

Service provider forum terms of reference

Purpose

The Legal Ombudsman's (LeO) Service Provider Forum exists to ensure that the perspectives of legal service providers are considered in strategic and operational decisions made by LeO.

In particular, the forum contributes service provider insight into:

- The service provider experience of LeO's rules and processes and any proposed changes to these.
- The service provider view of LeO's work under current and proposed annual business plan priorities and budgets.
- The service provider view of LeO's work under its strategic objectives.
- Issues and trends in the in the legal landscape that are affecting or might influence engagement with legal services.

The forum is distinct from the Challenge and Advisory Group, which exists to allow representatives from regulatory bodies and professional bodies to understand, challenge and have input into the progress of performance in LeO's recovery journey.

Membership

The forum consists of service providers who have experienced LeO's service. Representation will be sought from providers who fall under different regulation and different firm size to get an accurate representation of the legal services landscape.

Membership of the forum is deliberately undefined and intended to be flexible and it will be reviewed each year. LeO recognises that the huge diversity of service providers backgrounds, needs and experiences means the forum can never claim to be completely representative. However, LeO commits to making best efforts to ensure membership enables the broadest range of provider interests to be taken into account.

To support this, as part of LeO's ongoing stakeholder engagement, it will identify and invite those with specific expertise to the forum as required for example, where a proposed change might affect a particular demographic of service providers.

Conflicts of interest

LeO and forum members will work together to identify and resolve potential conflicts of interest.

Meetings

Frequency

The forum will meet twice a year, at points that enable it to effectively input into LeO's annual business planning cycle, and to consider LeO's progress against the current year's plans. This will typically be in [September/October] and [March/April].

Additional meetings may be called if the need arises – for example, if LeO is proposing changes to its rules, processes or priorities that were not discussed as part of the annual plan and budget cycle.

Format

Meetings are generally held online via MS Teams, though alternative formats may be used with members' agreement.

LeO may also seek members' views by email in between meetings, if it judges this is appropriate given logistical factors and the issue in hand.

Chair

Meetings are chaired by a representative of the Legal Ombudsman.

Agenda

LeO will give members as much notice as possible of meetings to ensure that there is an opportunity both to propose discussion items and consider relevant documents or topics.

While LeO takes responsibility for compiling meetings' agendas, any member of the forum can put forward topics for discussion. LeO will aim to include these if they are received a reasonable time in advance of the agenda being sent.

Ethos, confidentiality and transparency

Respect and inclusivity

The forum is a forum for open, respectful and constructive discussion, with the shared aim of ensuring good outcomes for providers. Members agree to engage in meetings in this spirit.

To support inclusive and meaningful discussion, any terminology used by LeO and forum members should be understood by all. The Chair will ensure that this aim is upheld, checking members' understanding and asking for clarification where appropriate.

Confidentiality

Members agree to respect the nature of any sensitive information that may be shared by others and to treat discussions as confidential. If a member would like to refer to information shared by another member outside forum meetings, they should not do so without the express permission of that member.

Transparency

LeO will publish a high-level summary of meeting discussions on its website or in relevant publications – both to explain how legal service provider perspectives have been taken into account in decision-making, and in the interests of transparency more generally. This summary will be agreed by attendees.