



686. Sustainability & Climate Action - Carbon, Energy & Resources - Energy Efficiency Visual Check

Category:	Sustainability & Climate Action
Subcategory:	Carbon, Energy & Resources
Status:	Best Practice
Type:	Competent Person
Priority:	Recommended
Commonality:	Common

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

Why This Task Matters

Your vigilant visual checks for energy inefficiencies directly protect pupils and staff from unnecessary environmental harm while demonstrating your commitment to responsible resource stewardship that supports educational excellence. By identifying issues early through regular monitoring, you help maintain comfortable learning environments, reduce operational costs, and build confidence in the organisation's sustainability systems while recognising the essential role facilities staff play in creating efficient, healthy spaces for teaching and learning.

Task Summary

Best Practice: This task requires in-house staff to carry out a six-monthly walkaround, checking for obvious energy inefficiencies such as lights left on, heating controls mis-set, or draught issues. The inspection should cover all occupied areas including classrooms, offices, halls, and communal spaces, with particular attention to high-usage areas. Staff should use a systematic approach to identify common energy waste issues and document findings with photographs. The process should include checking heating settings, lighting controls, equipment standby modes, and building envelope integrity. Findings should be logged and any immediate corrective actions taken, with more complex

issues referred for specialist attention. This regular monitoring supports the annual professional inspection and helps maintain ongoing energy efficiency.

Relevant Legislation & Guidance

- **Climate Change Act 2008:** Supports energy efficiency monitoring as part of carbon reduction commitments.
- **Energy Savings Opportunity Scheme (ESOS):** Requires monitoring of energy use in public sector organisations.
- **DfE guidance on energy management in schools:** Recommends regular visual checks for energy efficiency.
- **CIBSE TM22 Energy Assessment and Reporting Methodology:** Provides guidance for building energy inspections.
- **ISO 50001 Energy Management Systems:** Recommends regular monitoring and checking procedures.

Typical Frequency

This task should be completed every 6 months, ideally aligned with term changes or seasonal transitions when energy use patterns shift significantly. The frequency could vary based on building size, previous findings, or if significant changes in occupancy or usage occur. More frequent checks might be needed during extreme weather conditions or if energy costs are rising unexpectedly. In education settings, bi-annual inspections provide regular assurance between annual professional assessments.

Applicability

This task is recommended and common, applying to all schools and colleges with occupied buildings. It is particularly valuable for establishments with multiple buildings or high energy consumption areas like science laboratories, ICT suites, and sports facilities. The task applies regardless of building age or complexity, though larger or older facilities may benefit more from regular monitoring. Schools and colleges should consider this essential for maintaining efficient operations and supporting sustainability objectives.

Responsible Persons

- **Task Type:** This is a Competent Person task that can be carried out by trained facilities or estates staff.
- **Contractor Requirements:** Not applicable as this is a Competent Person task.

- **In-House Requirements:** Staff should have basic training in energy efficiency principles and building systems. No specific certifications are required, but familiarity with the building and its energy systems is essential.
- **Permit to Work:** No permit to work is normally required for this task.
- **Delivery Model:** This task is normally completed in-house by trained staff, making it cost-effective for regular monitoring between professional inspections.

Key Considerations

Important factors include timing checks during occupied hours to identify real usage patterns, ensuring staff are familiar with normal building operations, and having immediate access to basic corrective tools. The task should be planned to avoid disrupting teaching activities. Consider weather conditions and seasonal energy use patterns when conducting inspections. Risk assessment should focus on safety when accessing different building areas and ensuring findings are followed up appropriately.

Task Instructions

Prerequisites & Safety

- Basic understanding of building energy systems and common inefficiencies
- Access to occupied areas during normal operating hours
- Camera or mobile device for photographic evidence
- Completed checklist template

Tools & Materials

- Energy efficiency checklist
- Camera or smartphone for photos
- Basic tools for immediate corrections (if appropriate)
- Building access keys/cards
- Thermometer for spot checks

Method (Step-by-Step)

1. **Preparation:** Review previous findings and prepare checklist for systematic inspection.

2. **Systematic Walkaround:** Visit all occupied areas following a predetermined route.
3. **Visual Inspection:** Check for obvious energy waste including:
 - Lights left on in unoccupied areas
 - Heating/cooling controls set inappropriately
 - Equipment left on standby unnecessarily
 - Windows/doors left open causing heat loss
 - Draughts from poor insulation or seals
4. **Documentation:** Record findings with photographs and complete checklist.
5. **Immediate Actions:** Address simple issues immediately where safe and appropriate.
6. **Reporting:** Log findings and refer complex issues for specialist attention.

Measurements & Acceptance Criteria

Checks should identify common energy waste issues with photographic evidence. Findings should be documented clearly and prioritised for corrective action.

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 significant energy waste is identified, immediate actions should include correcting obvious issues and arranging specialist investigation.

Reinstatement & Housekeeping

No reinstatement required. Ensure any immediate corrections are completed safely and areas left secure.

Completion Checks

Confirm that systematic inspection has been completed, checklist filled, photographs taken, and findings logged in Compliance Pod.

Record-Keeping & Evidence

- **Upload Process:** Upload any required statutory or supporting evidence to the corresponding task form in Compliance Pod.
- **Statutory Evidence:** No statutory evidence is required for this task.

- **Supporting/Good Practice Evidence:** Annotated photos, completed checklist, and logged findings.

Common Pitfalls & Best Practice Tips

Common mistakes include conducting checks too quickly without systematic coverage, failing to document findings properly, or not following up on identified issues. Best practices include developing a standard route for consistent coverage, taking clear photographs of issues, and involving staff in energy awareness. In educational settings, combine checks with other routine activities to improve efficiency. Warning signs include repeatedly finding the same issues or significant increases in energy costs without corresponding usage changes.

Quick Reference Checklist

- ☐ Prepare checklist and review previous findings
- ☐ Conduct systematic walkaround of all areas
- ☐ Check for lights, heating, and equipment waste
- ☐ Document findings with photos
- ☐ Address immediate issues where safe
- ☐ Log findings and refer complex issues
- ☐ Upload evidence to Compliance Pod

Grouped Tasks

Grouping is feasible; align with related tasks of the same frequency and contractor visit.

Related Tasks

- Sustainability & Climate Action - Carbon, Energy & Resources - Energy Efficiency Service & Inspection
- Sustainability & Climate Action - Carbon, Energy & Resources - Carbon Emissions & Energy Use Monitoring
- Sustainability & Climate Action - Carbon, Energy & Resources - Waste Generation & Recycling Monitoring
- Sustainability & Climate Action - Carbon, Energy & Resources - Water Consumption & Efficiency Monitoring
- Sustainability & Climate Action - Biodiversity & Ecology - Biodiversity & Habitat Enhancement Project Monitoring

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