

Microscale Project Design Document (PDD) Review Terms of Reference for a Technical Review Panel (TRP) Member

Version 1.2
10th 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 the certificate type) reduction in GHG emissions or a removal of GHGs from the atmosphere as a result of *Project* activities¹.

The latest version of PV Climate (V5) allows *Projects* to take one of two different *Validation* and *Verification* routes depending on the scale of the *Project*:

- **Microscale Projects** (those generating *Carbon Benefits* of less than 10,000 t CO₂e per year) may opt to contract *Independent Experts (IEs)* to conduct site visits, with the Plan Vivo Foundation overseeing the overall *Validation* and *Verification* processes.
- **Macroscale Projects** (those generating *Carbon Benefits* of more than 10,000 t CO₂e per year) will have to contract a *Validation and Verification Body (VVB)* from the list of Plan Vivo-approved *VVBs* to conduct *Validation* and *Verification* activities.

To become *Certified* against PV Climate, a *Project* must submit a *Project Design Document (PDD)* that describes all elements of its design, including the *Carbon Benefits* the *Project* will achieve from its interventions. To estimate this, a *Project* must apply a PV Climate-approved *Methodology*².

To ensure that best practice is followed, a *Project*'s application of an approved *Methodology*, as outlined in the *Technical Specifications* of the *PDD*, must be reviewed by the Plan Vivo Technical Review Panel (TRP). The depth of review differs depending on whether a *Project* is *Microscale* or *Macroscale*. A flowchart illustrating the *Microscale Validation* process and the parties involved are provided in Annex 1.

2. Scope of work

The role of the TRP Member is to review the appropriateness of the *Technical Specifications*. The TRP Member must use the *PDD Review Report* provided in Annex 2 to ensure that:

1. The *Technical Specifications* are compliant with the PV Climate Project Requirements; and
2. The *PDD* follows and has correctly applied the procedures in an approved PV Climate *Methodology*.

To achieve this, the TRP Member will provide three rounds of technical feedback for *Microscale Projects* (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).

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 *Project Coordinator* through the Plan Vivo Foundation, thereby allowing anonymity for

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

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

the TRP Member. Anonymity may be waived, at the discretion of the TRP Member, to discuss feedback directly with the *Project Coordinator*.

3.2. Plan Vivo Review Stage

Using the *PDD* Review Report, the TRP Member should conduct an iterative assessment of the *PDD*, identifying and categorising any areas of non-compliance between the *Technical Specifications* and the Project Requirements. The non-compliance can be classified 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 chosen *Methodology* resulting in a deviation between the measured/modelled and actual *Carbon 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 *IE*.

After receiving feedback from the TRP Member, the *Project Coordinator* will be able to update their *PDD* and respond to any feedback raised. All CARs and NIRs must be closed or converted to FARs before the *Project* can pass the Plan Vivo Review stage.

3.3. Report Approval Stage

After the Plan Vivo Foundation has reviewed the *PDD* through the support of an *IE* and provided a Validation Report suggesting it should be approved, the TRP Member should evaluate the latest draft of the *Technical Specifications* and indicate whether they agree or disagree with the findings and changes made.

A *Project* cannot register if any CARs or NIRs from the Validation Report remain open, or if more than 3 FARs have been issued in the *Validation* findings.

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; 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 and/or similar environmental and social context; or ii) 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: i) previous involvement in the development, implementation, evaluation or validation/verification of *Projects* applying the same (or very

similar) *Methodologies*; ii) contributions to the development of similar *Methodologies*; or iii) completion of specific training relating to the application of the *Methodologies*.

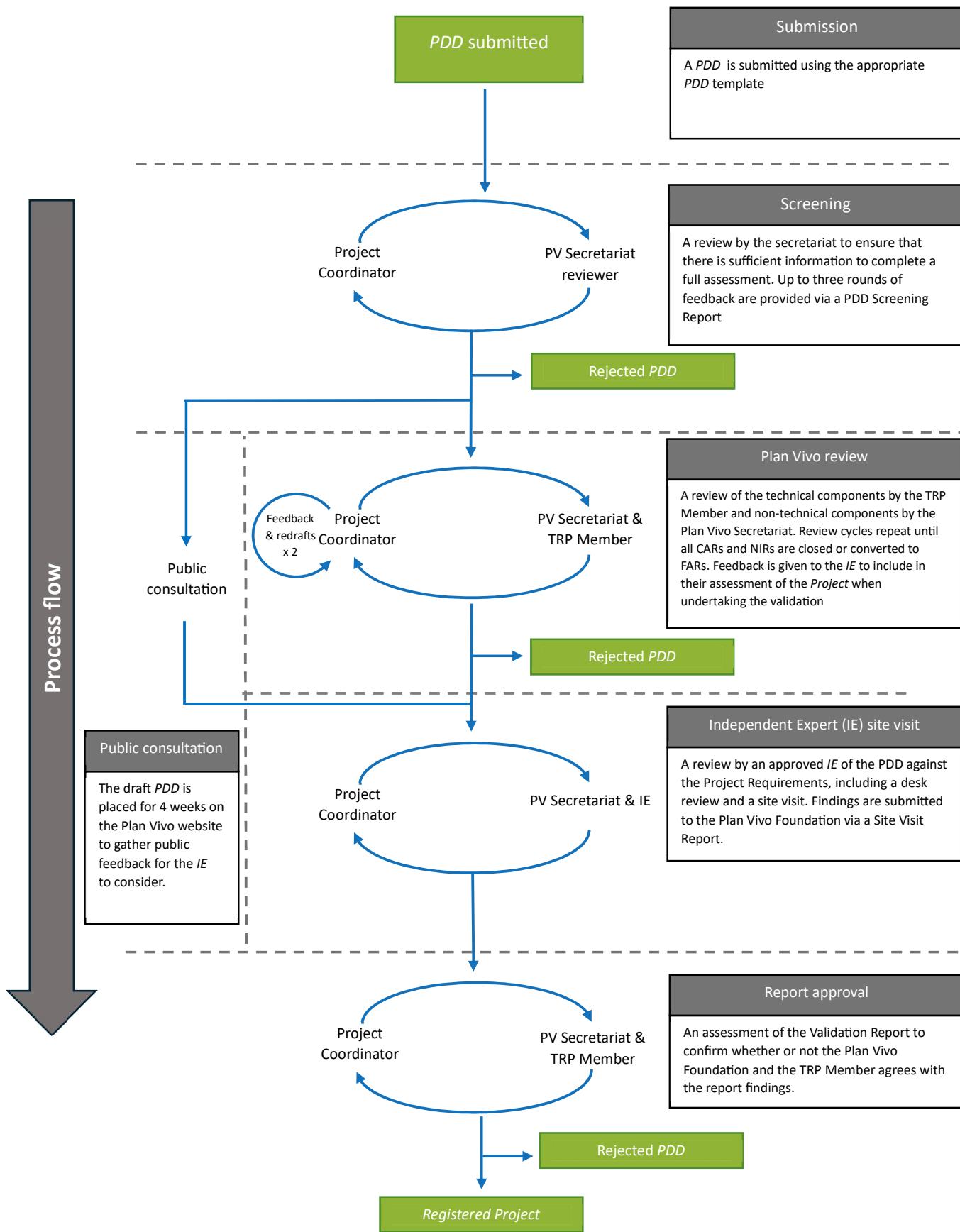
5. Grievances

The Plan Vivo Foundation 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 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 *Project* if they, or an organisation that employs them, have played any role in its development.

Annex 1 – Microscale review process flowchart



Annex 2 – PDD Review Report

Please see the accompanying Excel file.