

# Methodology Concept Note Review Terms of Reference for a Technical Review Panel (TRP) Member

Version 1.3  
10<sup>th</sup> April 2025

## 1. Introduction

*Projects* registered under the Plan Vivo Carbon Standard (PV Climate) can receive *Plan Vivo Certificates* (PVCs) that represent a past or future (depending on certificate type) reduction in GHG emissions or a removal of GHGs from the atmosphere as a result of *Project* activities<sup>1</sup>.

The latest version of the Standard (V5) requires that *Projects* apply approved *Methodologies* to quantify their emission reductions and removals (or '*Carbon Benefits*')<sup>2</sup>. *Methodologies* under Plan Vivo may be either one of the following:

- **Stand-alone** – A single document that includes all information necessary to meet the Methodology Requirements without referring to other methodological elements.
- **Modular** – A methodology that refers to other methodological elements, whether internal or external to Plan Vivo, to meet the Methodology Requirements.

Under PV Climate, methodological elements can either be *Modules* or *Tools*, in which:

- **Module** – A methodological element that describes the procedures, data, and parameters needed to estimate one or more parameter values in an approved *Methodology*.
- **Tool** – A methodological element that describes the procedures for performing specific analysis applied in an approved *Methodology* or *Module*.

Whilst stand-alone *Methodologies* are simpler for a *Project* to apply, modular *Methodologies* can be advantageous in minimising the proliferation of methodological elements. This reduces the risk of errors or inconsistencies across *Methodologies* and eases the ability to update them to maintain best practice.

Prior to submitting a *Methodology* or methodological element for review, these must first undergo a methodology concept note review. A flowchart illustrating this process and the parties involved is provided in Annex 1.

## 2. Scope of work

The role of the TRP Member is to evaluate the appropriateness of the proposed *Methodology*, *Module*, or *Tool* by using the Methodology Concept Note Review Report and the accompanying feedback spreadsheet provided in Annex 2 to ensure that:

1. The Methodology Concept Note meets the basic eligibility criteria.
2. The proposed *Methodology*, *Module*, or *Tool* is expected to comply with the PV Climate Methodology Requirements.

Throughout all stages of the review process, all feedback and documentation will be shared between the TRP Member and the *Methodology* developer through the Plan Vivo Foundation. This process will maintain the anonymity of the TRP Member, unless anonymity is waived at their discretion.

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<sup>1</sup> <https://www.planvivo.org/Pages/Category/projects?Take=28>

<sup>2</sup> <https://www.planvivo.org/pv-climate-methodologies>

### 3. Review Process

#### 3.1. Communication and Reporting

Relevant documentation and templates will be provided to the TRP Member to facilitate their review and to structure their feedback. The TRP Member should first read the Methodology Concept Note Review Report template to understand the assessment criteria for the methodology concept note and the information required during the Review Report Writing stage (see Section 3.3). It is not necessary to complete the review report template at this stage.

All feedback and documentation will be shared between the TRP Member and the *Methodology* developer through the Plan Vivo Foundation. This arrangement ensures the anonymity of the TRP Member. However, anonymity may be waived at the TRP Member's discretion if they choose to discuss feedback directly with the *Methodology* developer.

#### 3.2. Iterative Feedback Stage

Using the supporting feedback spreadsheet 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 Methodology Requirements has not been fulfilled;
  - There is a risk that *Carbon Benefits* cannot be monitored or calculated;
  - There is an inappropriate link to, or reference to, another *Methodology*;
  - There is duplication of, or overlap with, approved *Methodologies* or sections thereof.
- **New information requests** (NIRs), which indicate that:
  - The provided information is insufficient or unclear, making it difficult to determine if the Methodology Requirements are met or whether references to other *Methodologies*, *Modules*, or *Tools* are appropriate.
- **Forward action requests** (FARs), applicable only at the concept note stage, indicate that:
  - A CAR or NIR that does not need to be addressed at the concept note stage, but must be addressed at the time of *Methodology* submission.

Once the TRP Member provides feedback, the *Methodology* developer can update their methodology concept note and respond to any issues raised in the Feedback Spreadsheet. This process can continue until all CARs and NIRs are resolved. If any CARs or NIRs remain unresolved after three rounds of feedback, the *Methodology* developer must pay a new review fee for an additional three rounds of feedback, or the Methodology Review Report will be completed stating that the methodology concept note has been rejected.

#### 3.3. Review Report Writing Stage

After all CARs and NIRs have been resolved, or after three rounds of feedback have been provided, the TRP Member should complete the Methodology Concept Note Review Report. This report aims to summarise the findings of the TRP Member, the final status of the methodology concept note (accepted or rejected), and provide an estimate of the cost for a TRP review if the full *Methodology*, *Module*, or *Tool* is submitted.

### 4. Qualifications

To review a methodology concept note the TRP Member must have:

- **Expert knowledge of the procedures applied in the *Methodology, Module or Tool* –** demonstrated by: i) having previously developed or assessed similar *Methodologies*; ii) previous involvement in the development, implementation, or *Validation/Verification* of *Projects* applying similar *Methodologies*; iii) a track record of scientific research relevant to the full scope of the *Methodology, Module or Tool*.

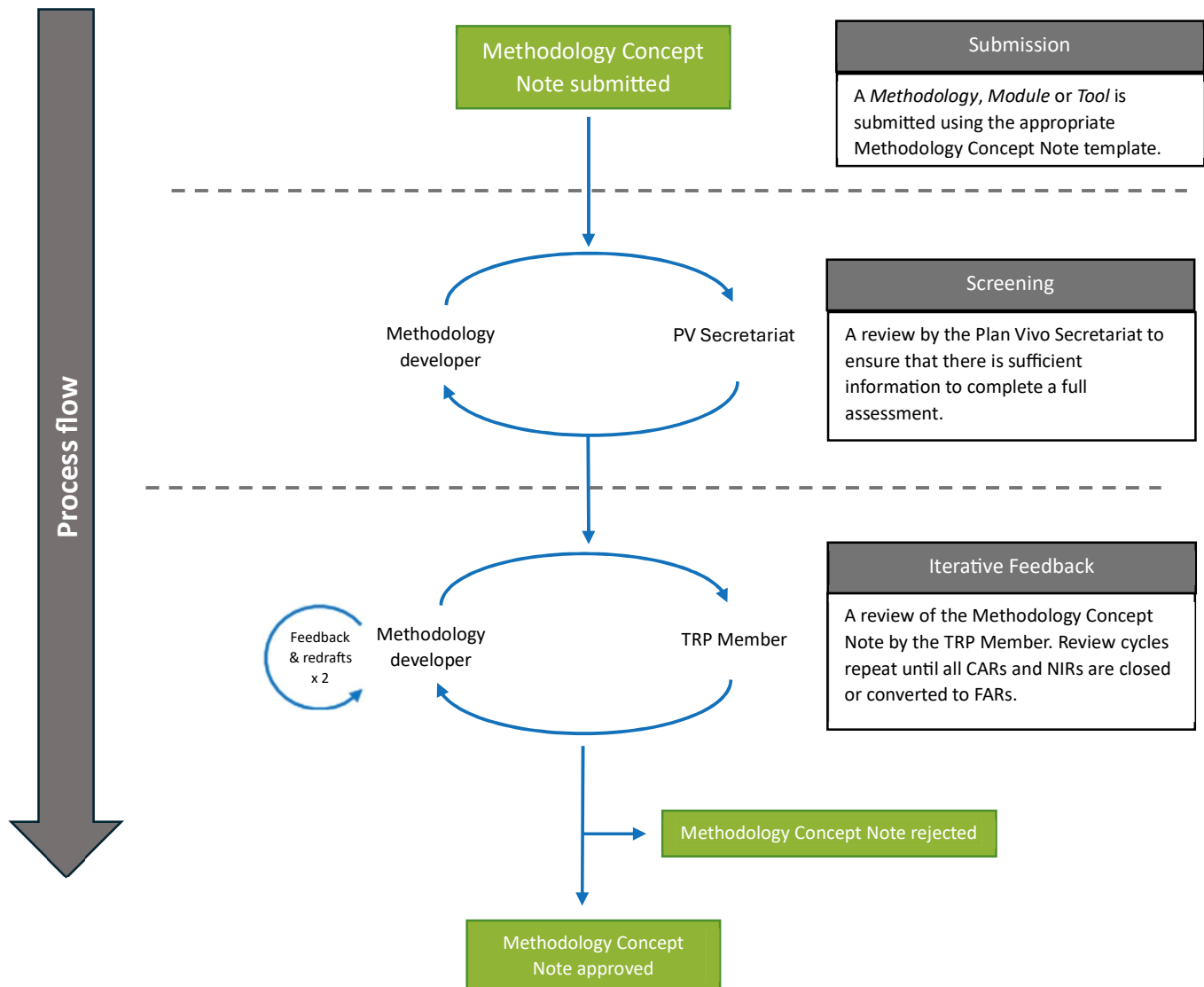
## 5. Grievances

The Plan Vivo Foundation has 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 Foundation 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 Foundation 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.

## 6. Conflicts of interest

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

## Annex 1 – Methodology Concept Note review process flowchart



## Annex 2 – Methodology Concept Note Review Report

Please see the accompanying documents.