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GUIDELINES

Livelihood Matrix Guidelines

SUMMARY

This document is designed to support Developers in the understanding and filling of the [Livelihood Matrix](#). It highlights the need for Free, Prior and Informed Consent, as outlined in the [ERS Programme](#), to be applied throughout the Project, distinguishes which information must be obtained during the Project Feasibility and Project Design phases, guides Developers on how to determine the baseline of each dimension: Livelihood, Employment & Fair Wages, and Cultural Heritage & Governance, and on how to determine a [Social Additionality Plan](#).



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NORMATIVE REFERENCES

This document must be read in conjunction with the following documents:

- [ERS Programme](#)
- [Community Consultation Guidelines](#)

TEMPLATES

This document is linked with the following templates:

- [Livelihood Matrix](#)
- [Social Additionality Plan](#)



Project Feasibility *Phase*

When applicable, Developers must follow FPIC processes, as outlined in the ERS Programme, before and during the completion of the [Livelihood Matrix](#).

STAKEHOLDER MAPPING AND COMMUNITY COMMITTEE

Once identified, Stakeholders must be categorised into Community Groups. The definitions of Community Groups and Stakeholder Types are included in their respective cells in the [Livelihood Matrix](#).

During the mapping process, the attributes and characteristics of each Community Group must be identified. If past grievances, disputes, conflicts, or any social issue of public knowledge exist, this can be included in the 'comment' section of the Community Group involved ('Stakeholder mapping' tab). Additional information on the community characteristics can also be included as comments.

💡 Core or direct Stakeholders should be mapped first as these are usually living in or are highly dependent on the Project Area and can provide information about other Groups.

Once Stakeholders are mapped out, Developers must constitute a Stakeholder Committee.

STAKEHOLDER COMMITTEE

1. Concept

The Stakeholder Committee is a deliberation committee that gathers **one** representative for each of the Community Groups identified.



2. Objective

Stakeholder Committees simplify the [Community Consultation](#) process by avoiding the need to gather all individual Stakeholders in one place at the same time.

3. Composition

Each Community Group must select one individual to be their representative. The representative must be:

- 3.1. Legitimately appointed by the Community Group they are representing.
- 3.2. Able to clearly communicate with the Developer to secure information exchange between them and the Community.
- 3.3. Compensated by their function as part of the Project's actions, and if collectively agreed upon.



Project Design *Phase*

BASELINE

During the Project Design phase, a baseline must be determined for each of the Livelihood dimensions: Livelihood, Employment & Fair Wages, and Cultural Heritage & Governance.

1. Concept

- 1.1. A baseline allows Developers to identify areas of improvement and define the Project's objectives and interventions to achieve Social Additionality.
- 1.2. It serves as a reference point to measure the achievement of said objectives and Social Additionality.

2. Approach

Each dimension nests four categories. The definition and activities to be reviewed in each category are:

2.1. **Livelihood**

- 2.1.1. **Living Standard:** A certain level of material attainment and access to electricity, safe water, and quality education.
- 2.1.2. **Health:** Physical, mental, social, and spiritual well-being, as well as availability and access to medical treatment.
- 2.1.3. **Infrastructure:** Physical capital such as:
 - Housing: Housing quality and housing improvements leading to adequate and affordable housing.
 - Community infrastructure: access to health clinics, schools, wells, meeting centres, etc. It also includes water supply infrastructure



and the availability of sewage treatments and irrigation systems, among other things.

- **Public Space:** Proximity to existing settlements and infrastructure (such as market access), as well as the availability of roads, public squares, parks, and other accessible areas.

2.1.4. **Climate Change Adaptation:** Environmental integrity and the capacity to adapt to climate change.

2.2. **Employment & Fair Wages**

2.2.1. **Wealth creation:** New jobs, increased income generation, access to credit, entrepreneurship, and income diversity.

2.2.2. **Quality Employment:** From the employee's perspective, considering income, work-life balance, environment, and social protection.

2.2.3. **Improved skills & knowledge:** New measurable skills, knowledge, professional qualifications and technical competence.

2.2.4. **Safety and ethics of employment:** Job characteristics that are conducive to workers' health, well-being and safety.

2.3. **Cultural Heritage & Governance**

2.3.1. **Project ownership:** Stakeholders validate and recognise Projects with some degree of ownership or engagement toward their development.

2.3.2. **Respect for collective rights and security:** Projects are designed and implemented according to the FPIC principles and do not threaten or harm the communities.

2.3.3. **Cultural values & well-being:** Projects respect the ability to express cultural and spiritual values, traditional resource management rules and local or regional languages.



- 2.3.4. **Sustainable heritage management:** Natural, tangible and intangible cultural heritage is identified and safeguarded.

3. Process

The Developer and Stakeholders or Committees must conduct the baseline assessment using participatory techniques. Each category must be assigned a score per Community Group, and scoring must follow the Stakeholders' vision of reality.

Scores are:

- **High** when a category is well-developed or established.
- **Medium** when some evidence or work is being done on the category, but it's not concrete/structured enough to be considered acquired.
- **Low** when there's little to no work being done in this category.

SOCIAL ADDITIONALITY

Social additionality is referred to as the additional socioeconomic benefits generated by the Project for its Community Groups, that would not have occurred without the Project.

💡 For example: "Health" at the beginning of the project was "low". Four years later it's scored as "medium" because the Project helped improve air quality, reducing respiratory issues in the Community.

SELECTION OF ACTIVITIES

1. Developers must report the key findings from the Baseline in the Consultation tab.



2. Developers and Stakeholders must determine each Community's overall objectives, which must reflect the community's current status and priorities.
3. Interventions are the concrete actions to achieve said objectives.
4. **Outcomes** must be set **within a four-year** timeframe.

ADAPTIVE MANAGEMENT

A review of the Livelihood Matrix is required every four (4) years. This process offers an opportunity to introduce new interventions or determine whether to persist with existing ones, considering their ongoing relevance to the Project or the need for additional time to accomplish them.



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