

# Plan Vivo Technical Review Panel (TRP) Terms of Reference

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## 1. Definitions and Acronyms

Definitions used in this document follow the latest version of the PV Climate Glossary<sup>1</sup> and are capitalised and italicised, and the following additional terms:

- ACORN Design Document – Document describing the Project design and implementation process, and details that the Project demonstrates conformance with the ACORN Programme
- Methodology concept note – Concept note for the Methodology submitted to Plan Vivo for approval prior to the development of a Methodology

Acronyms used in this document include:

ACORN Programme – Agroforestry CRUs for the Organic Restoration of Nature  
ADD – ACORN Design Document  
CRU – Carbon Removal Unit  
ES – ecosystem services  
NBS – nature-based solutions  
PDD – Project Design Document  
PV Climate – Plan Vivo Carbon Standard  
PVF – Plan Vivo Foundation  
PV Nature – Plan Vivo Biodiversity Standard  
TRP – Technical Review Panel  
VCM – voluntary carbon market  
VVB – Validation and Verification Body

## 2. Background

The Plan Vivo Foundation (PVF) is a registered UK charity, based in Edinburgh, that supports vulnerable rural communities across the world to develop innovative nature-based solutions (NBS) to reduce poverty, conserve important ecosystems and tackle climate change - through our stewardship of the Plan Vivo Carbon Standard (PV Climate), Plan Vivo Biodiversity Standard (PV Nature) and ACORN Programme (Agroforestry CRUs for the Organic Restoration of Nature).

PV Climate is a core set of social, environmental, and governance requirements that *Projects* must meet to become *Certified*<sup>2</sup>. PVF and in-country partners support communities and smallholders to pass the rigorous certification process and enable access to finance from the ecosystems services (ES) and voluntary carbon market (VCM) to support community-led forest conservation, restoration and agroforestry to deliver impact for climate, communities and nature.

The Standard is internationally recognised for its focus on ethical and fairly-traded climate services, which ensures that a greater share of income reaches those that most need it. Our unique model ensures that at least 60% of benefits go back to the communities on the ground, which has a significant impact on strengthening resilience for vulnerable communities and reducing drivers of deforestation. Through our collaborative approaches and focus on smallholders and communities we have achieved a significant impact over the last 25 years.

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<sup>1</sup> Available at <https://www.planvivo.org/pv-climate-documentation>

<sup>2</sup> <https://www.planvivo.org/Pages/Category/projects?Take=28>

The ACORN Programme has been developed by the Dutch Cooperative Bank Rabobank and is certified by Plan Vivo. It is the first dedicated programme for smallholder agroforestry in the VCM and aligns closely with PV Climate. ACORN introduces a scalable agroforestry and carbon sequestration monitoring system, using remote sensing technology and a pan-programme sampling strategy for auditing to minimise the costs to projects and give 80% of the income from their Carbon Removal Units (CRUs) to *Project Participants*<sup>3</sup>.

### 3. Certification Routes

To become Certified against PV Climate, a project must submit a *Project Design Document (PDD)* that describes all elements of the Project's design, including the Carbon Benefits that the Project will achieve from its interventions. To estimate this, a Project must apply a Plan Vivo-approved Methodology.

Projects that become *Certified* under the ACORN programme must submit an ACORN Design Document (ADD) that describes all elements of the *Project's* design. They must then apply, with the support of Rabobank, the approved ACORN methodology for their *Carbon Benefit* quantification.

To ensure that best practice is followed all new *Methodologies* must undergo the *Methodology* assessment process, including a review by the Technical Review Panel (TRP).

### 4. TRP Functions

The TRP is a roster of experts who help to ensure that PV Climate and ACORN *Projects* adhere to the requirements in their respective programmes with regard to the estimation and monitoring of *Carbon Benefits*.

The functions of the TRP are for individual members to conduct:

- Technical reviews of *Microscale Projects* as part of the PV Climate *Microscale Project Validation* process
- Initial technical reviews of *Macroscale Projects* prior to review by an approved *Validation and Verification Body (VVB)*, and a final technical review of the *PDD* and Validation Report prior to approval by Plan Vivo Foundation
- Initial technical reviews of ACORN Design Documents prior to review by an approved *VVB*, and a final technical review of the ACORN Design Document and Validation Report prior to approval by Plan Vivo Foundation
- Reviews of new methodology concept notes
- Reviews of *Methodologies* prior to assessment by an approved *VVB*, and a final assessment of *Methodologies* and methodology review reports prior to approval by Plan Vivo Foundation

Some TRP reviews will be assessed on an ad-hoc basis by a nominated TRP Member through a peer-review process to guarantee the quality of reviews.

For more details, please note that the terms of reference for the above-mentioned functions are available on the Plan Vivo website<sup>4</sup>.

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<sup>3</sup> <https://acorn.rabobank.com/en/projects/>

<sup>4</sup> Available at <https://www.planvivo.org/recruitment-technical-review-panel>

## 5. TRP Member Opportunity Notification

The Plan Vivo Foundation will contact the TRP 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.

## 6. TRP Member Selection Eligibility Criteria; Conflicts of Interest

All TRP Members must have an in-depth understanding of at least one Plan Vivo-approved *Methodology, Module or Tool* (or similar) – demonstrated by:

- Previous involvement in the development, implementation, or *Validation/Verification of Projects* applying the same, or very similar, *Methodologies*;
- Contributions to the development of similar *Methodologies*; or
- Completion of specific training relating to the application of the *Methodologies*.

To carry out a technical review or initial screening of *Project* documentation, a reviewer must have:

- Expert knowledge of the *Project Intervention(s)* applied by the given *Project* - demonstrated by:
  - Previous involvement in the development, implementation, evaluation or *Validation/Verification of Projects* with similar interventions; or
  - Experience conducting scientific research related to the intervention.
- Basic knowledge of the given *Project* context - demonstrated by:
  - Previous experience in the development, implementation, evaluation or *Validation/Verification of projects* in a similar location and/or similar environmental and social context; or
  - Experience conducting scientific research in a similar location and/or similar environmental and social context.
- In-depth understanding of the *Carbon Benefit Methodologies, Modules and Tools* applied by the given *Project* - demonstrated by:
  - Previous involvement in the development, implementation, evaluation or *Validation/Verification of Projects* applying the same (or very similar) *Methodologies*;
  - Contributions to the development of similar *Methodologies*; or
  - Completion of specific training relating to the application of the *Methodologies*.

In addition to the above criteria, to peer review other TRP Members' reviews of *Project* documentation, TRP Members must have:

- Passed the peer review process to become an approved reviewer – demonstrated by:
  - Competence in the application of the *Methodology* used by the *Project*, as evidenced by past reviews of *Technical Specifications* using the same *Methodology*

If the peer review process identifies any issues with the overall quality of a TRP Member's review, the Plan Vivo Foundation will contact the TRP Member to discuss the matter further. If necessary, the TRP Member may be recommended for additional training, the scope of their reviews may be limited, or their membership on the roster may be revoked.

TRP Members will be excluded from participation in the review or screening of any *Project* documentation, methodology concept note, or *Methodology* if they, or an organisation that employs them, have played any role in its development, or is set to benefit from the approval or denial of the proposed *Project/Methodology*. **TRP Members must disclose any actual, potential, or perceived conflicts of interest that could affect their involvement in the TRP Roster. Please contact the Plan Vivo Foundation for more information about managing conflicts of interest.**

## 7. Methodology Review Eligibility

To review methodology concept notes and review *Methodologies*, *Modules* or *Tools*, a reviewer must have expert knowledge of the procedures applied in the *Methodology*, *Module* or *Tool* – demonstrated by:

- Previous experience developing or assessing similar *Methodologies*;
- Previous involvement in the development, implementation, or *Validation/Verification* of *Projects* applying similar *Methodologies*; or
- A track record of scientific research relevant to the full scope of the *Methodology*, *Module* or *Tool*.

Where a *Methodology*, *Module*, or *Tool* covers multiple areas of expertise, the Plan Vivo Foundation may request multiple TRP Members to review different elements of the submitted document.

## 8. Time input and remuneration

The expected time input and remuneration offered for TRP tasks are summarised below. Plan Vivo Foundation 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 Foundation 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.

Task	Indicative time input	Schedule	Remuneration (currency for all fees is USD)
Project Design Document Technical Review (Microscale)	~5h for initial review and up to 4h for reviewing subsequent project responses	Initial review and feedback within 3-weeks of receiving documents from Plan Vivo	\$600
Project Design Document Technical Review (Macroscale)	~5h for initial screening and up to 2h for reviewing project responses after VVB process	Initial screening and feedback within 3-weeks of receiving documents from Plan Vivo	\$400
Project Design Document Technical Peer Review	~5h for initial review and up to 3h for reviewing TRP Member responses	Initial review and feedback within 3-weeks of receiving documents from Plan Vivo and 2-	Variable - Assessment fees will be negotiated between the Parties at the time of Task Order issuance and determined based on whether the project is

		weeks to review TRP Member feedback	following the microscale or macroscale project validation routes.
Methodology, Module, or Tool Concept Note Review	~2h for initial review and up to 2h for reviewing responses	Initial review and feedback within 2-weeks of receiving documents from Plan Vivo	\$250
Methodology, Module or Tool Review	Variable	Initial review and feedback within 4-weeks of receiving documents from Plan Vivo	Variable - Assessment time inputs will be negotiated between the Parties at the time of Task Order issuance and fees will be determined based on the scope and complexity of the submitted documentation.
Updated Technical Specification Review	Variable	Variable	Variable - Assessment time inputs will be negotiated between the Parties at the time of Task Order issuance and fees will be determined based on the scope and complexity of the submitted documentation.
Acorn Design Document Review	~6h for initial screening and up to 2h for reviewing project responses after VVB process	Initial screening and feedback within 2-weeks of receiving documents from Plan Vivo	\$600

## 9. Services Delivery; Late Performance Penalty

With respect to the TRP Services delivered, if any Service is not completed by the due date, there will be 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.

The Parties acknowledge the importance of being flexible and adaptable to meet demand and take advantage of opportunities as they arise, so additional days can be considered and added if agreed upon by both parties.