

<b>Meeting</b>	OLC Board	<b>Agenda Item No.</b>	4
		<b>Paper No.</b>	131.3
<b>Date of meeting</b>	30 January 2024	<b>Time required</b>	40 minutes

<b>Title</b>	<b>2024/25 Business Plan and Budget and Budget Acceptance Criteria and 2024/27 Strategy</b>
<b>Sponsor</b>	Paul McFadden, Chief Ombudsman/Laura Stroppolo, Head of Programme Management and Assurance/Stephanie Godbold, Head of Communications, Engagement and Impact (interim)
<b>Status</b>	OFFICIAL
<b>To be communicated to:</b>	OLC Board

<b>Executive summary</b>
<p>At its December 2023 meeting the OLC Board received a verbal update on 2024/25 Business Plan and Budget and 2024-27 and Strategy development process. The Budget Acceptance Criteria document had been submitted in draft to the Legal Services Board in November 2023, with the LSB subsequently confirming it would be making no amendments to the criteria.</p> <p>At the time of December’s meeting, the formal consultation period on the Business Plan, Budget and Strategy was still underway, having been two weeks longer than usual given the inclusion of a new three-year strategy. The consultation ended on Friday 22 December and received 12 responses. A summary of key points of agreement and challenge has been shared for Board’s attention.</p> <p><i>Feedback and response</i></p> <p>To help provide clarity, the consultation asked a direct question about respondents’ support for each aspect of the strategic priorities, 2024/25 plans and budget.</p> <ul style="list-style-type: none"> <li>• In the main, respondents endorsed the proposals. In line with the previous two years, there is clear recognition of LeO’s progress in improving customers’ experience, and the impact of early resolution in particular.</li> <li>• The value of LeO’s strategic focus on delivering greater learning and insight is also supported by the majority of responses.</li> <li>• A small minority of respondents told us LeO should instead focus on delivering continued improvements in customer journey times during 2024/25.</li> </ul> <p>As such, the OLC isn’t proposing any substantive changes from the budget outlined in the draft submission. To reflect the consultation feedback and further developments in the meantime, the documents have been updated to:</p> <ul style="list-style-type: none"> <li>• Strengthen the emphasis on the link between OLC’s objective for LeO service and that for its impact (see also proposed Chair/Chief Ombudsman introduction). This includes further underlining the effect of sharing and operationalising the learning from complaints on LeO’s ability to deliver a proportionate, effective and efficient complaint-handling scheme.</li> </ul>

- Update key assumptions and trajectories for the 2023/24 and 2024/25 financial years, correct as at the end of December 2023, following January’s Performance Subgroup meeting.
- Make small updates and additions to address points of clarification arising from LSB queries – for example, the inclusion of more information on income.
- For the Budget Acceptance Criteria only, add new information that was pending at the time of the draft submission, including a summary of consultation feedback and its impact, and confirmation that a medium-term plan has been submitted to MoJ.

Alongside the final documents on LeO’s website, we also intend to publish the updated joint OLC Chair and LeO Chief Ombudsman introduction, together with a consultation feedback summary in line with the one presented to Board.

**Recommendation/action required**

The Board is asked to:

- **Note** the update on the 2024/25 Business Plan and Budget and 2024-27 Strategy consultation process and stakeholder feedback
- **Approve** the 2024/25 Business Plan and Budget, Budget Acceptance Criteria and 2024/27 Strategy documents, subject to any amendments arising from feedback provided at the meeting
- If necessary, **agree** any delegated authority required for this sign-off.

**Equality Diversity and Inclusion**

**EDI implications**

**Yes**

The OLC’s new Strategy and Business Plan for 2024/25 will have an impact across the Legal Ombudsman’s operations. EDI matters in respect of LeO’s people, its customers, and wider legal service users have been addressed through the Strategy and Business Plan development process, and both are supported by LeO’s work under its EDI strategy. Criteria 5 of the Budget Acceptance Criteria submission sets out more detail about this.

**Freedom of Information Act 2000 (Fol)**

**Paragraph reference**

**Fol exemption and summary**

Attachments: Draft documents attached

Fol Exempt S.22 – information intended for future publication