

Meeting	OLC Board Meeting	Agenda Item No. Paper No.	For Information 147.0
Date of meeting	17 June 2026		

Title	OLC Board Forward Plan
Sponsor	Kay Kershaw, Board Governance Manager
Status	OFFICIAL
To be communicated to:	Members and those in attendance

Executive summary	
The attached paper provides a record of the OLC Board's forward plan.	
Recommendation/action required	
Board is asked to note the forward plan.	
Equality Diversity and Inclusion	
EDI implications	Yes
The Board Forward Plan highlights dedicated Board sessions on EDI and in keeping with the Legal Ombudsman's commitment to inclusivity, this paper will be published on LeO's website.	
Freedom of Information Act 2000 (Fol)	
Paragraph reference	Fol exemption and summary
N/A	N/A
Value for Money (VfM)	
The Board Forward Plan highlights dedicated Board sessions that ensure regular scrutiny of LeO's financial management and strategic decision making in relation to the allocation of resources and value for money.	

High Level Board Forward Plan 2026											
Date of Meeting											
26 JANUARY BOARD MEETING Q3 reporting	Pre Board Session with Women's Network	2026/27 Budget, Business Plan, Budget Acceptance Criteria - approval for submission to the LSB	Update on LeO's digital transformation strategy	Joint Interim Chief Executive's report	Q3 Integrated performance report and balanced scorecard	EDI Update	Q3 Transparency publications report: *Board member Register of Interests *Ombudsman Register of Interests *Board member and senior manager expenses *Gifts and hospitality report				
25 FEBRUARY BOARD WORKSHOP In Cardiff	Developing the 2027/30 OLC Strategy	Engaging the Board in the 2025/26 Annual Report and Accounts									
29 APRIL BOARD MEETING Q4 reporting	Chief Ombudsman's report	Q4 integrated performance report and balanced scorecard	Updates from: *ARAC *PIDCo *RemCo	Service Complaint Adjudicator's annual report	2025/26 Skeleton Annual Report and Accounts and update on progress	Proposed changes to case fees, scheme rules and decision transparency	Launch 2026 Board Effectiveness Review	Leadership Structure	Update on the Budget Acceptance Criteria and Scheme Transformation Review bids.		
17 JUNE BOARD MEETING	For Information: 2026/27 Budget and Business Plan: Lessons learned	For Information: 2027/28 Budget: Planning and timetable	Developing the 2027/30 OLC Strategy	2025/26 Annual Report and Accounts	Update on Scheme Rules, case fee arrangements and decision transparency						
29 JULY BOARD MEETING Q1 reporting	Developing the 2027/30 OLC Strategy	Strategic risk workshop	Governance refresh	Feedback from the OLC Committees	Chief Ombudsman's report	Integrated performance report	Performance Sub Group update	Regulatory objectives	Annual report against the Welsh Language Scheme	Public Sector Equality Duty Bi- annual compliance update	Q1 Transparency publications reports
23 September WORKSHOP	Pre Board Session with the Disability and Carers Network	2027/28 Budget and business plan workshop	Developing the 2027/30 OLC Strategy	Scheme Transformation: Benefits realisation framework for changes to the Scheme Rules, cases fees and decision transparency	Update from OLC Committees	Session with the Legal Manager					

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28 OCTOBER BOARD MEETING Q2 reporting	Pre Board Session with REACH Network	2027/28 Draft Budget, Business Plan and Budget Acceptance Criteria	Developing the 2027/30 OLC strategy for approval	Chief Ombudsman's report	Q2 Integrated performance report	Updates from OLC Committees	Service Complaint Adjudicator's interim report	Assurance Framework proposal	Regulatory objectives	Q2 2025/26 Transparency Publications Reports
16 DECEMBER BOARD MEETING	Pre Board Session with the LGBTQ+ Network	2027/28 Budget and Business Plan	Updates from OLC Committees	Annual review of governance documents	Annual legal update and enforcement report					