



681. Sustainability & Climate Action - Policy & Governance - Climate Action Plan Annual Review & Update

Category:	Sustainability & Climate Action
Subcategory:	Policy & Governance
Frequency:	Yearly
Status:	Statutory
Type:	Competent Person
Priority:	Core
Commonality:	Common

Note: This document provides guidance to support compliance but is not a substitute for professional advice.

Why This Task Matters

Your dedication to maintaining an up-to-date Climate Action Plan directly contributes to creating a safer and more sustainable learning environment for pupils and staff. By regularly reviewing and adjusting this vital document, you demonstrate your commitment to protecting future generations from climate impacts while ensuring the school or college remains a trusted, accountable institution. Your expertise in keeping these plans current builds confidence in the organisation's governance systems and recognises the essential role facilities staff play in supporting educational excellence through responsible environmental stewardship.

Task Summary

Statutory: This task requires reviewing and updating the Climate Action Plan each year to ensure progress is measured, targets remain realistic, and adjustments reflect new legislation or sector guidance. The review process involves assessing achievements against previous targets, identifying areas where objectives were not met, and incorporating any changes in regulatory requirements or best practice guidance. Staff should evaluate current data on energy use, carbon emissions, and

sustainability initiatives to determine if targets need adjustment. The updated plan should include revised timelines, new measurable goals, and clear accountability for implementation. Evidence of this review helps demonstrate compliance with statutory climate action requirements and supports governance accountability to regulators and stakeholders.

Relevant Legislation & Guidance

- **Climate Change Act 2008:** Establishes the UK's framework for reducing greenhouse gas emissions and requires organisations to demonstrate progress towards net-zero targets.
- **Environment Act 2021:** Provides additional powers for environmental governance and requires organisations to consider climate risks in their planning and operations.
- **DfE (Department for Education) guidance on sustainability in education:** Outlines expectations for schools and colleges to integrate climate action into their operations and curriculum.
- **Public Sector Decarbonisation Scheme:** Requires public sector organisations to report on their carbon reduction progress and implement action plans.
- **ISO 14001 Environmental Management Systems:** Provides best practice framework for organisations implementing environmental management systems, including climate action planning.

Typical Frequency

This task should be completed yearly, typically during the summer term or school holidays when there is more capacity for strategic planning. The frequency could vary based on risk assessment and specific context - for example, more frequent reviews might be needed if there are significant changes in legislation, major capital works planned, or if previous targets are significantly off-track. In education settings, the annual cycle aligns well with academic year planning and board reporting schedules, though organisations with multiple sites or complex estates might benefit from more frequent interim reviews to ensure targets remain realistic and achievable.

Applicability

This task is core and common, applying to all schools and colleges with statutory climate action obligations. It is required regardless of the size or type of educational establishment, as climate action planning is now a fundamental requirement for all public sector organisations. The task applies whether the institution has a dedicated sustainability team or relies on facilities staff to coordinate these activities. There are no circumstances where this task would not be required, as it forms the foundation of statutory compliance for climate action. The annual review ensures that plans remain current and responsive to changing regulatory requirements and organisational circumstances.

Responsible Persons

- **Task Type:** This is a Competent Person task that should be carried out by staff with appropriate knowledge of sustainability, climate action, and organisational governance. Typically, this would be the designated Sustainability Lead, Head of Estates, or a senior facilities manager with training in environmental management and policy development.
- **Contractor Requirements:** Not applicable as this is a Competent Person task.
- **In-House Requirements:** The person completing this task should have knowledge of climate legislation, experience with policy development, and familiarity with the organisation's governance structures. Training in environmental management or sustainability coordination would be beneficial but not always essential if the individual has relevant experience and access to appropriate guidance.
- **Permit to Work:** No permit to work is required for this task.
- **Delivery Model:** This task is normally completed in-house by trained staff, though external consultants may be engaged for specialist input on complex technical or regulatory aspects of the Climate Action Plan.

Key Considerations

Important factors to consider before undertaking this task include timing to align with board reporting cycles and academic planning, ensuring access to current data on energy use and emissions, and coordinating with curriculum staff for integration with teaching activities. Resource requirements are generally low but include time for data analysis and stakeholder consultation. The task should not cause significant disruption to school activities if planned during quieter periods. Risk assessment should consider the impact of any proposed changes to targets or timelines on the organisation's overall climate action commitments.

Task Instructions

Prerequisites & Safety

- Ensure access to current Climate Action Plan, performance data, and relevant legislation
- Confirm authority to update organisational policies and plans
- No specific safety requirements beyond standard office procedures

Tools & Materials

- Current Climate Action Plan document
- Performance data spreadsheets (energy use, emissions, sustainability metrics)
- Legislative updates and guidance documents
- Stakeholder consultation records
- Board/Trust meeting templates

Method (Step-by-Step)

1. **Gather Current Data:** Collect all relevant performance data including energy consumption, carbon emissions, waste volumes, and progress against existing targets.
2. **Review Legislative Changes:** Research and incorporate any new legislation, regulations, or guidance that affects climate action requirements.
3. **Assess Progress:** Compare actual performance against planned targets, identifying successes and areas where objectives were not met.
4. **Stakeholder Consultation:** Consult with relevant staff, governors, and external stakeholders to gather input on challenges and opportunities.
5. **Update Targets and Actions:** Revise targets to ensure they remain realistic and ambitious, incorporating lessons learned and new opportunities.
6. **Update Documentation:** Revise the Climate Action Plan document to reflect changes, ensuring clear timelines and accountability.
7. **Prepare Evidence:** Document all changes, reasons for updates, and approval processes.

Measurements & Acceptance Criteria

The updated Climate Action Plan should demonstrate measurable progress towards statutory targets, realistic timelines for remaining objectives, and clear accountability for implementation. Changes should be justified by data or legislative requirements rather than arbitrary adjustments.

If Results Fail

Follow instructions on the Compliance Pod task completion form to record remedial/follow up actions and generate Reactive Task Tickets as required. If the review identifies significant shortfalls in

progress, immediate actions should include consulting with governors or trust board, engaging external expertise if needed, and developing interim corrective action plans.

Reinstatement & Housekeeping

No reinstatement required. Ensure all documentation is filed appropriately and stakeholders are informed of any significant changes to the Climate Action Plan.

Completion Checks

Confirm that the updated Climate Action Plan includes all required elements, has been approved by appropriate governance bodies, and that all evidence has been uploaded to Compliance Pod.

Record-Keeping & Evidence

- **Upload Process:** Upload any required statutory or supporting evidence to the corresponding task form in Compliance Pod.
- **Statutory Evidence:** The updated Climate Action Plan and Board/Trust minutes recording approval of the review and any changes.
- **Supporting/Good Practice Evidence:** Tracked changes or revision notes showing what was reviewed and why changes were made.

Common Pitfalls & Best Practice Tips

Common mistakes to avoid include making unrealistic targets without proper data analysis, failing to consult stakeholders before major changes, and not documenting the rationale for updates. Best practices include aligning the review with board meeting cycles, involving curriculum staff for integration opportunities, and using data-driven approaches to target setting. In educational settings, link sustainability targets to curriculum activities to increase engagement. Warning signs include consistently missed targets without clear corrective actions or plans that become outdated due to lack of regular review.

Quick Reference Checklist

- [] Gather current performance data and legislative updates
- [] Assess progress against existing targets
- [] Consult stakeholders and gather input
- [] Update targets and action plans as needed
- [] Document changes and approval processes
- [] Upload evidence to Compliance Pod
- [] Communicate changes to relevant staff

Grouped Tasks

This task is not normally grouped with other tasks.

Related Tasks

- Sustainability & Climate Action - Policy & Governance - Sustainability Lead Appointment & Confirmation
- Sustainability & Climate Action - Policy & Governance - Sustainability Policy & Procedure Review
- Sustainability & Climate Action - Policy & Governance - Climate Action Progress Report to Governors & Trust Board
- Sustainability & Climate Action - Carbon, Energy & Resources - Carbon Emissions & Energy Use Monitoring
- Sustainability & Climate Action - Climate Risk & Adaptation - Climate Risk & Adaptation Audit
- Sustainability & Climate Action - Education & Engagement - Curriculum Integration Check for Climate & Sustainability

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