



Department
for Education

Terms of Reference

Oak National Academy Review

May 2024

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Background

Oak National Academy (Oak) is an executive non-departmental public body that was established as an arm's length body (ALB) to the Department for Education in September 2022. Oak was originally created in 2020 as a rapid response to the coronavirus outbreak, to support schools' efforts to keep children learning. The decision to establish Oak as an ALB was taken after careful consideration and a full assessment of options, as set out in the business case¹ published in November 2022.

The strategic aims of Oak as set out in its Framework Document² are to:

1. work with schools, teachers and the wider education system to create, develop and support the use of free, optional, high quality full curriculum packages that are available to teachers and pupils through a robust, accessible digital education platform.
2. continue to provide a national contingency for remote education should it be needed in the event of disruption.
3. provide a package of connected stretching materials for teachers and pupils through the same digital education platform that is available across the four nations and draws on content and expertise from all areas of the UK.
4. establish Oak as a high performing, well respected sector organisation that: maintains its 'by teachers for teachers' approach; contributes to the growing understanding of curriculum best practice; is strategically aligned with, but operationally independent from government; and delivers excellent value for money.

The government set aside £43 million over three years (financial years 2022-2023 to 2024-2025) to support Oak.

¹ [Oak National Academy business case – GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/111111/Oak_National_Academy_business_case.pdf)

² [Framework Document available online – Oak National Academy](https://www.oaknationalacademy.org/framework-document)

On 30 October 2023, the government announced it would be investing up to an additional £2 million for Oak to develop AI tools that are safe, high quality and save teachers time, allowing them to focus more of their time on teaching and supporting pupils.

During the establishment of the ALB, the Secretary of State for Education agreed with Cabinet Office ministers to complete a review of Oak within the first 24 months of its launch.

Scope and purpose of the review

The government is committed to delivering brilliant outcomes for the public. To achieve that ambition, public bodies must become more accountable, efficient, effective, and aligned to the government's priorities. No public body exists in isolation and the review must also consider the efficiency and effectiveness of the department's Sponsorship Team.

In conducting the review, the Lead Reviewer must consider the government's Requirements for Reviews of Public Bodies³. It is expected that the review will consider the quadrants and themes (non-exhaustive), below.

- i. **Efficacy** - to ensure that Oak is meeting the conditions to be an ALB, that it has a clear purpose and the correct delivery model, it is performing effectively and is delivering services that meet the needs of citizens:
 - Does Oak have a clear mandate and remain relevant? Is there a clear rationale as to why the function of the ALB needs to continue?
 - Does Oak continue to meet one of the government's 'Three Tests' of ALBs?
 - Is Oak aligned with the strategic priorities of the department and wider government objectives, and how does it fit with associated areas of activity within the department?
 - Is Oak's delivery model the right one to deliver effective outcomes?
 - Does Oak have the correct systems and knowledge in place to deliver effective outcomes?
 - Does Oak have clear, measurable KPIs which are aligned to the strategic departmental priorities through its delivery plan and to government objectives?
 - To what extent is Oak delivering, or on track to deliver, its intended aims and benefits?
 - What are users' experiences of Oak?
 - Does Oak follow the government's functional standards?

³ [Requirements for Reviews of Public Bodies - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/requirements-for-reviews-of-public-bodies)

- ii. Governance** – to ensure that Oak is meeting the expectations of governance arrangements for ALB boards, chairs and non-executive members:
- Does the Oak board drive efficiency and effectiveness and support the delivery of the government's wider objectives?
 - Does the Oak board have a clearly articulated purpose and the correct balance of skills and experience appropriate to fulfilling its responsibilities?
 - Are current governance and assurance mechanisms appropriate to the type and scale of the organisation and evidenced in up-to-date documentation?
 - Does Oak have sufficient processes in place to develop its board members and appraise their performance?
- iii. Accountability** – to review the relationship between the department and Oak, and the support and challenge offered to Oak via the critical 'sponsoring' relationship the department has with it:
- Is there an effective and appropriate relationship between the department and Oak?
 - Is the classification and oversight of Oak appropriate for the balance of control and day-to-day operational independence?
 - What evidence is there that the Sponsorship Team supports the relationship between Oak, ministers and the Principal Accounting Officer as well facilitating Oak's delivery of government objectives?
- iv. Efficiency** – to ensure that Oak is meeting the expectations for financial management processes in line with current guidance, and the expectations for the identification of cashable efficiency gains made through change in practices, for example, digitisation and the workforce:
- Does Oak adhere to all existing financial guidance and have processes in place to track performance against clearly set goals?
 - Does Oak use benchmarking data to improve policy or drive efficiencies?
 - In what ways can Oak improve the productivity of, or reduce spending on, staff?
 - In what ways does Oak seek to develop the skills and expertise of its own staff, reducing reliance on external support where possible?

- Are Oak's digital services focussed on user needs and overall outcomes, and are they run in line with digital service standards? Are these services accessible for all users?

The Department for Education will be considering the market impact of Oak National Academy, following its establishment as an arm's length body, alongside the Review. The Department's assessment will be completed by September 2024.

Arrangements for the review

Responsible minister

The Minister of State for Schools is the relevant minister responsible. The Minister should receive initial findings and recommendations from the Lead Reviewer halfway through the review process. The Minister should provide their view on the direction of the review at that stage and their expectations for the second half of the process. At the end of the review process, the Minister should receive the Lead Reviewer's final report, complete with comments from Oak and the Sponsorship Team. The Minister will determine the government's response to the review (whether to accept or reject the recommendations).

Principal Accounting Officer

The Permanent Secretary is the Principal Accounting Officer responsible for the review and should have the opportunity to comment on both the initial findings and the final report ahead of submission to the Minister.

Lead Reviewer

The Oak review will be led by an independent Lead Reviewer, Lara Newman, Chief Executive of LocatED. The Lead Reviewer is accountable for the delivery of this review, its findings, and recommendations. The Terms of Engagement set out the duties of the Lead Reviewer and they should also comply with the Cabinet Office guidance referred to in the section on scope and purpose, above.

Review team

The Lead Reviewer will be supported by a team of Civil Servants from the department consisting of 2xGrade 7, 1.6FTE.

Evidence gathering and stakeholder engagement

The review team is encouraged to identify relevant stakeholders, including user groups, that may be contacted as part of the initial evidence gathering. Stakeholder views may be gathered in the form of interviews, focus groups or existing user surveys, such as TeacherTapp. It is recommended that stakeholders are identified in consultation with Oak and with the Sponsorship Team.

The review team should also request and examine documents from Oak and the Sponsorship Team. These should include any self-assessments completed prior to the review, as well as governance documents and records of meetings.

It is expected that the Lead Reviewer will meet with the board and senior leadership of Oak to discuss the approach, format, and milestones for the review. It is also expected that Oak and the Sponsorship Team will be given the opportunity to comment on the final report and recommendations ahead of it being submitted to the Minister.

If the Lead Reviewer is unable to access data or information that they believe is pertinent to the review from either Oak or the Sponsorship Team, the Lead Reviewer is advised to discuss the matter with the Senior Sponsors of Oak to seek a resolution.

Deliverables

The department should work with Oak to announce the review. The review team should notify the following Parliamentary committees: Education Select Committee and House of Lords Education for 11-16 Year Olds Committee. The review team should collate a completed self-assessment from Oak and the Sponsorship Team to inform the evidence base. Further evidence should be obtained through stakeholder engagement activity.

The Lead Reviewer should produce two reports to conclude each stage of the review, as described in the timetable section, below.

Timetable

The review will start in March 2024 and is expected to be concluded by the end of September 2024. The first phase of the review will seek to answer the key questions outlined above and in the government's Requirements for Reviews of Public Bodies.

The first phase will conclude with an initial report to the Minister by July 2024. That report will indicate the Lead Reviewer's initial findings, propose the areas of focus for the second phase and seek ministerial agreement to proceed.

The second phase of the review will seek to provide a more detailed examination of the initial findings, incorporating any ministerial comments to the initial report. The second phase will conclude with a final report/recommendations, and a summary of findings.

The Minister will determine the final timing and manner of publication of the review.



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