Meeting	OLC Board Meeting	**Agenda Item No.** **Paper No.**	For Information 147.2
Date of meeting	17 June 2026		

Title	**2027/28 Budget and Business Plan: Planning and timetable**
Sponsor	Phil Cain, Chief Ombudsman Laura Stroppolo, Head of Programme Management and Assurance
Status	OFFICIAL
To be communicated to:	Members and those in attendance

Executive summary

In line with previous years, the Programme Management and Assurance Team will manage the 2027/28 Budget and Business Plan process through the established programme management framework, ensuring structured delivery, clear governance, and regular reporting throughout the cycle. The responsibility for overseeing the Budget and Business Plan process has been transitioned from the Head of Programme Management & Assurance to the Strategic Programme Manager. This change has been implemented to strengthen overall delivery capacity within the team while enabling the Head of Programme Management & Assurance to focus on strategic priorities and longer-term planning.

The 2026/27 cycle saw significant improvements in process maturity, with a more structured drafting approach, strong and effective governance engagement across Board and ARAC, and clearer, more coherent narrative and consultation.

The planning for the 2027/28 cycle builds on the lessons learned from the 2026/27 process, which demonstrated improvements in drafting, governance engagement, and overall process maturity, while highlighting opportunities to further strengthen early alignment, stakeholder engagement, and forward planning.

Executive discussions are underway to strengthen integration between the Transformation Programme and core business activity through clearer interdependencies, alongside continued engagement with the Legal Services Board to support further refinement of the approach. The Board will be kept regularly updated on progress, with a clear line of sight to the anticipated impact on the 2027/28 Budget and Business Plan.

The high-level timetable has been developed to reflect these improvements, introducing earlier engagement, clearer decision points and strengthened assurance throughout the cycle, while maintaining alignment with statutory and external approval requirements.

For this cycle, implementing the lessons learned the approach has been refined to focus on:

- Earlier definition of narrative, assumptions, and transformation scope to reduce late-stage changes
- Stronger and earlier alignment with key stakeholders (Board, MoJ and LSB), including increased direct engagement
- Enhanced consultation design and broader stakeholder reach, particularly strengthening the consumer voice
- Embedding multi-year financial planning and scenario modelling to reduce reactive adjustments

Progress will be tracked against agreed milestones, with regular updates to Executive, ARAC and the Board.

High-level milestones and timetable have been developed based on previous cycles and updated to reflect lessons learned:

- Initial engagement has taken place with Executive colleagues to shape early assumptions and planning priorities
- Early discussions have been factored in for MoJ and LSB engagement, supporting improved alignment at the outset
- Governance milestones, including Board and ARAC, have been mapped to support structured oversight across the cycle. Under the revised governance approach, the Performance Sub-Group (PSG) is only scheduled to meet in July, with its future role and frequency to be considered as part of the wider governance refresh and will be presented to the Board for discussion and approval at July Board
- Planning includes clear separation of planning, drafting and approval phases, improving coordination and delivery

Board approval for the Business plan and budget is scheduled for 28 October, with submission to the LSB required by 2 November. This creates a compressed turnaround; however, this risk is recognised, and mitigating actions are being put in place to ensure readiness ahead of Board approval.

LSB Board meeting in March is yet to be confirmed; once scheduled, the timeline will be updated accordingly. On the basis of the proposed approach, final budget and business plan papers will be issued to the LSB four weeks in advance of the meeting.

The 2027/28 milestones can be found in Appendix A.

Recommendation / action required

Board is asked to **share their thoughts and feedback following the 2027/28 cycle.**

Equality Diversity and Inclusion

EDI implications	**Yes**

The Budget and Business Plan process incorporates ED&I considerations throughout its development, with ED&I a key enabler in LeO's Business Plan and Strategy. The Budget Acceptance Criteria pose questions relating to the whole of LeO's operations, including its delivery of EDI-related objectives, for the forthcoming year.

The Budget and Business Plan process continues to reflect the organisation's commitment to Equality, Diversity and Inclusion, both in how it engages externally and how plans are developed internally. This will be implemented by an inclusive consultation design, broader stakeholder engagement and alignment with organisational EDI objectives.

Following from the 2026/27 Budget and Business Plan cycle, the process will ensure clarity and accessibility of consultation design, with more structured questions and clearer rationale supporting greater engagement and understanding across stakeholders.

Freedom of Information Act 2000 (FoI)

Paragraph reference	**FoI exemption and summary**
N/A	N/A

Value for Money (VfM)

The proposed approach to the 2027/28 Budget and Business Plan process is expected to further strengthen value for money by ensuring a clearer and more consistent alignment between demand, cost drivers, and planned delivery. Building on improvements achieved in the 2026/27 cycle, the introduction of earlier narrative alignment and more robust financial planning will support a stronger evidence base underpinning funding proposals.

High-level milestones

2027/28

Key Dates

Budget & Business Plan

May
- 🟦 Project planning

June
- 🟩 01 June - Initial Budget proposals Deadline (Opex / capex)
- 🟩 17 June – OLC Board: Budget & Business Plan timeline
- 🟩 17 June - ARAC: Budget & Business Plan timeline

July
- 🟩 2 July - Exec outline and initial discussions on 26/27 Budget & business plan
- 🟩 9 July - Performance Sub-Group

Aug
- 🟩 18 Aug - Exec Meeting – budget considerations and substance of Business Plan consultation
- 🟩 10 Aug - Draft Budget Acceptance Criteria received from LSB

Sept
- 🟩 3 Sep – Exec review and approval of B&BP consultation
- 🟩 23 Sep- OLC Board: development of consultation, budget & business plan

Oct
- 🟩 1 Oct - Exec review approval: draft budget, business plan, consultation, BAC
- 🟩 19 Oct – ARAC Budget Assurance Principles
- 🟩 28 Oct- Board approval / delegated Chair approval of, draft budget, business plan and consultation

Nov
- 🟩 By 2 Nov– Submit draft papers to LSB
- 🟩 4 Nov - Formal consultation launched
- 🟩 TBC - Consultation events
- 🟩 24 Nov - LSB Meeting –draft budget and business plan / draft budget acceptance criteria

Dec
- 🟩 Medium term financial plan to MoJ
- 🟩 4 Dec – Final Budget Acceptance Criteria received from LSB
- 🟩 23 Dec - Consultation closes
- 🟩 16 Dec – OLC Board meeting

Jan
- 🟩 7 Jan - Exec review of consultation responses
- 🟩 13 Jan - Exec approval – Budget, Business Plan and final budget acceptance criteria
- 🟩 w/c 11 Jan - Issue summary of stakeholder consultation to OLC Board
- 🟩 27 Jan - OLC Board approval of Budget & Business Plan

Feb
- 🟩 TBC - Delegated Chair approval or approved LSB pack
- 🟩 TBC – issue final budget and business plan papers to LSB

Mar
- 🟩 XX Mar - LSB Board Meeting – approval of Budget & Business Plan
- 🟩 TBC - MoJ confirm OLCs revenue & Budget
- 🟩 Mar / Apr – Publication of B&BP

Drafting and preparation of 2027/28 Business plan & Budget →

Further refinement of Business plan & Budget →

Transformation Design and Discovery Phase – Q3-Q4 →

- ◇ Unplanned
- 🟨 Managing Risk
- 🟥 Significant Risk
- 🟩 On Track
- 🟦 Complete