protocol for EDGE Experts* document, along with the remainder of the EDGE Protocols, sets out detailed requirements to ensure that the EDGE Protocols are implemented consistently around the world. The EDGE Protocols are the base reference and underpin all EDGE training material and guidance documents. Should there be any conflict between the EDGE Protocols and the supporting training and guidance materials produced, the EDGE Protocols shall take precedence.

### 1.3. Roles and Responsibilities

The operation of the EDGE Certification Programs in Local Markets is contingent on a number of organizations working together to maintain the system and deliver services to Clients. The roles and responsibilities of these organizations, and their interrelationship is provided in the overview in *Chapter 1 EDGE Governance Structure Overview*, and detailed through the remaining EDGE Protocol documents.

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The *Chapter 8 Approval Protocol for EDGE Experts* applies to all situations where a potential Client is seeking EDGE Certification, irrespective of whether the EDGE Certification Program is being operated in the Local Market by a Local Partner or a Global Partner.

In order to work as an EDGE Expert, the applicant must take the EDGE Exam, and sign the EDGE Expert Agreement (affirming they have the required professional qualifications and abide by the EDGE Expert Code of Conduct).

### 2. Purpose and Role of the EDGE Expert

- 2.1. The purpose of the EDGE Expert is to improve EDGE Clients' understanding of green design principles, the EDGE Standard, Software, and Certification System and to facilitate Clients' EDGE applications if they need assistance.
- 2.2. The scope of the EDGE Expert's work includes advice to Clients on green design and assistance with preparation of a Client's application for certification. Within this context, EDGE Experts may provide informal, basic, training on how to use the EDGE software as needed, on the understanding that no qualification be granted to participants that complete such a training.
- 2.3. The scope of an individual EDGE Expert's responsibilities does not include EDGE audit services, nor issuing Preliminary or EDGE Certificates. A single individual may never have more than one of the following roles in the context of a particular project: EDGE Expert; EDGE Auditor; and EDGE Certifier.

### 3. EDGE Expert Qualifications

- 3.1. An EDGE Expert must have **one** of the following educational / professional qualifications:
  - i) Higher education qualification in a construction industry related field; **or**
  - ii) Three (3) years' experience working in the construction industry (as a skilled professional or tradesperson) and a higher education qualification (not necessarily in a construction industry related field). Acceptable construction industry roles include:
    - 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

### 4. EDGE Expert Training Program

- 4.1. Training is required prior to taking the EDGE Exam. The EO&M Team shall develop and from time to time update training materials. These materials belong to IFC and in the event these materials are provided to Partners, all provided training materials shall be returned to IFC at IFC's request.
- 4.2. EDGE Expert training may be delivered by the EO&M Team, a third party designated by the EO&M Team, or a Partner. Partners and the EO&M team will consult with each other when organizing trainings, which may be held in person or via the internet. The Local Partner will be given the right of first refusal to host or conduct any EDGE Expert training delivered in person in their Local Market.
- 4.3. Any EDGE Expert training program or trainer not delivered by or not part of the EO&M Team should be approved by the EO&M Team.
- 4.4. The EDGE Expert training may be delivered through a variety of platforms, including classroom instruction, written materials, web-based training and other information and communications technology methods.
- 4.5. If any fee is charged for EDGE Expert training it is considered an EDGE Fee and therefore will be subject to revenue sharing arrangements with IFC.
- 4.6. There will be no pre-requisite for anyone to attend an EDGE Expert training. EDGE Clients or other Interested Parties with no interest in qualifying as an EDGE Expert will be encouraged to do so.
- 4.7. The scope of the training program shall at a minimum include the EDGE Protocols training described below.
  - 4.7.1. The EDGE Protocols training shall ensure potential EDGE Experts gain a thorough understanding of:
    - i) The EDGE Certification processes as defined in the Chapter 5 EDGE Certification Protocol.
    - ii) The EDGE Software, and the Local Adaptation where applicable, including:
      - a. an understanding of all EDGE Measures;
      - b. the EDGE Software logic, methodology, inter-relation of sections and measures, and knowledge of how the user's inputs relate to the charts and results tab;
      - c. an understanding of the detailed compliance requirements as set out in the User Guide;
      - d. assumptions, standards and methodologies used to calculate the local Base Case;
      - e. the practical use of the EDGE software from hands-on exercises.

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- 4.7.2. The EDGE Protocols training shall include an overview of the responsibilities and lines of communication across the global EDGE Program, including the EO&M Team, Local Partners, Global Partners, EDGE Auditors, EDGE Experts and EDGE Clients.
- 4.8. Records of attendance shall be kept for all training, whether delivered face-to-face or using other media. Such records will include attendee feedback, including an overall rating of the quality of the training on a scale of 1 (poor) to 5 (excellent).

## 5. The EDGE Exam

- 5.1. All applicants must sit and pass the written EDGE Exam testing their competency and understanding of the application of the EDGE Standard.
- 5.2. The EDGE Exam shall be administered and scored by an independent third party examination body appointed by the EO&M Team.
- 5.3. The EDGE Exam shall be developed by the EO&M Team who will invite EDGE Partners to provide input.
- 5.3.1. The EDGE Exam shall test knowledge of the following:
- i) The EDGE Certification process as defined in the Chapter 5 EDGE Certification Protocol;
  - ii) EDGE methodology report;
  - iii) The EDGE Standard, including:
    - a. All EDGE Measures;
    - b. The detailed compliance requirements as set out in the User Guide;
  - iv) The responsibilities and lines of communication across the global EDGE Program, including the EO&M Team, Local Partners, Global Partners, EDGE Auditors and EDGE Clients;
  - v) Other elements of the EDGE training as it may vary from time to time.
- 5.3.2. The EDGE Exam will be offered initially in English and eventually in the national language(s) of the applicable Local Market.
- 5.4. The evaluation criteria and the minimum scores required for approval shall be determined by the EO&M Team.
- 5.5. Partners will present names of eligible exam candidates to the EO&M Team immediately after training. 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 with the relevant Partner.
- 5.6. If candidates fail the EDGE Exam, they may retake it once again within two months of the first attempt, unless a longer time period is agreed with the relevant Partner. If candidates do not pass the exam on the second attempt they should retake the training. Retaken exams will be different from the original EDGE Exam.
- 5.7. The EO&M Team will notify Partners when one of their candidates has passed the exam.

### 6. EDGE Expert Approval and Code of Conduct

- 6.1. If the applicant sits and passes the EDGE Exam, and signs the EDGE Expert Participation Agreement, they shall be approved as an EDGE Expert upon application to the EO&M Team, who will issue to them a certificate and publish their name on the EDGE website<sup>1</sup>.
- 6.2. Any EDGE Auditor or Interim EDGE Auditor can become an EDGE Expert upon signing the EDGE Expert Participation Agreement.
- 6.3. By applying for EDGE Expert status, candidates affirm they have the required professional qualifications as laid out in section 3 above and also agree to adhere to the following EDGE Expert Code of Conduct:
  - 6.3.1. The EDGE Expert's role is limited to improving EDGE Clients' understanding of green design, the EDGE Standard, Software, and Certification System and to facilitate Clients' EDGE applications;
  - 6.3.2. The EDGE Expert will avoid any actual or apparent conflict of interest, including due to business, family or personal ties, taking on the role of more than just EDGE Expert within the EDGE Certification System (e.g. the role of Auditor or Certification Provider) in any one project (for the avoidance of doubt, taking on the role of architect, engineer or other adviser in addition to EDGE Expert is not a conflict of interest because those roles do not lie within the EDGE Certification System), or any other cause;
  - 6.3.3. The EDGE Expert commits to:
    - 6.3.3.1. Compliance with national or international safety codes, whichever is more stringent, when visiting sites;
    - 6.3.3.2. Ethical behavior and high professional standards;
    - 6.3.3.3. Sharing of concerns of Experts and Clients with relevant EDGE Partners to provide a feedback loop to improve EDGE;
    - 6.3.3.4. Compliance with this Chapter 8 EDGE Expert Approval Protocol;
    - 6.3.3.5. Compliance with the EDGE Partnership Guidelines for Branding and Media (EDGE Branding and Media Guidelines);
    - 6.3.3.6. Reporting instances of use of the EDGE brand by a Client contrary to the guidelines laid out in the EDGE Brand Assets Document (<https://www.edgebuildings.com/contact-us/brand-assets/>);

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<sup>1</sup> [www.edgebuildings.com](https://www.edgebuildings.com)

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6.3.3.7. Refrain from speaking negatively about other EDGE Experts, Auditors, Partners as well as the EDGE Certification and other green building certification programs.

### 7. Maintaining active status as an EDGE Expert

7.1. EDGE Experts will retain active status so long as they comply with the EDGE Expert Code of Conduct and skills update requirements as may arise from time to time.

### 8. EDGE Experts' Rights

8.1. EDGE Experts are expected to follow the [Guidelines for EDGE Experts and EDGE Auditors](#) and can learn how to better promote their services through the [Branding Guidelines for EDGE Experts](#). They are allowed to use the EDGE Logo in their email digital signature, on their business cards, on their website, and on their LinkedIn profile for as long as they maintain their active status.

