



682. Sustainability & Climate Action - Policy & Governance - Sustainability Lead Appointment & Confirmation

Category:	Sustainability & Climate Action
Subcategory:	Policy & Governance
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

By ensuring a dedicated Sustainability Lead is formally appointed and their role clearly defined, you play a crucial part in protecting pupils and staff from climate risks while demonstrating the organisation's commitment to responsible environmental stewardship. Your attention to proper governance in this area builds trust with regulators and the community, showing how facilities staff contribute essential expertise to creating safe, sustainable learning environments that support educational excellence for current and future generations.

Task Summary

Statutory: This task requires formally appointing and recording the designated Sustainability Lead at organisation level. The process involves identifying a suitable individual with appropriate knowledge and authority, documenting their appointment through formal HR processes, and ensuring their contact details and responsibilities are recorded in organisational systems. This includes confirming their competence in sustainability matters and their ability to coordinate across different teams and sites. The appointment should be approved by the governing body and communicated to relevant stakeholders. Evidence of this formal process demonstrates accountability and ensures climate action

responsibilities are clearly assigned within the organisation's governance structure.

Relevant Legislation & Guidance

- **Climate Change Act 2008:** Requires organisations to have clear accountability for climate action implementation.
- **Environment Act 2021:** Establishes governance requirements for environmental management and reporting.
- **DfE guidance on sustainability leadership in education:** Outlines expectations for designated sustainability roles in schools and colleges.
- **Corporate Governance Code for public sector organisations:** Requires clear accountability and reporting lines for strategic objectives including sustainability.
- **Health and Safety at Work Act 1974:** Implies governance responsibilities for environmental health and safety.

Typical Frequency

This task should be completed yearly, typically aligned with the academic year or when there are changes in leadership or organisational structure. The frequency could vary if the current Sustainability Lead leaves their role or if organisational changes affect their ability to fulfill the responsibilities. In education settings, annual confirmation ensures continuity during staff transitions and maintains accountability as the organisation's sustainability priorities evolve.

Applicability

This task is core and common, applying to all schools and colleges regardless of size or type. Every educational establishment must have a designated Sustainability Lead to meet statutory climate action requirements. The task applies whether the role is full-time or combined with other responsibilities, and whether the individual is internal staff or an external consultant. There are no circumstances where this formal appointment would not be required, as it forms a fundamental part of statutory compliance for climate governance.

Responsible Persons

- **Task Type:** This is a Competent Person task that should be carried out by HR staff, governors, or senior leadership with authority to make formal appointments. The process typically involves coordination between facilities management, HR, and governance bodies.
- **Contractor Requirements:** Not applicable as this is a Competent Person task.

- **In-House Requirements:** Staff completing this task should have knowledge of HR processes, governance structures, and sustainability requirements. The appointee (Sustainability Lead) should have relevant experience or training in environmental management, climate action, or facilities coordination.
- **Permit to Work:** No permit to work is required for this task.
- **Delivery Model:** This task is normally completed in-house through standard HR and governance processes, though external recruitment agencies may be used if appointing someone new to the role.

Key Considerations

Important factors include ensuring the appointee has appropriate time allocation for the role, access to necessary training and resources, and clear reporting lines to the governing body. Consider the individual's existing workload and whether additional support staff may be needed. The appointment should align with board meeting cycles to ensure proper governance oversight. Risk assessment should consider continuity planning if the role becomes vacant unexpectedly.

Task Instructions

Prerequisites & Safety

- Access to HR systems and governance meeting records
- Authority to make or confirm formal appointments
- Understanding of sustainability role requirements
- No specific safety requirements

Tools & Materials

- HR appointment templates and forms
- Job descriptions for sustainability roles
- Board/Trust meeting agendas and minutes templates
- Contact details recording systems
- Organisational charts and reporting structures

Method (Step-by-Step)

1. **Identify Suitable Candidate:** Assess current staff capabilities and identify individuals with appropriate knowledge, experience, and capacity for the Sustainability Lead role.

2. **Define Role Scope:** Ensure clear job description outlining responsibilities, authority, and reporting lines for the Sustainability Lead position.
3. **Formal Appointment Process:** Complete HR appointment or confirmation processes, including any necessary contracts or role descriptions.
4. **Governance Approval:** Obtain formal approval from governors or trust board for the appointment.
5. **Record Contact Details:** Update all relevant systems with the appointee's contact information and role details.
6. **Communication:** Inform relevant stakeholders of the appointment and role responsibilities.

Measurements & Acceptance Criteria

The appointment should be formally documented with clear terms of reference, appropriate authority levels, and confirmed governance approval. The appointee should demonstrate relevant competence or commitment to gaining necessary skills.

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 no suitable candidate can be identified, immediate actions should include consulting with governors about external recruitment options or interim arrangements.

Reinstatement & Housekeeping

No reinstatement required. Ensure all records are filed appropriately and previous appointee records are archived if this represents a change.

Completion Checks

Confirm that formal appointment documentation exists, governance approval has been obtained, and contact details are recorded in Compliance Pod and other relevant systems.

Record-Keeping & Evidence

- **Upload Process:** Upload any required statutory or supporting evidence to the corresponding task form in Compliance Pod.
- **Statutory Evidence:** Appointment letter or HR confirmation and Board/Trust meeting

record showing approval of the appointment.

- **Supporting/Good Practice Evidence:** Contact details entered into Compliance Pod and other organisational systems.

Common Pitfalls & Best Practice Tips

Common mistakes include appointing someone without adequate time allocation for the role, failing to define clear responsibilities, or not obtaining proper governance approval. Best practices include ensuring the appointee has relevant training or experience, providing clear reporting lines to the board, and planning for role continuity. In educational settings, consider combining the role with existing facilities or estates responsibilities to ensure practical implementation capability. Warning signs include frequent changes in appointees or lack of progress on sustainability initiatives.

Quick Reference Checklist

- ☐ Identify suitable candidate for Sustainability Lead role
- ☐ Define clear role scope and responsibilities
- ☐ Complete formal HR appointment process
- ☐ Obtain governance approval
- ☐ Record contact details in all systems
- ☐ Communicate appointment to stakeholders
- ☐ Upload evidence to Compliance Pod

Grouped Tasks

This task is not normally grouped with other tasks.

Related Tasks

- Sustainability & Climate Action - Policy & Governance - Climate Action Plan Annual Review & Update
- 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 - Education & Engagement - Curriculum Integration Check for Climate & Sustainability

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