

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

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

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 practices are followed, a *Project's* application of an approved *Methodology* must be reviewed by the Plan Vivo Technical Review Panel (TRP). Some TRP reviews will be assessed by a nominated TRP Member through a peer-review process to guarantee the quality of reviews by TRP Members.

TRP Members who have demonstrated competence in the application of the *Methodology* used by the *Project*, as evidenced by past reviews of *Technical Specifications* using the same *Methodology*, are eligible to serve as peer reviewers. A flowchart illustrating the peer review process and the parties involved is provided in Annex 1.

2. Scope of work

The role of the TRP Member (hereafter referred to as the peer reviewer) is to review the appropriateness of the *Technical Specifications*, clearly identify any important errors or omissions in the Review Report of the other TRP Member (hereafter referred to as the lead reviewer), and report any conflicting findings. The peer reviewer should first read the submitted *PDD* to understand the information required for their review and what they should be assessing the lead reviewer's PDD Review Report against. After which, they must use the Peer Review Report template provided in Annex 3 to ensure that:

1. The *Technical Specifications* are compliant with the PV Climate Project Requirements
2. The *PDD* follows and has correctly applied the procedures in an approved PV Climate *Methodology*; and
3. The lead reviewer has undertaken a full, comprehensive, and accurate assessment of points 1 and 2

To achieve this, both the peer reviewer and lead reviewer will review the *PDD* as per the:

- Microscale Project Design Document Review Terms of Reference: if the *Project* is *Microscale* i.e. generating *Carbon Benefits* of less than 10,000 t CO₂e per year (See Annex 4); or
- Macroscale Project Design Document Review Terms of Reference: if the *Project* is *Macroscale* i.e. generating *Carbon Benefits* of more than 10,000 t CO₂e per year (see Annex 5)

The relevant sections of the *PDD* which fall within the scope of the peer review are outlined in the Peer Review Report (see Annex 3).

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

² <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 enable their review and to structure their feedback.

3.2 Peer Review Stage

The peer reviewer should start by conducting an initial review of the *PDD* using the PDD Review Report provided in Annex 2. This process must adhere to Section 3.2 of either the Microscale PDD Review Terms of Reference (found in Annex 4) or the Macroscale PDD Review Terms of Reference (found in Annex 5), depending on the *Project's* scale.

After receiving feedback from the lead reviewer, the peer reviewer should transfer both sets of findings to the Peer Review Report found in Annex 3 and respond to the lead reviewer's comments accordingly. Feedback can be provided in the following forms:

- Partial differences, which represent:
 - The information given is insufficient or not clear enough to determine whether the lead reviewer has sufficiently assessed the application of the *Methodology* and compliance with the Project Requirements.
- Minor differences, which represent:
 - A small deviation between the lead reviewer and peer reviewer's feedback in which improvements are recommended, but comments are generally of acceptable quality.
- Major differences, which represent:
 - A significant deviation between the lead reviewer and peer reviewer's feedback that needs to be addressed before the Review Report can be returned to the *Project Coordinator*.

After completing their review, the peer reviewer should then organise a call with the lead reviewer to discuss both sets of findings. If the peer reviewer has raised no more than three minor differences and both reviewers agree to send the feedback to the *Project Coordinator*, subsequent feedback rounds may be completed without the involvement of the peer reviewer. However, unless stated otherwise, the peer reviewer will have the final decision on Corrective Action Requests (CARs) and New Information Requests (NIRs) submitted to the *Project Coordinator*.

In cases where there is disagreement between reviewers regarding a particular aspect of the *Project* about its compliance with the PV Climate or ACORN programmes, the Plan Vivo Foundation will facilitate discussion between TRP Members to try and reach an agreement. If opinions cannot be aligned, the Plan Vivo Foundation will seek further expert views on the issue and make a final decision based on a reasonable assessment of the evidence and views.

3.3 Peer Evaluation Stage

Once a *PDD* has passed the peer review stage, the peer reviewer must evaluate the performance of the lead reviewer, considering the overall quality, quantity, format, and accuracy of the feedback that the lead reviewer was able to provide without support. This evaluation will help inform the Plan Vivo Foundation as to whether the lead reviewer is capable of carrying out subsequent reviews independently. To qualify for independent reviews, lead reviewers must meet the minimum requirements below:

- No more than 3 partial differences can be issued

- No more than 3 minor differences can be issued
- No more than 1 major difference can be issued

The peer reviewer should provide feedback to the Plan Vivo Foundation via email regarding the overall quality of the lead reviewer and make recommendations on whether further peer reviews or training in specific areas are needed before the lead reviewer can conduct reviews independently with confidence.

4. Qualifications

To peer review *Project* documentation, TRP Members 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*.
- **Passed the peer review process to become an approved reviewer –** demonstrated by competence in the application of the *Methodology* used by the given *Project*, as evidenced by past reviews of *Technical Specifications* using the same *Methodology*

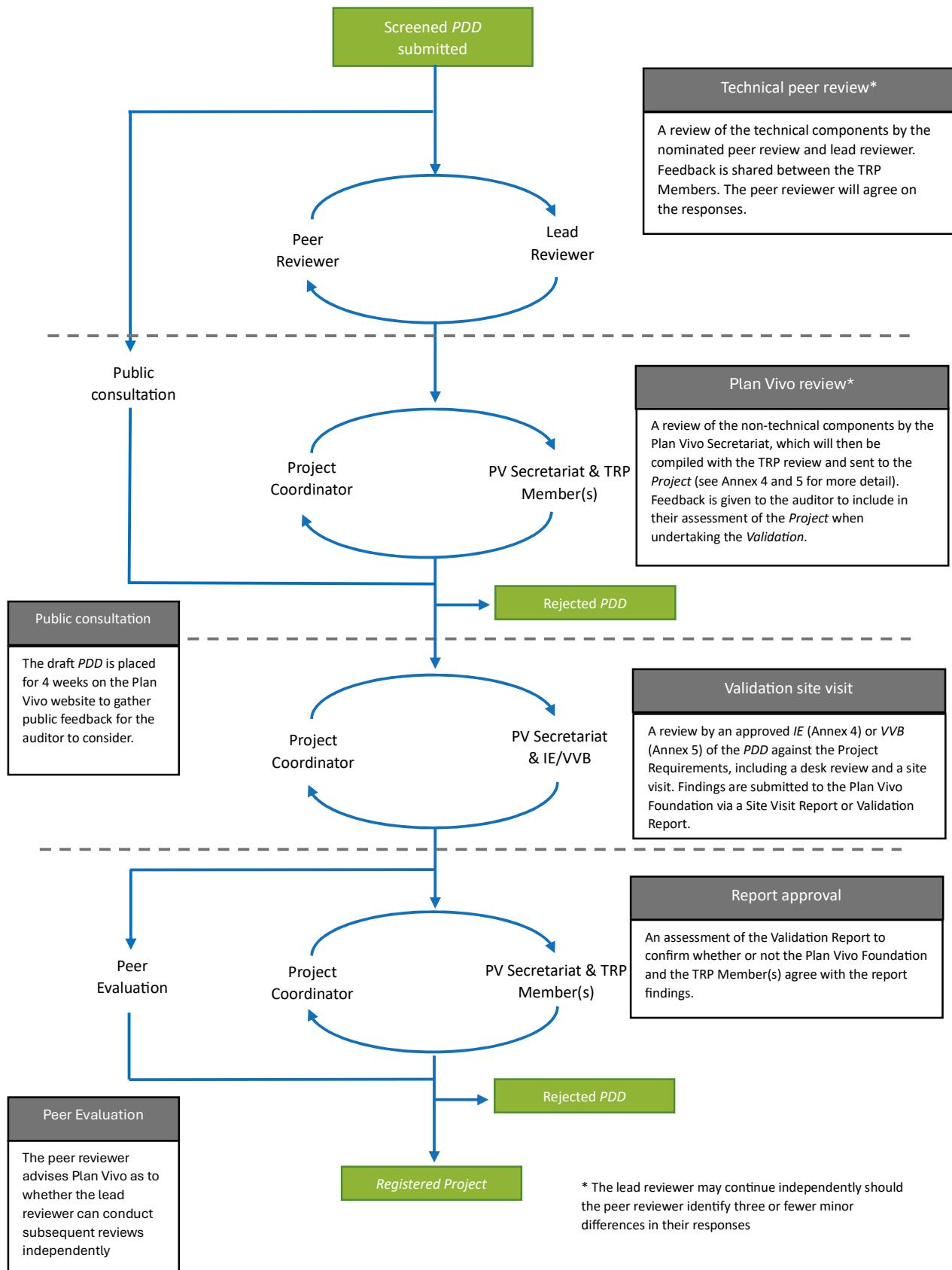
5. Grievances

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 peer reviewer 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 peer review process. TRP Members will be excluded from participation in the peer review of any *Project* if they, or an organisation that employs them, have played any role in its development.

Annex 1 – Peer review process flowchart



Annex 2 – PDD Review Report

Please see the accompanying excel file.

Annex 3 – Peer Review Report

Please see the accompanying excel file.

Annex 4 – Microscale Project Design Document Review

Terms of Reference

Please see attached.

Annex 5 – Macroscale Project Design Document Review

Terms of Reference

Please see attached.