



701. Sustainability & Climate Action - Policy & Governance - Climate Action Plan Development

Category:	Sustainability & Climate Action
Subcategory:	Policy & Governance
Frequency:	Once
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 developing a comprehensive Climate Action Plan directly contributes to creating safer, healthier learning environments for pupils and staff across the school year. By establishing clear environmental objectives and measurable targets, you're helping build confidence in the school's commitment to sustainability and climate resilience. This vital work ensures that facilities staff play a crucial role in protecting the wellbeing of the entire school community, demonstrating how your expertise in operational planning supports both immediate safety and long-term environmental stewardship.

Task Summary

This statutory task requires the development of a comprehensive Climate Action Plan that outlines the school, college, or trust's strategy for achieving net zero emissions and improving overall sustainability. The plan must establish clear objectives, measurable targets, and specific actions to reduce carbon emissions while building resilience to climate risks. In an education context, the plan needs to be practical and realistic across multiple sites, taking into account term-time operations and the need to balance teaching space requirements with environmental goals. The development process involves conducting baseline assessments, identifying emission sources, setting achievable targets,

and creating implementation timelines. Evidence produced includes the final approved Climate Action Plan document and Board/Trust minutes confirming its adoption, which demonstrate the organisation's commitment to environmental compliance and sustainable operations.

Relevant Legislation & Guidance

The Climate Change Act 2008 provides the overarching framework for climate action planning in the UK, requiring public bodies to work towards net zero emissions. The Department for Education's (DfE) Sustainability and Climate Change guidance specifically requires schools and colleges to develop and implement climate action plans. The Education and Skills Funding Agency's (ESFA) requirements for multi-academy trusts include mandatory climate action planning. Additionally, the Public Sector Decarbonisation Scheme provides funding and support for developing comprehensive climate action plans. These references are relevant because they establish the statutory and regulatory framework that makes this task mandatory for educational institutions.

Typical Frequency

This task is performed Once, typically as an initial development activity when establishing the school's climate action framework. The frequency may vary based on organisational changes, significant building developments, or when updating the plan following major policy changes. In education settings, this is usually a one-time development activity, though the plan itself will require annual reviews and updates. More frequent redevelopment might be needed if the school joins a multi-academy trust, undergoes significant expansion, or experiences changes in energy systems that substantially impact the baseline emissions assessment.

Applicability

This task is required for all schools, colleges, and trusts as a Core statutory requirement that is Common across the education sector. It applies regardless of school size, type, or location, as all educational institutions must demonstrate compliance with climate action planning expectations. The task is particularly relevant for organisations with multiple sites, where coordinated planning across locations is essential. There are no circumstances where this task would not apply, as climate action planning is now a fundamental requirement for all education providers. This task focuses specifically on the initial development phase and should not be confused with the ongoing annual review and update processes that follow.

Responsible Persons

- **Task Type:** This is a Competent Person task that should be carried out by senior facilities staff, sustainability coordinators, or designated environmental leads within the school or trust.

- **Contractor Requirements** (for Approved Contractor tasks): Not applicable for this Competent Person task.
- **In-House Requirements** (for Competent Person tasks): The task should be completed by staff with knowledge of environmental management, carbon accounting, and educational facilities operations. Training in sustainability planning, energy management, or environmental coordination is beneficial. Roles that could undertake this include facilities managers, business managers, or designated sustainability officers who understand both the technical aspects of emissions monitoring and the practical constraints of educational environments.
- **Permit to Work:** A Permit to Work is not required for this planning and documentation task.
- **Delivery Model:** This task is normally completed in-house by trained staff in most schools and colleges, though larger trusts may engage external sustainability consultants for specialist input on complex baseline assessments or carbon accounting methodologies.

Key Considerations

Before undertaking this task, consider the timing to ensure adequate consultation with stakeholders across the organisation. Budget implications may include costs for data collection, software tools, or external expertise for complex emissions calculations. Resource requirements include access to historical energy consumption data, building specifications, and staff time for stakeholder engagement. The task may require coordination with teaching staff, governors, and external partners to gather comprehensive information about current operations and future plans.

Task Instructions

Prerequisites & Safety

- Staff undertaking this task should have access to organisational data and be authorised to consult with senior leadership
- No specific safety procedures or PPE are required for this planning task
- Ensure access to relevant organisational policies, energy consumption data, and building specifications
- Consider manufacturer instructions for any energy systems that will be included in the assessment

Tools & Materials

- Organisational energy consumption data (electricity, gas, water, waste)

- Building specifications and floor plans
- Carbon accounting tools or spreadsheets
- Stakeholder consultation templates
- DfE climate action planning guidance
- Baseline emissions calculation methodology

Method (Step-by-Step)

1. **Gather Baseline Data:** Collect comprehensive data on current energy consumption, building specifications, and operational patterns across all sites
2. **Conduct Stakeholder Consultation:** Engage with teaching staff, facilities teams, governors, and pupils to understand current practices and identify opportunities
3. **Assess Current Emissions:** Calculate baseline carbon emissions using appropriate methodology for different emission sources
4. **Identify Key Opportunities:** Analyse data to identify the most significant emission sources and practical reduction opportunities
5. **Set Realistic Targets:** Develop measurable, achievable targets aligned with national and local climate goals
6. **Develop Action Plan:** Create detailed implementation plans with timelines, responsibilities, and monitoring mechanisms
7. **Establish Monitoring Framework:** Design systems for tracking progress and measuring the impact of implemented actions
8. **Review and Approval:** Present the plan to governing body or trust board for approval and adoption

Measurements & Acceptance Criteria

The Climate Action Plan should include specific, measurable targets that align with the school's capacity and resources. Baseline emissions should be calculated using recognised methodologies such as those from the Department for Business, Energy & Industrial Strategy (BEIS). Targets should be realistic and achievable within the education context, typically aiming for progressive reductions over 5-10 year periods. The plan should demonstrate how the school will contribute to national net zero goals while maintaining operational effectiveness.

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 baseline assessment reveals unusually high emissions or if targets cannot be realistically set, consult with external sustainability experts to validate calculations and ensure the plan's feasibility.

Reinstatement & Housekeeping

No specific reinstatement procedures are required for this planning task. Ensure all working documents are securely stored and that sensitive data is handled in accordance with data protection requirements.

Completion Checks

Confirm that the Climate Action Plan has been developed with comprehensive baseline data, stakeholder input, and realistic targets. Verify that the final document has been approved by the governing body and that adoption has been formally recorded. Ensure all evidence has been captured and 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 final approved Climate Action Plan document and Board/Trust minutes confirming adoption must be retained as statutory evidence of compliance with climate action planning requirements.
- **Supporting/Good Practice Evidence:** Working documents such as baseline data spreadsheets, stakeholder consultation records, and emissions calculation methodologies should be retained to support audit readiness and demonstrate the robustness of the planning process.

Common Pitfalls & Best Practice Tips

Common mistakes include setting unrealistic targets that cannot be achieved within the school's resources, or failing to adequately consult with all stakeholders. Avoid overcomplicating the plan with unnecessary technical detail that makes it difficult to implement. Best practice involves starting with a thorough baseline assessment and setting progressive targets that build confidence. In educational settings, remember to consider the impact of school holidays and term-time operations on emissions patterns. Warning signs include plans that focus only on energy consumption while ignoring other emission sources like travel or waste.

Quick Reference Checklist

- ☐ Gather all energy consumption and building data
- ☐ Consult with stakeholders across the organisation
- ☐ Calculate baseline emissions using appropriate methodology
- ☐ Identify key emission sources and reduction opportunities
- ☐ Set realistic, measurable targets

- ☐ Develop detailed action plans with responsibilities
- ☐ Establish monitoring and reporting framework
- ☐ Secure governing body approval and formal adoption
- ☐ Upload evidence to Compliance Pod

Grouped Tasks

This task is not normally grouped with other tasks.

Related Tasks

Based on the Sustainability & Climate Action category, related tasks that support comprehensive climate action planning include those focused on energy management, waste reduction, and sustainable transport. These tasks complement the Climate Action Plan by providing specific implementation mechanisms and monitoring frameworks.

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