

# ALPMA Annual Report 2011 - 2012



**ALPMA**  
Australian Legal Practice  
Management Association





## Everything we do is designed to deliver on our promise to members.



|                              |         |                    |         |
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## Our Vision

To be the key resource and leading voice for the legal practice management profession in Australasia.

## Our Mission

- Enhance the theoretical and practical understanding, skills and knowledge of legal practice management professionals.
- Promote excellence and innovation in legal practice management.
- Represent the legal management professional within the legal industry and broader community.

## Our Values

Our values provide the members, Board, staff and volunteers with a model against which individual, team and organisational behaviours can be aligned and measured.

**Knowledge:** We aim to grow the knowledge of our members, their organisations, our partners and the legal practice management profession.

**Development:** We strive to support the personal and professional development of our members and the development of their organisations, our partners and the legal practice management profession.

**Community:** We aim to build a close-knit community of legal practice management professionals to support our members, their organisations, our partners and the legal practice management profession.

**Respect:** We treat each other with respect and strive to enhance the respect in which our individual members, their firms, our partners and the legal practice management profession are held.

**Innovation:** We seek innovation in all that we do and encourage innovation by our members, their organisations, our partners and the legal practice management profession.

## OUR PROMISE TO MEMBERS

Being a member of ALPMA will help you:

- **Develop** your core management skills
- **Build** your knowledge across multiple professional domains
- **Lead** your firm's development
- **Connect** and **collaborate** with peers, experts & industry leaders
- **Accelerate** your career progression
- **Gain respect** as a legal practice management professional.





## A year of change and growth

2011/2012 has been a year of significant change for ALPMA, and one where we have laid the foundations for future growth and the next stage of our evolution as a membership association dedicated to a vision of being the "key resource and leading voice for the legal practice management profession in Australasia".

This year, we have worked hard to articulate exactly what it is that ALPMA promises our members - and to make sure that everything we do delivers on some aspect of this promise.

In FY12, the National Board has also embarked on a strategic planning process that resulted in a clear set of strategic priorities to guide our future direction, and the development of strategies to support their achievement. You can read more about that on page 14.

This report also showcases our expanded Learning & Development program – from the National HR Workshops held in March 2012, to the ALPMA National Summit and our webinar program, our revamped website and improved online services and the industry research undertaken in 2011/12. ALPMA continues to perform at or near the top of the class in terms of member engagement and satisfaction and this is largely due to these services and the real sense of being part of a close-knit community with common issues and challenges that membership brings.

Looking back on the year, we certainly have managed to get a lot done, and I would like to personally thank our committee members (all volunteers with day jobs!) who have willingly contributed their time and efforts to making ALPMA successful.

We look forward to the next stage in our journey, as we continue to grow and evolve as a professional membership association. I thank all members, partners and supporters for your support over the last year, and hope you will continue to support us on this sometimes wild, but always exciting ride!

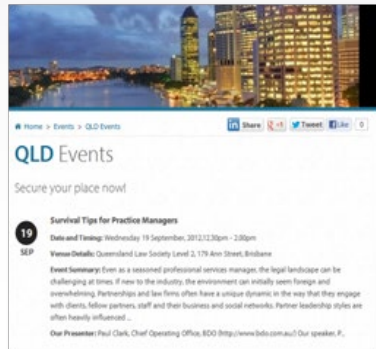


**Warrick McLean**  
ALPMA President

## Learning & Development Program

### Monthly lunchtime seminars

The 10 monthly lunch time seminars conducted in Melbourne, Adelaide, Brisbane and Sydney continue to be the lynchpin of ALPMA's learning and development program for members.



Congratulations to each of our dedicated State Branch Committees and Secretariats, who continue to put together an engaging and inspiring program to help our members develop their leadership skills and management expertise across the multiple professional domains covered by legal practice managers – from HR, to finance, IT, marketing, business development and knowledge management.

The seminars are also highly valued as a forum to connect with other legal management professionals and industry experts to share knowledge and experiences. Member feedback from our seminars continues to be very positive – and corporate partners are lining up to support us and be involved.

### Expanded webinar program

Webinars are a great way for members to build their knowledge on key topics of interest and obtain great value from their ALPMA membership – without having to leave the office! In 2011/12, ALPMA conducted webinars on topics ranging from the ALPMA Legal Industry Salary Survey and the ALPMA Legal Industry Financial Benchmarking Survey results to Attracting & Retaining High Performers and Social Media and Web 2.0.

ALPMA's National Learning and Development Committee, chaired by Mary Hockaday, has committed to further expanding our webinar program in financial year 2013.

## 2012 National HR Workshops

In March 2012, ALPMA rolled out its first national half day workshop - taking the HR Workshop format successfully developed by ALPMA Victoria on the road to Melbourne, Adelaide, Sydney and Brisbane.

Facilitated by Kris Will, an industry leading HR consultant and ALPMA life member, and featuring an expert panel of legal HR practitioners and employment lawyers, the National HR Workshops were a resounding success, with close to 150 delegates with HR responsibilities attending across the country.

The National HR Workshops are now set to become a permanent fixture on the ALPMA learning and development calendar, with plans for 2013 now well underway! Inspired by this success, the National Learning and Development Committee are also planning a National Finance workshop for 2013.

## ALPMA National Summit

The ALPMA National Summit continues to develop its reputation as the premier event in the legal management calendar in Australia. The 2011 ALPMA National Summit, was held from 16-17 September at the Crown Conference Centre in Melbourne, and attracted close to 200 delegates from across Australia.

The 2011 Summit Committee did a fantastic job in bringing together an inspirational and well balanced program, headlined by Chrissy Lightfoot and featuring Patty Keagan, Dr Ken Hudson and Alec Bashinsky. Thanks also to our major 2011 Summit partners for their support.



Summit Platinum Sponsor:



Summit Gold Sponsors:



Summit Silver Sponsors:







## Online Services

### ALPMA Website

This year, ALPMA experienced the highs and lows associated with launching a completely new website (which also serves as our core operational, marketing and online booking system) in May 2011.

After some major teething problems, (eventually resolved with the appointment of Bosweb as ALPMA's web developer and support provider) things started to settle down and ALPMA really began to leverage the power of the new system.

In July, 2012 ALPMA refreshed the look and feel of the site, revamped site navigation to make it easier to find things, and completed a significant upgrade to ACCESS ALPMA, the member-only area of the ALPMA website which included:



## Upgraded Seminars On Demand

Most monthly seminars and webinars conducted by ALPMA across Australia are recorded live and placed in the Seminars On Demand area of ACCESS ALPMA. We introduced a search capability so members can search the library by speaker, classification, State and topic, making it much easier to find a relevant seminar. Members can also rate and comment on each seminar. As well as letting members catch seminars or webinars that they have missed or those from another State, the Seminars on Demand library provides a highly-relevant, topical and cost-effective resource for members' internal professional development programs. The new "Featured Presentation" can be viewed by anyone without logging in, and gives non-members an opportunity to experience an ALPMA seminar and webinar.

## New Member Directory

The new ALPMA Member Directory in ACCESS ALPMA helps members connect with other ALPMA members they have met at ALPMA functions, find an ALPMA member who may be able to help them in a particular area or to see who else belongs to ALPMA.

## New Member-Only Deals

Our partners have put together a great range of special deals exclusively for ALPMA members and these are listed in the Member-Only Deals page in ACCESS ALPMA.

## Improved Online Membership Services

Members can now also better update their details, reset their passwords and manage their membership online. This year, most of our membership renewals were completed on-line. ALPMA also made a number of improvements to our online registration process for all ALPMA events – for the first time in 2012, most Summit registrations were done online!





## ALPMA Legal Industry Research

### ALPMA Australian Legal Industry Salary Survey

The 2012 ALPMA Australian Legal Industry Salary Survey, kindly sponsored by Legal People, was conducted in March 2012.

The salary survey report (pictured) provided detailed salary breakdowns, showing the lowest, highest and “average” salaries paid for 57 positions at law firms, including executive management, lawyers, HR, Finance, IT and Marketing managers, paralegals and administrative staff. This was further analysed by firm size and state, so participants could directly compare compensation strategy with like firms.

This year, participation was opened to non-member firms, which resulted in close to 200 firms taking part in this survey – and making it one of the largest, most comprehensive salary surveys of the Australian legal industry. The survey was also expanded this year to include detailed information on employment benefits offered across the industry, the mix of part-time, contract, casual and full-time workers employed at law firms, plus anticipated salary increases and recruitment intentions for the next 12 months. The survey also generated some excellent media coverage for ALPMA.



## Legal Industry Financial Performance Benchmarking Survey

The FY2011 ALPMA Legal Industry Financial Benchmarking Study, conducted in conjunction with Crowe Horwath in November 2011, generated a significant level of interest from members and provided a fascinating insight into the financial health of the legal industry.

Firms throughout Australia and New Zealand participated in the benchmarking ranging in size from large mid tiers to small firms and sole practitioners.

The annual Benchmarking Study enables law firms to compare the financial health of their practices using Crowe Horwath's proprietary benchmarking tool, Open Measures.

The benchmarking tool highlights eight key financial indicators of practice health and results can be compared across a number of filters including fee revenue and work type. As with the Salary Survey, participation in ALPMA research activities is free.

## Hot Issues In HR Survey

For the first time, ALPMA conducted a "Hot Issues in HR for 2012" Survey to provide an snapshot of the hot issues in HR facing legal firms in Australia each year. The results of the Hot Issues in HR Survey provided excellent input for the ALPMA National HR Workshops held in March, and were published in the ALPMA March 2012 e-newsletter.



## 2011/12 Corporate Partners

ALPMA sincerely thanks it's 2010/11 Corporate Partners, whose generous support helps us deliver a quality National and State learning and development program for members, while keeping membership fees low.

### National Corporate Partners



### State Corporate Partners

#### Victoria

Dunsford Financial  
Planning  
Legal People  
Speech Recognition  
Australia Fuji Xerox

#### New South Wales

Carlyle Perring  
Toshiba  
Crowe Horwath

#### Queensland

Easi-File Business  
Solutions  
Crowe Horwath

#### South Australia

MacArthur Law Staff  
COS  
Quick Corporate  
Perpetual Trustees  
Paytec Softlog

### State Supporters

#### South Australia

legalsuper  
Boileau

#### Queensland

legalsuper  
Complete Office Supplies  
RBC Business Solutions  
Elliot's

## ALPMA People

### National Board Members

ALPMA's National Board is comprised of elected representatives from each State Branch Committee. The National Board meets monthly via teleconference, and is supported by the National Operations Manager and Marketing & Business Development Manager. National Board members volunteer their time to help drive the growth and success of ALPMA and we owe them and their supporting firms a debt of gratitude for the commitment and enthusiasm they have brought to the task this year.



**President**  
Warrick McLean  
Coleman Greig  
Lawyers



**Vice President**  
Gill Duffy  
TressCox Lawyers



**Treasurer**  
Andrew Barnes  
Harwood Andrews



**Company Secretary  
National Learning &  
Development Chair**  
Mary Hockaday  
Vincent's



**Valmai Vickers**  
Ryan Carlisle  
Thomas



**Lisa Sikorski**  
Septimus Jones  
& Lee



**Sally King**  
Carroll & O'Dea  
Lawyers



**Anthony Bleasdale**  
Maurice Blackburn



**Tobias Crush**  
Piper Alderman



**Robyn Clissold**  
Andersons Solicitors



### The ALPMA Team

ALPMA is a “virtual” organisation, staffed by a lean, part-time and dedicated team, working typically from home offices to deliver ALPMA’s programs and services, support members and ALPMA committees and help grow the organisation. In 2011/12 there were a number of significant changes in the composition of this team.

In December 2011, Kerrie Billings stepped down from her role as ALPMA National Secretariat - although she retains her involvement with ALPMA, continuing on as the Victorian Secretariat and also running half of David & Goliath, our current Summit conference organiser. As the inaugural National Secretariat, Kerrie made a significant contribution to ALPMA, guiding the organisation through national amalgamation and establishing many of our core membership services. We sincerely thank Kerrie for her outstanding service in this role.

In November 2011, ALPMA welcomed Nicki Hauser as our new Marketing & Business Development Manager, who took over from Michael Sugg. Nicki hit the deck running and has been instrumental in driving many of the new growth initiatives at ALPMA, while revamping our partner program - already securing a record number of partners for ALPMA in FY13.

Also joining the team this year was Connie Finestone, ALPMA’s Operations Manager. Connie supports the National Board and the National Learning & Development Committee, as well as managing national activity including research programs, national webinars, workshops and State secretariat support. Connie has streamlined and documented many of ALPMA’s processes and procedures and is steadily working her way through improving our operational systems, ensuring we have a stable foundation from which to grow.

In Queensland, we welcomed Michelle Brookes, taking over as Queensland Secretariat from Jenny Watson. Jenny also continues to work with ALPMA as the other half of David & Goliath, our Summit conference organisers. In South Australia, we welcomed Marija Lee, taking over as SA Secretariat from Mary-Anne Sotiropoulos. Sally Lowe continued to do a great job in NSW as NSW Secretariat.

## Strategic Priorities

This year, the ALPMA National Board completed the ALPMA Strategic Plan for 2012-15. The plan identified four strategic priorities for ALPMA, and supported these with a detailed implementation program and budgets to ensure their achievement.

### Deliver on our Promise to Members & Partners

Everything we do at ALPMA is designed to deliver on our promise to members and partners. Key initiatives in the plan include the continued expansion of our national learning and development program, ALPMA Summit, our research programs and our online information services to meet member needs plus professional management of our partner program, which helps fund member services. You can see the progress we are already making in a number of these areas just by reading this report!

### Grow our Membership

Our goal is to see continued growth of ALPMA membership throughout Australasia as a result of ALPMA's membership acquisition program and growth strategy. New initiatives that are in the pipeline include the development of an Associate Member category, Group Membership to encourage multiple members from one firm and continuing build on our membership engagement and renewal programs.







### Become a Respected Voice of the Industry

ALPMA's priority is to be widely known and acknowledged as the "go to" National peak body for Australian legal practice managers, their staff and legal firms. Key initiatives include the development of a formal PR program and an effective social media presence.

### Build a Strong Organisation

Governance & Leadership: The plan outlined a number of initiatives to support the Board in governing ALPMA while management manages ALPMA; a partnership in the leadership and management of ALPMA.

### People, Processes & Systems Development

ALPMA is also focusing on its people, process and internal infrastructure over the course of the plan, to ensure we have the structures, processes, infrastructure, information and positions that are aligned to and assist in delivery of the strategies contained in its Strategic Plan.

We look forward to working with our members, partners and the broader legal community in Australasia to achieve these strategic priorities!

# FINANCIAL REPORT FOR THE YEAR ENDED 30 JUNE 2012



## Operating Results

The deficit of the company for the financial year amounted to \$69,943.

It is important to highlight the influences on this result for the financial year.

- i) The variances in the conference income and expenses brought to account are the result of a change in the timing of recognition of conference contribution. Prior to 2011/12 these items were on a 'cash' basis which was inconsistent with the 'accrual' basis for regular membership and sponsorship items. This policy changed at 30 June 2012, which saw a preliminary net contribution from the conference of \$118,067 deferred for recognition until 2012/13. This change was motivated by consistency within the accounts and, if it had not been amended, would have seen a net surplus of almost \$50,000 reported at 30 June 2012.

|                          | 2012           | 2011           | \$Var          | %Var         |   |
|--------------------------|----------------|----------------|----------------|--------------|---|
| <b>INCOME</b>            |                |                |                |              |   |
| Memberships              | 174,744        | 145,650        | 29,094         | 20.0%        | excellent                               |
| Sponsorship              | 176,901        | 161,000        | 15,901         | 9.9%         | excellent                               |
| Conference               | 309,036        | 364,263        | -55,227        | 5.2%         | (i)                                     |
| Workshops/Seminars       | 66,975         | 54,912         | 12,063         | 22.0%        | encouraging                             |
| Other                    | 27,459         | 24,758         | 2,701          | 10.9%        |   |
|                          | <b>755,115</b> | <b>750,583</b> | <b>4,532</b>   | <b>0.6%</b>  |   |
| <b>EXPENSES</b>          |                |                |                |              |   |
| Conference               | 218,563        | 339,106        | 120,543        | 35.5%        | (i)                                     |
| Secretarial              | 255,542        | 205,822        | -49,720        | -24.2%       | New Contractor, duplication, transition |
| BD & Marketing           | 101,029        | 51,391         | -49,638        | -96.6%       | New Contractor, great new outputs       |
| Workshops/Seminars       | 83,892         | 49,787         | -34,105        | -68.5%       | New programs, costs in development      |
| Other                    | 166,032        | 128,433        | -37,599        | -29.3%       |   |
|                          | <b>825,058</b> | <b>774,539</b> | <b>-50,519</b> | <b>-6.5%</b> |   |
| <b>SURPLUS (DEFICIT)</b> | <b>-69,943</b> | <b>-23,956</b> | <b>-45,987</b> | <b>-192%</b> | Net of adjustments for 2012 Conference  |

# FINANCIAL REPORT FOR THE YEAR ENDED 30 JUNE 2012

## Positive Outlook

This positive outlook is underlined by the following key balance sheet extracts.

The Association therefore embarks on 2012/13 from a very solid foundation.

The full ALPMA Financial Report for the year ended 30 June 2012 is available at [www.alpma.com.au](http://www.alpma.com.au) – Member area, Member news.

|                       | 2012    | 2011    | \$Var   | %Var  |                                      |
|-----------------------|---------|---------|---------|-------|--------------------------------------|
| Cash at bank          | 544,129 | 400,289 | 143,840 | 35.9% | Significant 2012/receipts in advance |
| Receivables           | 191,098 | 111,531 | 79,567  | 71.3% | Committments from new partners       |
| Income in advance     | 316,408 | 179,205 | 137,203 | 76.6% | 2012/13 members and sponsors         |
| Conference in advance | 118,067 | 0       | 118,067 | -     | 2012 Brisbane Summit committments    |

For more information about ALPMA

Email: [info@alpma.com.au](mailto:info@alpma.com.au)

Visit [www.alpma.com.au](http://www.alpma.com.au)

Call: 1300 692 256

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