

PLAN  VIVO

PV Nature

Terms of Reference

Approved Approach Review for Technical Review Panel

Version 1.1

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1 Introduction

Projects pursuing certification under the Plan Vivo Biodiversity Standard (PV Nature), must quantify biodiversity impact using the PV Nature Methodology¹. This allows for Plan Vivo Biodiversity Certificates (PVBCs) to be quantified, quality checked and assured. It sets minimum standards on biodiversity data quality and sampling protocols, and it defines the metrics via which biodiversity data is converted into numbers of PVBCs. Under the PV Nature Methodology, projects must collect and report data on a number of broad species groups, across a range of trophic levels (for example on birds, plants, amphibians, bats, and so on). It is not, for example, possible to issue certificates based on numbers of one iconic species or on simple measures like area of habitat, because these types of very simple indicators do not reliably represent ecosystem health.

Under the PV Nature Methodology, biodiversity must be quantified under five pillar metrics, which is then aggregated into a single multimetric. Each pillar represents a different, important aspect of biodiversity and captures quantifiable change as overall site-level biodiversity increases or decreases. While the pillars are of course interdependent, being linked by the data from which they are calculated, none are redundant. Each is sensitive to change in a different aspect of, and provides its own information about, the state of biodiversity, ecological function, and ecosystem health under different scenarios of change.

The objective of the PV Nature Methodology is to assess change over time in a subset of site-level biodiversity that represents the overall trend in the health of the ecosystem. The purpose is to obtain a robust measure of change in biodiversity over time, rather than (for example) to take a complete census of every living thing on a site, or to categorically prove the presence or absence of a particular species or group. Biodiversity trends give us an indication of the health of ecosystems within a site: as biodiversity improves, so do the functionality, productivity and overall health of the ecosystem.

The first three pillar metrics are based on the species data collected at a site, while the fourth and fifth pillar metrics are calculated from satellite data and habitat data (respectively) for terrestrial projects. The pillar metrics for marine projects, will follow the same approach, however, as defined in the PV Nature Methodology for terrestrial habitats, Pillars 4 and 5 will not be appropriate for

¹ <https://www.planvivo.org/projects/certify-a-project/pvnature/pv-nature-documents>

most marine habitats. Given the variability between different marine habitats, it may be more appropriate to use different metrics for different marine habitat types (e.g., metrics of habitat health or structural complexity that are specific to the changes seen in recovering coral reefs, kelp forests, hard bottom habitats, seagrass beds, etc.). As such, in the marine setting, a suitable Pillars 4 and 5 will most likely need to be ecosystem-specific.

Projects wanting to pursue certification under PV Nature must follow the PV Nature Methodology for quantifying and monitoring biodiversity. In marine ecosystems, where this is not possible due to the complexities of monitoring biodiversity in the marine environment, projects may propose an approach for specific marine ecosystems. Only in cases where an approved approach does not exist, a project may submit a proposed approach and follow a process of review and approval for proposed approaches.

2 Purpose

Before submission of a proposed approach, a presentation and/or written document outlining the proposed approach is presented to the PV Nature Marine Working Group (WG). Members of the WG then provide initial feedback on the approach to ensure alignment with the wider PV Nature Methodological Framework. Following the feedback, approval from the WG is reached before a screening process is then completed by Plan Vivo. This is led by the Secretariat with support from the Technical Advisory Committee (TAC) if necessary. The purpose of this screening is to ensure that the submission is complete and ready for the full review process.

After the screening, the Methodology undergoes a full review process. This is the stage where the proposed approach goes out for public consultation and two TRP members are convened and tasked with conducting a comprehensive review of a submitted proposed approach ([see Deliverables Section](#)).

This Terms of Reference (ToR) outlines the scope of work, composition, responsibilities, timeline, and compensation for the TRP member required for a review.

3 Objectives

The primary objectives for the TRP member are to ensure the validity and practical applicability, and overall compliance of the proposed approach submitted for approval under PV Nature.

For the proposed approach submitted for their initial approval, the TRP's objectives include:

- To conduct a thorough assessment to ensure the proposed approach's full compliance with PV Nature's Methodological Framework.
- To evaluate the scientific basis and methodological approach to confirm the validity and appropriateness for the intended application.
- To assess the proposed approach's clarity and completeness to ensure it can be practically applied at the Project level and in similar habitats globally.
- To provide a clear and justified recommendation to Plan Vivo for the proposed approach's approval via the Proposed Approach Review spreadsheet (Annex 2)

4 Scope of Work

The TRP member for this review will be selected by their specific relevance to the proposed approach. The assigned TRP member shall:

- Conduct a 1st round independent desk review of the submitted proposed approach content and raise any associated New Information Requests (NIRs) or Corrective Action Requests (CARs).
- Conduct a 2nd round desk review of the revised proposed approach based on revisions made by the project, ensuring all feedback has been adequately addressed.

5 Qualifications

To review a proposed approach, a TRP member must demonstrate expert knowledge of the procedures applied in the proposed approach. This can be evidenced by:

- Prior experience in developing or assessing similar approaches.
- Previous involvement in the development, or implementation of applying similar approaches.
- A track record of scientific research relevant to the scope of the proposed approach.

6 Review Process

6.1 Communication and Reporting

Upon their appointment, the selected TRP member must sign a Conflict of Interest Declaration. Any potential conflicts of interest must be declared immediately by the TRP member and may lead to their exclusion from the specific review.

Plan Vivo will provide the TRP member with relevant documentation and templates to facilitate their review and structure their feedback. All feedback and documentation will be shared between the TRP member and the project via Plan Vivo.

6.2 Review Stage

The TRP member shall conduct an independent, in-depth assessment of the submitted proposed approach (Annex 1). This assessment will be against the relevant criterion that fall under the PV Nature Methodological Framework and will be documented using Proposed Approach Template (Annex 2). The TRP member will conduct an iterative assessment providing two rounds of feedback, identifying and categorising any review findings into one of the following categories:

- Corrective Action Requests (CARs), which represent instances where:
- Criterion of the Methodological Framework have not been fulfilled.
- There is a risk that the specific habitat cannot be monitored by the proposed approach
- New Information Requests (NIRs), which indicate that:
- The provided information is insufficient or unclear, making it difficult to determine if criterion are met or whether references to other methodologies are appropriate.

The project is responsible for revising the proposed approach in response to the TRP member's review findings and relevant public consultation comments. The TRP member will then review the revised approach to confirm that all issues have been adequately addressed. Additional rounds of feedback or revision may occur if necessary until the TRP is satisfied that all NIRs and CARs are closed. If there are remaining CARs or NIRs unresolved after two rounds of feedback, the project must pay a new review fee for another round of feedback (if necessary), or the proposed approach may be rejected.

6.3 Report Approval Stage

Once all feedback has been closed, a recommendation is delivered to the WG about whether the approach has been approved by Plan Vivo. Finally, the proposed approach is presented to the WG

for final approval, before the proposed approach becomes an approved approach under PV Nature and will be officially published on the Plan Vivo website.

6.4 Disagreement Resolution

The TRP members shall aim for consensus in their assessments and recommendations. If a complete consensus cannot be reached after discussion and deliberation between the two TRP members, then the PV Nature Marine WG are consulted and a majority vote shall determine the final consensus of the raised topic.

6.5 Deliverables

The deliverables for the review process, and their expected timescales, are outlined in the table below.

Deliverable	Timeframe
Public Consultation Period	
The submitted proposed approach is published for a public consultation period to gather initial stakeholder feedback.	3 weeks
TRP Review & Initial Deliberation (Round 1)	
Two TRP members conduct concurrent desk review of the proposed approach against the Approved Approach Terms of Reference. Following this review, feedback is provided to the project, which is required to integrate and address all feedback received from the TRP members and the public consultation.	3 weeks or 4 with request
TRP Review of Project Revisions & Formulation of Further Feedback (Round 2)	
Assessing the project's responses to initial CARs/NIRs and any remaining public consultation comments. If all feedback has been closed, an opinion is delivered to the WG about whether the approach is approved.	2 weeks
WG Final Approval	
Final proposed approach is presented to the WG for approval before becoming an approved approach under PV Nature.	2 weeks

7 Compensation

A cost of £500 shall be paid to each TRP member for the review of the proposed approach.

8 Confidentiality

All information shared by Plan Vivo or in the proposed approach, including draft documents, comments, and discussions, is considered confidential. The TRP member is expected to treat this information with strict confidence and not share it externally without prior written permission from Plan Vivo.

9 Grievances

Plan Vivo has the 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, Plan Vivo may contact alternative experts to gather evidence as to the appropriateness of the grievance. In the instance that the grievance is substantiated, Plan Vivo will attempt to work with the TRP member to resolve the matter. Where this is deemed not possible, the TRP member's involvement in the review process will terminate and they will not be remunerated.

10 Conflicts of Interest

The TRP member must disclose any potential conflicts of interest that could affect their impartiality within the review process. The TRP member will be excluded from participation in the review of any proposed approach if they, or an organisation that employs them, have played any role in its development.

11 Contact Information

For any questions or to confirm participation, please contact:

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12 Annexes

12.1 Annex I – Approved Approach Review Process

The current review process for reviewing approved approaches has been modelled on the Plan Vivo Carbon Standard (PV Climate) V4, and is summarised as follows:

1. Assessment of alignment with wider PV Nature Methodological Framework
 - a. The proposed approach for a specific marine ecosystem is presented to the PV Nature Marine Working Group (WG) via a presentation and/or a written document.
 - b. Members of the Marine WG and Plan Vivo Secretariat provide initial feedback on the approach to ensure alignment with the wider PV Nature Methodological Framework.
 - c. Members of the Marine WG and Plan Vivo Secretariat provide approval for the proposed approach to be drafted and submitted to the PV Nature Technical Review Panel (TRP) for review.
2. Proposed Approach Methodology Review
 - a. The proposed approach is screened by the Plan Vivo Secretariat for completeness and to ensure all required information is available.
 - b. The proposed approach undergoes public consultation (3 weeks).
 - c. Concurrently, two members of the PV Nature TRP review the proposed approach against the approved approach Terms of Reference (ToR) (1st round review, up to 3 weeks or 4 with request).
3. Revision of the proposed approach
 - a. The project revises the proposed approach based on feedback from the public consultation and TRP review round 1.
 - b. The two members of the PV Nature TRP review the revised proposed approach for updates and assess whether feedback has been closed (2nd round review, up to 2 weeks). If all feedback has been closed, an opinion is delivered to the PV Nature Marine WG about whether it's approved.

- c. The final proposed approach is presented to the PV Nature Marine WG for final approval, before the proposed approach becomes an approved approach under PV Nature.

12.2 Annex II – Review Report Template

See attached Excel file for the Proposed Approach Review Report template to be used in your review.