# Terms of Reference

## Oak National Academy Review

### December 2024

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# Background

The Government is launching an independent review of Oak National Academy (Oak). 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's objective is to advance the education, training, learning and development of children, young people and learners (and those supporting them) for the public benefit in the UK, particularly to improve pupil outcomes and close the disadvantage gap by supporting teachers to teach, and enabling pupils to access, a high quality curriculum whilst also reducing teacher workload.

# Scope and purpose of the review

In conducting the independent review, the Lead Reviewer will consider four key areas, as below.

i.     **Efficacy** - to ensure that Oak has a clear purpose and the correct delivery model, that it is performing effectively and that it is delivering services that meet the needs of teachers and young people.

- 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?
- 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?
- Are Oak's activities aligned to the government's strategic priorities?
- To what extent is Oak delivering, or on track to deliver, its intended aims and benefits?
- What are users' experiences of Oak (including teacher feedback and perspectives)?
- In what ways does Oak support teachers and schools, and what impact is this support having, or likely to have, on teacher workload and the quality of curriculum planning?
- Does Oak follow the government's functional standards?

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 as 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 early 2025.

# Arrangements for the review

## Responsible minister

The Minister of State for School Standards 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 Cabinet Office guidance on the conduct of public body reviews.

## Review team

The Lead Reviewer will be supported by a small team of Civil Servants from the department.

## 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. 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 Education Select 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 December 2024 and is expected to be concluded in early 2025. The first phase of the review will seek to explore the four key areas above.

The first phase will conclude with an initial report to the Minister. 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's findings.

Department for Education

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