



PV Nature

Project Design Document (PDD) Review

Terms of Reference for Technical Review Panel (TRP) Member

Version 1.0

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1 About Plan Vivo

1.1 Plan Vivo

Plan Vivo (PV) Foundation (PVF) is a registered UK charity, based in Edinburgh, that supports vulnerable rural communities across the world to develop innovative nature-based solutions to reduce poverty, conserve important ecosystems and tackle climate change - through our stewardship of the Plan Vivo Standards.

1.2 Plan Vivo Biodiversity Standard (PV Nature)

The Plan Vivo Biodiversity Standard (PV Nature) is a stand-alone certification which is a core set of social, environmental and governance requirements that projects must meet to become certified under PV Nature. PV Nature is aimed at generating high-integrity Plan Vivo Biodiversity Certificates (PVBCs) that deliver robust and credible benefits for nature but also deliver both social and climate benefits. PV Nature is fully aligned with the high-integrity principles developed by Plan Vivo, Fauna & Flora and Carbon Tanzania - ensuring holistic impact (for nature, climate and communities). Through a transparent and participatory approach ensuring equitable benefit-sharing for communities involved. Projects certified under PV Nature will generate PVBCs using the PV Nature Methodology. These are in line with the Nature Positive movement and buyers cannot use them as offsets.

Plan Vivo and in-country partners support communities and smallholders to pass the rigorous certification process. We thereby enable access to finance from ecosystems services and nature-based solutions, supporting community-led conservation and restoration to deliver impact for climate, communities and nature.

1.3 Certification Route

To become certified against PV Nature, a project must submit a Project Design Document (PDD) that describes all elements of the project's design, including the biodiversity benefits that the project will achieve from its selected project interventions. To evaluate the outcomes they achieve for biodiversity, projects must apply the PV Nature Methodology using approved methodological tools for specific plant and animal groups and habitats.

To ensure that best practice is followed, a Project's application of the PV Nature Methodology, as outlined in the Technical Specifications of the PDD, must be reviewed by the Plan Vivo Technical Review Panel (TRP). In addition, review of the project design and interventions detailed in various sections of the PDD must be reviewed by the TRP to ensure conformance with the PV Nature Project Requirements.

2 Scope of work

The role of the TRP Member is to review the relevant PDD sections and its conformance with the PV Nature Project Requirements, and the appropriateness of the Technical Specifications. The TRP Member must use the PDD Review Report provided in Annex 2 to ensure that:

1. The relevant PDD sections identified for TRP review are compliant with the PV Nature Project Requirements;
2. The Technical Specifications are compliant with the PV Nature Project Requirements; and PV Nature Methodology.

To achieve this, the TRP Member will carry out an initial screening of the relevant sections of the PDD falling within the scope of its review. The PDD will then be returned to the Project to address the feedback received, after which the TRP Member will complete a second review of the PDD. Following the TRP Member's reviews, Plan Vivo will consolidate feedback, and any remaining findings are identified and shared with the Independent Expert or Validation and Verification Body (VVB) to investigate during the audit (see Annex 1 for an illustration of all stages).

The relevant sections of the PDD which fall within the scope of the TRP Member's review are outlined in the PDD Review Report (see Annex 2). Please note that, while the selected TRP Member is expected to review the Project's biodiversity monitoring approach, this component has already undergone a rigorous technical assessment by the Project's appointed Data Analytical Provider (DAP). The DAP has reviewed the selected target groups and the suitability of the monitoring methodologies and tools proposed for those groups in line with the PV Nature Methodology. Consequently, Plan Vivo does not anticipate significant comments or revisions relating to this aspect of the Technical Specification.

3 Review Process

3.1 Communication and Reporting

Plan Vivo will contact the TRP Member roster via Loomio when opportunities for reviews are available. TRP Members have one week to indicate interest by responding via email, after which one, or more than one depending on the opportunity, reviewer is selected based on knowledge, skills, and abilities needed for the requirements of the opportunity.

Once the TRP Member is selected, Plan Vivo will convene a kick-off meeting to go over the review process. Relevant documentation, templates and guidance will be provided to support the review and facilitate the structured submission of feedback. All feedback and documentation will be shared between the TRP Member and Project Coordinator through the Plan Vivo, thereby allowing anonymity for the TRP Member. Anonymity may be waived, at the discretion of the TRP Member, to discuss feedback directly with the Project Coordinator.

3.2 PDD Review Stage

Using the PDD Review Report, the TRP Member should identify and categorise any review findings into the following categories:

- Corrective Action Requests (CARs), which represent instances where:
 - A criterion of the Project Requirements has not been fulfilled;
 - A non-conformance with the PV Nature Project Requirements and/or PV Nature Methodology resulting in a deviation between the measured and actual Biodiversity Benefits achieved.
- New Information Requests (NIRs), which indicate that:
 - The information given is insufficient or not clear enough to determine whether the Project Requirements have been met;
- Forward Action Requests (FARs), which indicate that:
 - A CAR or NIR cannot be resolved through a desk-based review and must be included in the Validation audit, which will be assessed during the site visit by the VVB.

After receiving feedback from the TRP Member, the Project Coordinator will be able to update their PDD and respond to any feedback raised in the PDD Review Report.

4 Qualifications

To review Project documentation, the TRP Member must have:

- **Expert knowledge of the Project intervention(s) applied by the given Project** - demonstrated by: i) previous involvement in the development, implementation, evaluation or Validation/Verification of Projects with similar interventions and their likely impact on biodiversity; or ii) experience conducting scientific research related to the intervention.
- **Basic knowledge of the given Project context** - demonstrated by: i) previous experience in development, implementation, evaluation or Validation/Verification of Projects in a similar location or ecoregion and/or similar environmental and social context; or ii) experience conducting scientific research in a similar location and/or similar environmental and social context.
- **Clear understanding of the PV Nature Methodology and expertise in the selected target/taxonomic groups monitored by the Project** - demonstrated by: i) previous involvement in the development, implementation, evaluation or Validation/Verification of Projects monitoring similar target groups; ii) knowledge of digital tools used for biodiversity data collection iii) experience in applying sampling plans for same biodiversity in a similar ecoregion; and iii) completion of specific training relating to the PDD review process.

5 Warning and Suspensions

If Plan Vivo finds that a TRP Member has failed to meet Plan Vivo's standards due to:

- Persistent issues with performance (including timeliness of completing reviews)
- Serious allegations regarding fraud, e.g. bribes or deliberately misleading statements; or
- Reasonable doubt that this TRP Terms of References are not being followed

Plan Vivo may require the TRP Member to undertake specified corrective actions. Plan Vivo may, at its own discretion, issue warnings, temporary suspensions, and notices to correct. It may also disqualify TRP Members from future PDD reviews for Plan Vivo.

6 Grievances

Where appropriate, the Project and Plan Vivo have a right to raise any concerns that they might have regarding the quality, quantity, accuracy, impartiality or timeliness of the feedback provided by the TRP Member.

In such instances, the Plan Vivo may contact alternative experts to gather evidence as to the appropriateness of the grievance. In the instance that the grievance is substantiated, the Plan Vivo will attempt to work with the TRP Member to resolve the matter. Where this is deemed not possible, the review process will terminate, and the TRP Member will not be remunerated. Any grievances held by the TRP Member or a Project against the Plan Vivo can be raised through the Grievance Mechanism found on the Plan Vivo website¹, which provides details on how to submit a grievance and how it is handled.

7 Conflicts of Interest

TRP Members must identify, disclose and actively manage any actual, potential or perceived conflicts of interest that could compromise, or appear to compromise, their independence, objectivity or professional judgement.

TRP Members shall:

- Disclose conflicts upon being accepted as the selected TRP Member for PDD review.
- Notify Plan Vivo immediately if new conflicts arise.

Plan Vivo reserves the right to require a TRP Member to withdraw from specific project reviews, where a conflict of interest cannot be adequately managed.

Failure to disclose relevant conflicts may result in suspension or termination of TRP membership.

8 Confidentiality

All information or project details shared by Plan Vivo to TRP Members shall be treated as confidential and must not be disclosed to any other party at any time during or after Project reviews without written permission from the Plan Vivo.

All information received from Plan Vivo, projects, communities, validation and verification bodies, or other stakeholders in connection with PV Nature shall be treated as confidential unless already in the public domain.

TRP Members shall:

- Use confidential information only for approved PV Nature purposes.

¹ <https://www.planvivo.org/about-us/governance>

- Not disclose information to third parties without prior written consent.
- Apply appropriate safeguards to protect confidential information.

Upon termination of TRP membership or upon request from Plan Vivo, confidential information shall be securely returned or destroyed unless retention is required by law.

These confidentiality obligations shall survive termination of TRP membership.

9 Time Input and Remuneration

The expected time input and remuneration offered for TRP tasks are summarised below. Plan Vivo reserves the right to amend any element of this table and will provide the TRP Members with 60-days notice prior to amendments coming into effect. If during an engagement the task requires more time or schedule adjustments, the TRP Member and Plan Vivo will discuss the necessary amendment and any additional remuneration associated with such amendment, and that amendment will be agreed to by the Parties in writing.

The expected time input and remuneration offered for TRP tasks is summarised in Table 1.

Table 1. Indicative time inputs and remuneration rates for TRP tasks.

Task	Indicative time input	Schedule	Remuneration (currency for all fees is GBP)
Project Design Document Technical Review	~5h for initial review (first round) and up to 4h for reviewing subsequent project responses (second round)	Initial review and feedback within 2 weeks of receiving documents from Plan Vivo and within two weeks of receiving the Project's responses and amendments from initial review	£500
Conservation project eligibility check for meeting either 1 Key Biodiversity Area (KBA) Criterion, or 2	~1h for initial review and up to 1h for responses	Included in the PDD review schedule above	£100

Important Plant Area (IPA) sub-criteria			
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10 Late Performance

The Parties acknowledge the importance of timely completion of the TRP review to support project certification timelines. Where a service is not completed by the due date, a late performance penalty due in amount equal to two percent (2%) of the payment due for each day after the due date until the payment is made.

Plan Vivo acknowledges that unforeseen circumstances may occasionally affect delivery timelines. TRP Members are encouraged to notify Plan Vivo as early as possible if they anticipate any delays. Where justified, extensions to the review period may be agreed in writing by both Parties, and the delivery schedule adjusted accordingly.

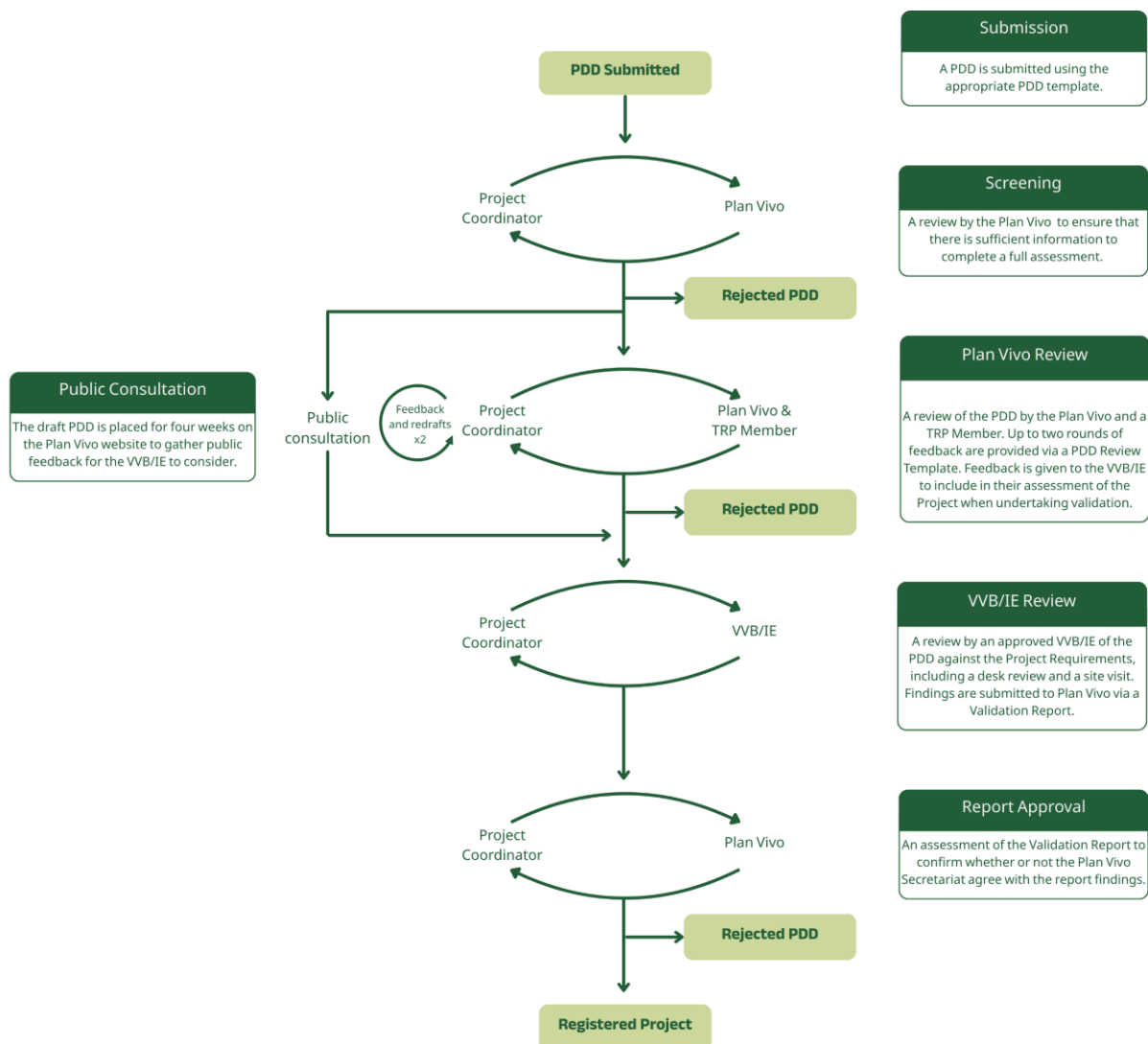
11 Signature

Full Name:

Signature:

Date:

Annex 1 – PDD Review Process Flowchart



Annex 2 – PDD Review Report

Please see the accompanying Excel file.