



## 684. Sustainability & Climate Action - Policy & Governance - Climate Action Progress Report to Governors & Trust Board

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Category:	Sustainability & Climate Action
Subcategory:	Policy & Governance
Status:	<b>Statutory</b>
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

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Your meticulous work in preparing comprehensive progress reports empowers governors and trust boards to fulfill their legal accountability for climate action, ultimately safeguarding pupils and staff from environmental risks. By providing clear, accurate information about sustainability performance, you build confidence in the organisation's governance systems and demonstrate the crucial role facilities staff play in ensuring educational institutions remain responsible environmental stewards that protect current and future generations.

### Task Summary

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**Statutory:** This task requires producing and submitting a progress report each year to governors and/or the trust board, summarising performance against the Climate Action Plan. The report should include quantitative data on energy use, carbon emissions, and other key performance indicators, qualitative assessments of progress towards targets, explanations for any shortfalls, and recommendations for future actions. Staff should ensure the report is clear, concise, and supported by reliable data. The document should enable governors to make informed decisions about climate action priorities and resource allocation. Presentation of the report may include slides or verbal briefings to

facilitate discussion and decision-making by the governing body.

## Relevant Legislation & Guidance

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- **Climate Change Act 2008:** Requires governing bodies to be informed of progress towards carbon reduction targets and climate adaptation measures.
- **Environment Act 2021:** Mandates reporting and governance oversight of environmental performance.
- **DfE guidance on governance and sustainability:** Specifies requirements for board-level oversight of climate action in educational institutions.
- **Companies Act 2006 (for academies and trusts):** Requires directors to ensure adequate systems for monitoring and reporting on key risks including environmental matters.
- **Public Sector Decarbonisation Scheme:** Requires reporting of progress towards net-zero commitments.

## Typical Frequency

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This task should be completed yearly, typically aligned with the organisation's annual reporting cycle and board meeting schedule. The frequency could vary if there are significant changes in performance, new regulatory requirements, or if the board requests more frequent updates. In education settings, annual reporting coincides with academic year cycles and statutory reporting requirements, though quarterly updates might be beneficial for organisations with complex estates or ambitious targets.

## Applicability

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This task is core and common, applying to all schools and colleges as part of statutory governance requirements for climate action. Every educational establishment must provide regular progress reports to their governing body to ensure proper oversight and accountability. The task applies regardless of organisation size or structure, though the complexity of reporting may vary based on the number of sites and scope of climate action activities. There are no circumstances where this reporting would not be required, as it forms an essential part of statutory compliance and governance assurance.

## Responsible Persons

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- **Task Type:** This is a Competent Person task that should be carried out by the designated Sustainability Lead or senior facilities staff with access to performance data and knowledge of governance reporting requirements.

- **Contractor Requirements:** Not applicable as this is a Competent Person task.
- **In-House Requirements:** The person completing this task should have analytical skills for data interpretation, knowledge of climate action metrics, and experience with governance reporting. Training in sustainability reporting or data analysis would be beneficial.
- **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 complex data analysis or specialist reporting requirements.

## Key Considerations

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Important factors include ensuring data accuracy and reliability, presenting information in an accessible format for non-technical board members, and timing the report to allow adequate preparation time. Consider the board's information needs and any specific reporting requirements from funding bodies. The task should be planned to avoid peak academic periods that might affect data availability or presentation quality. Risk assessment should consider the implications of poor performance data and ensure balanced reporting of both achievements and challenges.

## Task Instructions

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### Prerequisites & Safety

- Access to current performance data and Climate Action Plan
- Understanding of governance reporting requirements
- Knowledge of data analysis and presentation techniques
- No specific safety requirements

### Tools & Materials

- Performance data spreadsheets and monitoring systems
- Climate Action Plan and targets documentation
- Report templates and presentation software
- Board meeting agendas and minutes systems
- Data visualisation tools

### Method (Step-by-Step)

1. **Collect Data:** Gather all relevant performance data including energy use, emissions, waste, and other sustainability metrics.
2. **Analyse Performance:** Compare actual performance against targets and identify trends, successes, and areas of concern.
3. **Prepare Report:** Create a comprehensive report summarising progress, challenges, and recommendations.
4. **Develop Presentation:** Prepare slides or other materials to support board discussion.
5. **Present to Board:** Deliver the report and presentation at the appropriate governance meeting.
6. **Record Discussion:** Ensure board minutes capture discussion points and any decisions made.

### Measurements & Acceptance Criteria

The report should provide accurate, comprehensive data presented in a clear format that enables informed governance decisions. Performance analysis should be balanced and supported by reliable evidence.

### 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 performance data indicates significant issues, immediate actions should include developing corrective action plans and consulting with external experts if needed.

### Reinstatement & Housekeeping

No reinstatement required. Ensure all presentation materials are archived appropriately and follow-up actions are tracked.

### Completion Checks

Confirm that the report has been completed, presented to the board, discussed, and that all evidence including minutes has been uploaded to Compliance Pod.

## Record-Keeping & Evidence

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- **Upload Process:** Upload any required statutory or supporting evidence to the corresponding task form in Compliance Pod.
- **Statutory Evidence:** The completed progress report, presentation slides, and board minutes showing discussion and acceptance.
- **Supporting/Good Practice Evidence:** No Supporting/Good Practice Evidence is required for this task.

## Common Pitfalls & Best Practice Tips

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Common mistakes include presenting raw data without analysis, failing to explain performance variances, or not providing actionable recommendations. Best practices include using clear visualisations, providing context for performance data, and focusing on both achievements and improvement opportunities. In educational settings, link sustainability performance to educational outcomes to demonstrate broader value. Warning signs include inconsistent data quality or reports that lack strategic insights for board decision-making.

## Quick Reference Checklist

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- ☐ Gather current performance data
- ☐ Analyse progress against targets
- ☐ Prepare comprehensive progress report
- ☐ Create presentation materials
- ☐ Present to governors/trust board
- ☐ Record discussion in minutes
- ☐ Upload evidence to Compliance Pod

## Grouped Tasks

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This task is not normally grouped with other tasks.

## Related Tasks

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- Sustainability & Climate Action - Policy & Governance - Climate Action Plan Annual Review & Update
- Sustainability & Climate Action - Policy & Governance - Sustainability Lead Appointment & Confirmation
- Sustainability & Climate Action - Policy & Governance - Sustainability Policy & Procedure

### Review

- Sustainability & Climate Action - Carbon, Energy & Resources - Carbon Emissions & Energy Use Monitoring

## Disclaimer

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