

Template for tracking clients' environmental action plans

Appendix E of the Environmental Policy template for Financial Service Providers (FSPs)

This appendix provides a **tracking sheet for clients' environmental action plans**, in the form of a ready-to-use table where each action is **coded**, described, **dated**, and rated in terms of **expected value** and **actual value**, with fields **for justification of discrepancies** and **recommendations**. This appendix enables the FSP **to operationalize** its environmental policy in the field, **standardize** monitoring by credit teams, and **document** progress/compliance with customers. To use it: fill in the header, **jointly develop priority actions** dated and discussed with the client, set the **expected value**, **update the actual value** at each visit/call, complete the justification & recommendations, **attach evidence** (photos, invoices, records) and, if relevant, **link certain milestones** to **disbursements** or follow-up decisions.

Client name:

File No.:

Industry:

Client contact:

Loan amount:

Rating:

Environmental Risk Management System No. [...]

No.	Activities		Maturity	Value		Justification for deviations	Recommendations
	Activity code	Activities to be carried out		Planned	Implementation		
1	ENER-01	Replace lighting with LED + programmer	09/30/2025	2	2	-	Estimated gain 15%
2	DECH-01	Waste sorting (organic/plastic) + reusable bags	07/31/2025	2	1	Customer habits	"Bring your own bag" poster + small incentives
3	DECH-02	Reduction in single-use plastics (bags)	07/31/2025	2	0	No alternative supplier	Test paper/recycled bags at wholesaler
4	COMP-01	Stop burning; composting/mulching	08/31/2025	2	1	Training required	Group demonstration with extension agent

Value: 0 = Not started · 1 = In course/partial · 2 = Completed.