

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

Version 1.3
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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* activities¹.

The latest version of the Standard (V5) requires that *Projects* apply approved *Methodologies* to quantify their emission reductions and removals (or 'Carbon Benefits')². *Methodologies* under PV Climate 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.

Each *Methodology*, *Module*, and *Tool* must undergo a *Methodology* review process. A flowchart illustrating this process and parties involved is provided in Annex 1.

2. Scope of work

The role of the TRP Member is to review the appropriateness of the *Methodology*, *Module* or *Tool*. The TRP Member must use the Methodology Review Report provided in Annex 2 to ensure that:

1. The *Methodology*, *Module*, or *Tool* is compliant with the PV Climate Methodology Requirements³ that are deemed relevant to the scope of the *Methodology*, *Module* or *Tool*; and
2. There is justification for any duplicate elements of already-approved *Methodologies*, *Modules* or *Tools*, which the Plan Vivo Foundation has prior agreed upon.

To achieve this, the TRP Member will lead two review stages (see Annex 1 for an illustration of all stages).

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

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

³ <https://www.planvivo.org/pv-climate-documentation>

3. Review Process

3.1. Communication and Reporting

Relevant documentation and templates will be provided to the TRP Member to enable their review and to structure their feedback. All feedback and documentation will be shared between the TRP Member and *Methodology* developer through the Plan Vivo Foundation, thereby allowing anonymity for the TRP Member. Anonymity may be waived, at the discretion of the TRP Member, to discuss feedback directly with the *Methodology* developer.

3.2. Plan Vivo Review Stage

Using the Methodology Review Report, the TRP Member should conduct an iterative assessment of the submitted *Methodology*, *Module*, or *Tool*, identifying and categorising any review findings into one of 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.

After receiving feedback from the TRP Member, the *Methodology* developer will be able to update their *Methodology*, *Module* or *Tool* and respond to any feedback raised. All CARs and NIRs must be closed before the *Methodology*, *Module* or *Tool* can pass the Plan Vivo Review stage. If there are remaining CARs or NIRs unresolved after three rounds of feedback, the *Methodology* developer must pay a new review fee for another three rounds of feedback, or the *Methodology*, *Module* or *Tool* must be rejected.

3.3. Report Approval Stage

After the *Validation and Verification Body* (VVB) has reviewed the *Methodology*, *Module* or *Tool* and provided a report suggesting that it should be approved, the TRP Member should assess the report and latest draft of the *Methodology*, *Module* or *Tool* and indicate whether they agree or disagree with the findings and changes made.

If there are any disagreements, the TRP Member shall engage in dialogue with the VVB until they come to a mutual agreement. If a mutual agreement cannot be found, then the Plan Vivo Foundation may seek further expertise for advice. If the VVB rejects the methodology, then this phase will not occur.

4. Qualifications

To review a *Methodology*, *Module* or *Tool*, 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*.

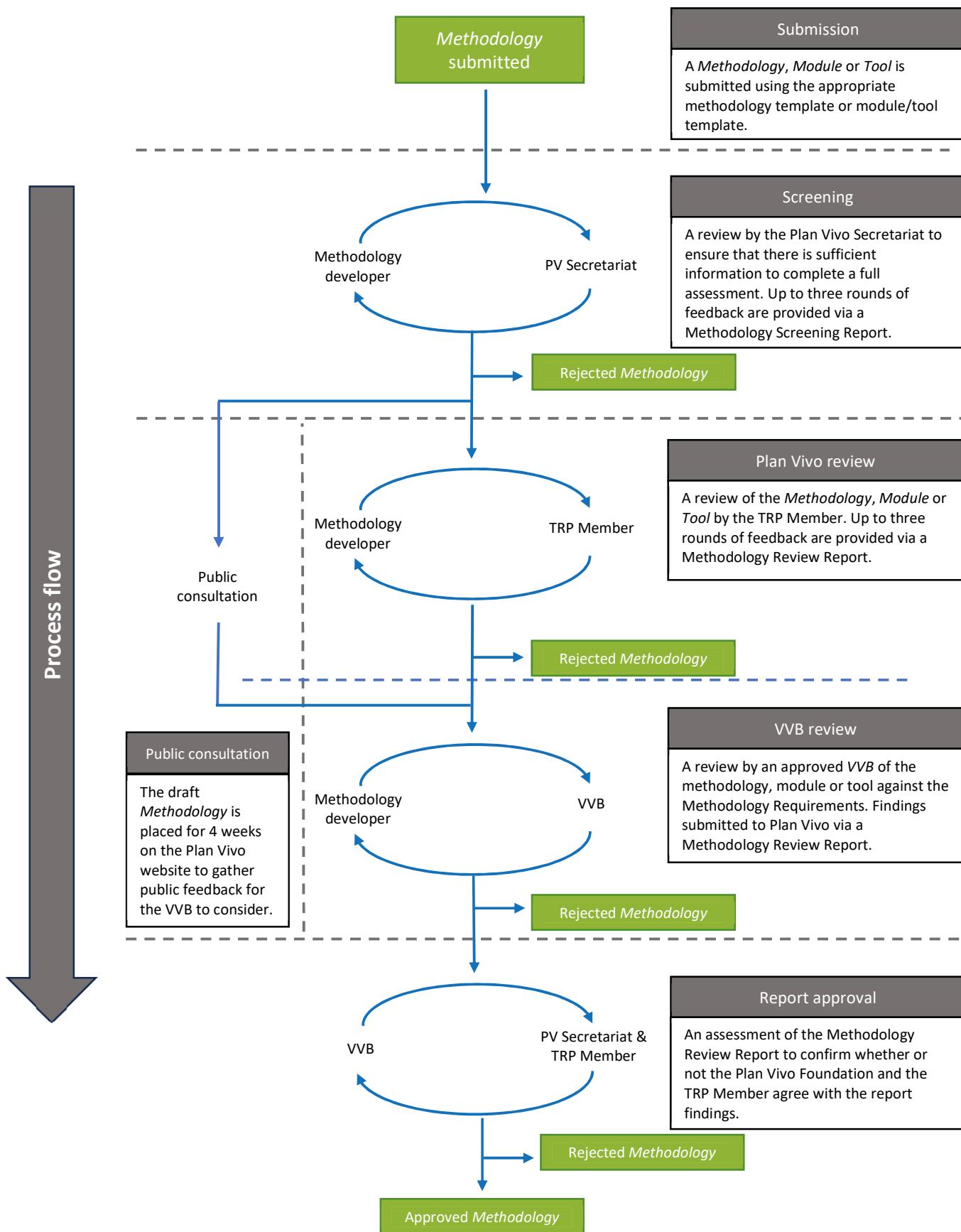
5. Grievances

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 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 review process flowchart



Annex 2 – Methodology review report

Please see the accompanying excel file.