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SD VISta Methodology Element Assessment Report Template

This template is for the assessment of new methodologies, modules and tools, and revisions of such methodology elements.

Instructions for Completing the Methodology Element Assessment Report

TITLE PAGE: Complete all items in the box on the title page using Arial or Century Gothic 10.5 point, black, regular (non-italic) font. This box must appear on the title page of the final document. Methodology assessment may also feature the preparers’ name, logo and contact information more prominently on the title page, using the format below (Arial or Century Gothic 24 point and Arial or Century Gothic 12 point, black, regular font).

METHODOLOGY ELEMENT ASSESSMENT REPORT: Instructions for completing the methodology element assessment report are given under the section headings in this template. All instructions must be followed, as set out in the *SD VISta Program Guide*. Many of the instructions relate back to the rules and requirements set out in the *SD VISta Program Guide* and accompanying SD VISta Program documents. As such, this template must be completed paying attention to the rules and requirements set out in such documents, and the validation/verification body will need to refer to the SD VISta Program documents in order to complete the template. Note that the instructions in this template are intended to serve as a guide and do not necessarily represent an exhaustive list of the information the validation/verification body should provide under each section of the template.

Note that in the instructions in this template the term methodology has been used in lieu of methodology element for ease of readability.

All sections must be completed Arial or Century Gothic 10.5 point, black, regular (non-italic) font. Where a section is not applicable, same must be stated under the section (the section must not be deleted from the final document).

Delete all instructions, including this introductory text, from the final document

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Methodology Element Assessment Report Title

Logo (optional)

Document Prepared by (individual or entity)

Contact Information (optional)

|  |  |
| --- | --- |
| Methodology Title | *Name of this methodology* |
| Version | *Version number of this methodology* |
| Methodology Category | *Methodology* |
| *Methodology Revision* |
| *Module* |
| *Tool* |
| Sectoral Scope(s) | *Sectoral scope(s) applicable to this methodology* |
| Associated Sustainable Development Goal | *Indicate the Sustainable Development Goal(s) that projects using the methodology will contribute towards* |
| Report Title | *Title of this assessment report* |
| Report Version | *Version number of this assessment report* |
| Client | *Client for whom this report is prepared* |
| Pages | *Number of pages of this report* |
| Date of Issue | *DD-Month-YYYY this report issued* |
| Prepared By | *Validation/verification body that prepared this report* |
| Contact | *Physical address, telephone, email, website* |
| Approved By | *Individual at the validation/verification body who approved this assessment report* |
| Work Carried Out By | *Individuals who conducted this assessment, including their titles* |
| **Summary** | |
| *Provide a brief summary of the following:*   * *A brief description of the assessment and the methodology* * *The purpose and scope of the assessment* * *The method and criteria used for the assessment* * *The number of findings raised during the assessment* * *Any uncertainties associated with the assessment* * *Summary of the assessment conclusion (include the version number of the final version of the methodology)* | |

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# Introduction

## Objective

*Explain the purpose of the assessment.*

## Summary Description of the Methodology

*Provide a brief summary description of the methodology describing the project activities that are covered by the methodology (no more than one page).*

# Assessment Approach

## Method and Criteria

*Describe the methods and criteria used for undertaking the assessment, including the SD VISta Program documentation that was used as the criteria for the assessment.*

## Document Review

*List all documents that were reviewed during the assessment. Do not include SD VISta Program documents (which must be listed in Section 2.1 above).*

## Interviews

*Describe the interview process and list the individuals interviewed for the assessment, Include the roles and organizational affiliations of such individuals interviewed.*

## Assessment Team

*List the names and roles of all members of the assessment team and provide a summary of the qualifications of each team member, including a description of their expertise and experience in the sectoral scope(s) relevant to the methodology.*

*Where applicable, state the name of the SD VISta Program-approved expert and their role in the assessment.*

## Resolution of Findings

*Describe the process for the resolution of findings (corrective actions, clarifications or other findings) raised by the assessment team during the assessment process.*

*State the total number of corrective action requests, clarification requests or other findings raised during the assessment.*

*Provide a brief summary of the main findings and/or points of discussion with the methodology developer, and how the methodology was revised in response to them. Include only the main issues (and do not put this summary in an appendix).*

*Provide, in an appendix, a summary of each finding, including the issue raised, the response(s) provided by the developer, and the final conclusion and any resulting changes to methodology.*

# Assessment Findings

*Use this section to describe the assessment process and conclusions for key sections of the methodology. Validation/verification bodies must ensure that the principles set out in the Sustainable Development Verified Impact Standard and SD VISta Program Guide are adhered to in methodologies. Likewise, validation/verification bodies should consider how methodological approaches are consistent with best practice and scientific consensus.*

*Where the methodology references modules or tools approved under the SD VISta Program, assess whether and how the modules or tools are used appropriately within the methodology. Reassessment of the actual modules or tools is not required.*

## Relationship to Approved or Pending Methodologies

*Identify each similar methodology (approved or pending) under the SD VISta Program. Assess whether the methodology provides a complete list of all such similar methodologies.*

*Assess whether the similar methodologies could have reasonably been revised to meet the objective of the new methodology, and provide an overall conclusion regarding the justification for the new methodology. Include an explanation of how none of the identified methodologies could have reasonably been revised to meet the objective of the new methodology*

## Stakeholder Comments

*Identify any comments submitted under the public stakeholder consultation. Assess whether the developer has taken due account of comments and provide an overall conclusion regarding stakeholder comments.*

*Include the developer’s response to each comment and describe any resultant changes to the methodology and an explanation of how this is appropriate.*

## Structure and Clarity of Methodology

*Assess whether the methodology is written in a clear, logical, concise, and precise manner. Include an explanation regarding each of the following:*

* *Whether the developer has followed the instructions in the methodology template and ensured that the methodology’s various criteria and procedures are documented in the appropriate sections of the template.*
* *Whether the terminology used in the methodology is consistent with that used in the SD VISta Program.*
* *Whether the key words must, should and may have been used appropriately and consistently to denote firm requirements, (non-mandatory) recommendations and permissible or allowable options, respectively.*
* *Whether the criteria and procedures are written in a manner that can be understood and applied readily and consistently by project proponents.*
* *Whether the criteria and procedures are written in a manner that allows projects to be unambiguously audited against them.*

*Provide an overall conclusion regarding the structure and clarity of the methodology.*

## Definitions

*Assess whether all key terms are defined clearly and appropriately, and are consistently used in the methodology. Provide an overall conclusion regarding the definition of key terms in the methodology. Terms must be listed in alphabetical order, and terms already defined under the SD VISta Program must not be repeated in the methodology. The Definitions section may also include a list of the key acronyms used in the methodology.*

## Applicability Conditions

*Identify the applicability conditions. Assess whether they are appropriate for the project activities targeted by the methodology and the quantification procedures set out within the methodology, and provide an overall conclusion regarding the specification of the applicability conditions.*

*Include an explanation of how the applicability conditions as a whole are sufficiently clear for determining which project activities are eligible under the methodology and which are not.*

*Include an explanation of how the applicability conditions address environmental integrity and practical considerations (e.g., where the methodology uses field studies to demonstrate the impacts of an intervention, the applicability conditions would need to ensure application of the methodology is restricted to regions for which field studies have been carried out)*

*Separately for each applicability condition, also explain whether:*

* *The applicability condition is written in a sufficiently clear and precise manner, such that it can be determined whether a project activity meets with the condition.*
* *Conformance with the applicability condition can be demonstrated at the time of project validation, noting that projects should not be able to fall out of line with applicability conditions.*

## Project Boundary

*Identify the project boundary. Assess whether the approach for identifying the project boundary is appropriate for the project activities covered by the methodology, and provide an overall conclusion regarding the specification of the project boundary.*

*Include an explanation of how the included and optional impacts are appropriate to the project activities covered by the methodology. Likewise, for excluded impacts, explain how their exclusion is appropriate. Address each impact separately.*

*Include an explanation of how any procedures and/or diagrams provided for the project boundary are clearly specified and appropriate to the project activities covered by the methodology.*

## Baseline Scenario

*Identify the criteria and procedures for determining the baseline scenario. Assess whether this is appropriate for the project activities covered by the methodology, and p*rovide an overall conclusion regarding the criteria and procedures for determining the baseline scenario*.*

Include an explanation of how the criteria and procedures for identifying alternative baseline scenarios and determining the most plausible scenario can be expected to result in a baseline scenario that reasonably represents the conditions and outcomes in the absence of the project activity.

## Additionality

*Where the methodology may not be used for offsetting, and the developers chose not to include a demonstration of additionality, indicate that this section is not applicable. Otherwise, use the instructions below.*

*Identify the criteria and procedures for determining additionality. Assess whether they are appropriate for the project activities covered by the methodology, and provide an overall conclusion regarding the criteria and procedures for determining additionality.*

## Quantification of Sustainable Development Impacts

### Baseline Impacts

*Identify the procedures for the quantification of the sustainable development impact for the baseline scenario. Assess whether they are appropriate for the project activities covered by the methodology, and provide an overall conclusion regarding the procedures for quntifiying the sustainable development impact for the baseline scenario.*

*Include an explanation of whether and how:*

* *The procedures for quntifiying the sustainable development impact for the baseline scenario* cover all spheres of influence included in the project boundary (including any optional spheres).
* *All algorithms, equations and formulas used are appropriate and without error.*
* *All models or default factors used are appropriate and in conformance with SD VISta Program requirements on same.*
* *The procedures for estimating parameters related to the quantification of the sustainable development impact for the baseline scenario are appropriate.*

### Project Impacts

*Identify the procedures for the quantification of the sustainable development impact for the project scenario. Assess whether they are appropriate for the project activities covered by the methodology, and provide an overall conclusion regarding the procedures for quantifying the sustainable development impact for the project scenario.*

*Include an explanation of whether and how:*

* *The procedures for quntifiying the sustainable development impact for the project scenario* cover all spheres of influence included in the project boundary (including any optional spheres).
* The procedures *for quntifiying the sustainable development impact for the project scenario include the positive and negative, direct and indirect impacts.*
* *All algorithms, equations and formulas used are appropriate and without error.*
* *All models or default factors used are appropriate and in conformance with SD VISta Program requirements on same.*
* *The procedures for estimating parameters related to the quantification of the sustainable development impact for the project scenario are appropriate.*

### Net Sustainable Dvelopemnt Impacts

*Identify the procedures for the quantification of the sustaibable development impacts. Assess whether they are appropriate for the project activities covered by the methodology, and provide an overall conclusion regarding procedures for quantifying the net sustaibable development impacts.*

*Include an explanation of whether and how:*

* *All algorithms, equations and formulas used are appropriate and without error.*
* Any uncertainties associated with the quantification of sustainable development impacts are addressed appropriately.

## Monitoring

*Identify the data, parameters and procedures for monitoring. Assess whether they are appropriate for the project activities covered by the methodology, and provide an overall conclusion regarding the data, parameters and procedures for monitoring.*

*Separately for each data/parameter available at validation, include an explanation of how the following are appropriate: data unit, source of data, value applied, justification of choice of data or description of measurement methods and procedures applied, and purpose of data.*

*Separately for each data/parameter monitored, include an explanation of how the following are appropriate: data unit, source of data, value applied, justification of choice of data or description of measurement methods and procedures applied, and purpose of data.*

*Include an explanation of how the monitoring plan ensures that the sustainable development impacts are monitored and reported appropriately.*

# Assessment Conclusion

*Clearly state whether the methodology complies with the assessment criteria, including any qualifications or limitations. Include the version number and issue date of the methodology.*

*Where the methodology has been revised as a result of subsequent assessment or review, update this assessment conclusion with the version number and issue date of the methodology version finally being approved by the validation/verification body.*

# Assessment Team Qualifications

*Provide a list of the members of the technical assessment team* *including their role and a summary description of the qualifications of each member of the team indicating their expertise and experience in the sectoral scope(s) relevant to the methodology.*

# Signature

Signed for and on behalf of:

Name of entity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of signatory: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Appendix I: Findings

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