ALPMA
ANNUAL REPORT 2015-2016

ALPMA
Australasian Legal Practice Management Association

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ALPMA. ADDING VALUE TO THE BUSINESS OF LAW.

The Australasian Legal Practice Management Association, (ALPMA), is the peak body representing managers and lawyers with a legal practice management role. ALPMA provides an authoritative voice on issues relevant to legal practice management. Members of ALPMA provide professional management services to legal practices in areas of financial management, strategic management, technology, human resources, facilities and operational management, marketing and information services and technology.

ALPMA'S VISION MISSION & VALUES

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, contractors, 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.

PRESIDENT'S REPORT

ALPMA had another successful year! As we embarked on the first year of our 2015 - 2018 Strategic Plan, the focus was to continue to deliver on our promise to members, grow our membership, expand our horizons though strategic relationships, and grow reserves and resources to facilitate future growth.

The competitive landscape is changing, both for ALPMA and the broader legal profession. ALPMA continues to work hard to help its members take advantage of the opportunities these changes bring and to successfully address the challenges they present.

As an organisation, I am pleased to report that we continue to make strong progress and grow our share of what is an increasingly competitive market. We are positioning ourselves for flexibility in order to be ahead of the curve.

This report sets out ALPMA's achievements and financial position at the end of the 2015-16 financial year, and I encourage members to review this and see how your association is delivering on its promise to you.

These accomplishments would not have been possible without the dedication and commitment of the ALPMA team – a collaborative effort between board, committee volunteers, contractors and partners who strive to improve the relevance and value of ALPMA. On behalf of the ALPMA Board of Directors, I would like to acknowledge the efforts of our team as we continue to thrive and grow.

Finally, I sincerely thank all of our partners and members for their on-going support of ALPMA.

Andrew Barnes
ALPMA President

GROWING OUR MEMBERSHIP

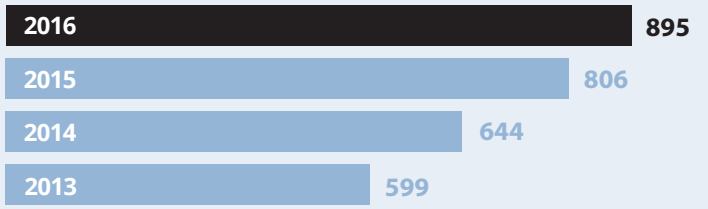
Our promise to members is at the core of everything we do at ALPMA and this focus ensures we are on track as we strive to expand both nationally and overseas. Membership continues to grow year on year with total membership numbers at 895 on 30 June 2016 – 11% growth on the previous year.

All branches recorded growth in membership with Western Australia, New Zealand and Queensland reporting the highest growth.

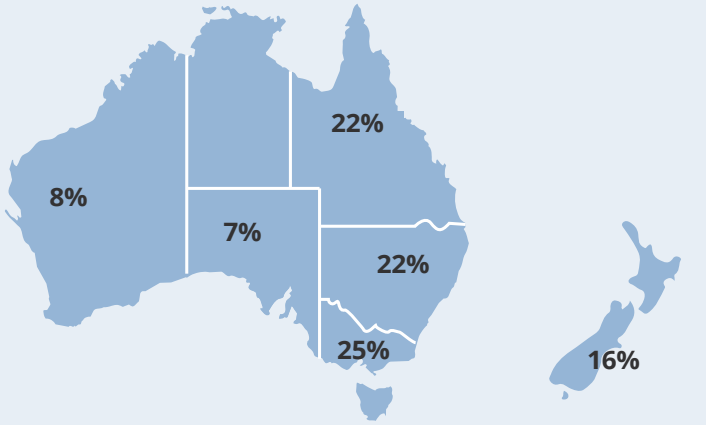
New Branches – Western Australia and New Zealand

Growth in membership in our newest markets – Western Australia and New Zealand – has been phenomenal over the last few years, thanks to the dedicated committee of volunteers in each location, our secretariats and the support of local partners. ALPMA has now recognised Western Australia and New Zealand as formal Branches of ALPMA, with membership allocated to each group, and delivery of full membership services on the ground in Auckland and Perth.

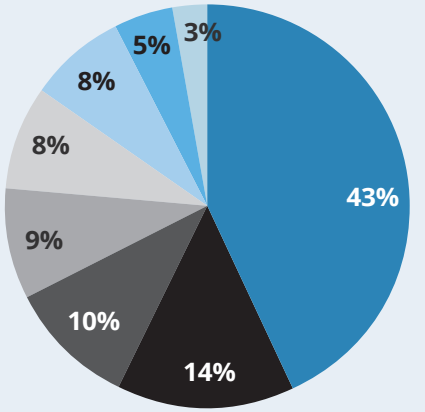
Membership growth



Membership by location



Membership by role



DELIVERING ON 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.

DELIVERING ON OUR PROMISE TO MEMBERS

FOCUS ON LEARNING & DEVELOPMENT

This year, ALPMA appointed its first Learning & Development Manager to focus on this core area for members. This role works closely with the National Learning & Development Committee to establish a learning and development plan to take the organisation forward, and manage ALPMA's current Leading Your Firm program, national webinars and the ALPMA On-Demand Learning Centre.

The ALPMA Legal Practice Management Learning & Development (L&D) Framework outlines the six 'pillars' of knowledge that legal practice managers and law firm leaders need to understand in order to effectively manage and lead their firms. All our events, programs and resources (including the ALPMA website) are designed to deliver content aligned to this framework.

Practice Management Seminars

During 2015-2016 ALPMA delivered 52 practice management lunch-time seminars in Melbourne, Sydney, Brisbane, Adelaide, Perth and Auckland. These seminars were delivered by subject-matter and domain-experts across a broad range of topics spanning the six pillars of ALPMA's Legal Practice Management Learning and Development Framework, and provided practical insights and advice that could be applied directly at members' firms.

Our seminars continue to be well-attended and provide an excellent opportunity for members to connect with each other and our Corporate Partners who support these events. We value the strong relationships we have built with our 2015-2016 partners and thank them for their strong support, which allows us to continue to offer these events at no cost to members.

DELIVERING ON OUR PROMISE TO MEMBERS

Leading Your Firm Program

In 2015-2016, ALPMA successfully delivered three live-streamed events and 5 webinars specifically targeted to meet the needs of smaller and regional law firms as part of the Leading Your Firm program. These events continued to attract large audiences, both at the host event and online. Participation in this program is free for members. Each event in the program was recorded and made available from the ALPMA On-Demand Learning Centre.

National Webinars

ALPMA conducted five national webinars in 2015-2016, sharing the results of our industry research program and showcasing the winning entry in the 2015 ALPMA/InfoTrack Thought Leadership Awards – LegalVision's innovative content marketing strategy. These webinars were delivered free for ALPMA members and research participants.

Local Events

During the year, ALPMA also conducted various state-specific events such as the VIC HR Workshop, QLD Regional Forums and Small Firm Practice Managers Group, NSW End of Year Awards, WA networking events and SA breakfasts. These State-specific events underline ALPMA's ability to deliver a nationally aligned L&D framework without losing sight of the unique objectives and requirements of our local branch network.

ALPMA On-Demand Learning Centre

This year, ALPMA added 60 new on-demand presentations to the On-Demand Learning Centre. These are video and audio recordings of presentations given at ALPMA's practice management seminars, Leading Your Firm program, national webinars and Summit over the course of the year.

The centre is also a great source of quality on-demand practice management CPD/CLE for lawyers. ALPMA members enjoy free access to most event recordings.

The more than 260 on-demand recordings now available within the On-Demand Learning Centre represent a significant asset and opportunity for ALPMA to leverage to extend its reach into new markets. We are currently working on improving accessibility to this content, both from an infrastructure and a packaging perspective.

DELIVERING ON OUR PROMISE TO MEMBERS

2015 ALPMA SUMMIT

The 2015 ALPMA Summit "**Tomorrow's Firm: Digital, Divergent & Differentiated**" was held from 9-11 September at the Gold Coast Convention & Exhibition Centre. The Summit continues to break delegate records year on year with over 312 law firm leaders and managers attending in 2015, which included a very strong New Zealand contingent.

Program highlights included the Summit presentations and pre-Summit Masterclass workshops "Rising Waters: How Law Firms Can Adapt To The New Legal Environment" by Canadian Jordan Furlong, Edge International, "Bringing Your Strategy to Life" by US-branding guru Tim Williams from the Ignition Consulting Group, and presentations by Emeritus Professor, Gillian Triggs, President of the Australian Human Rights Commission, Dr George Beaton of Beaton Consulting and Dr Bob Murray, Fortinberry Murray.

The Summit Trade Exhibition attracted a record number of partners and exhibitors. Thanks to our Principal Summit Partner, LexisNexis for their generous, on-going support and to all of our partners and exhibitors who helped us make this event such a success.

DELIVERING ON OUR PROMISE TO MEMBERS

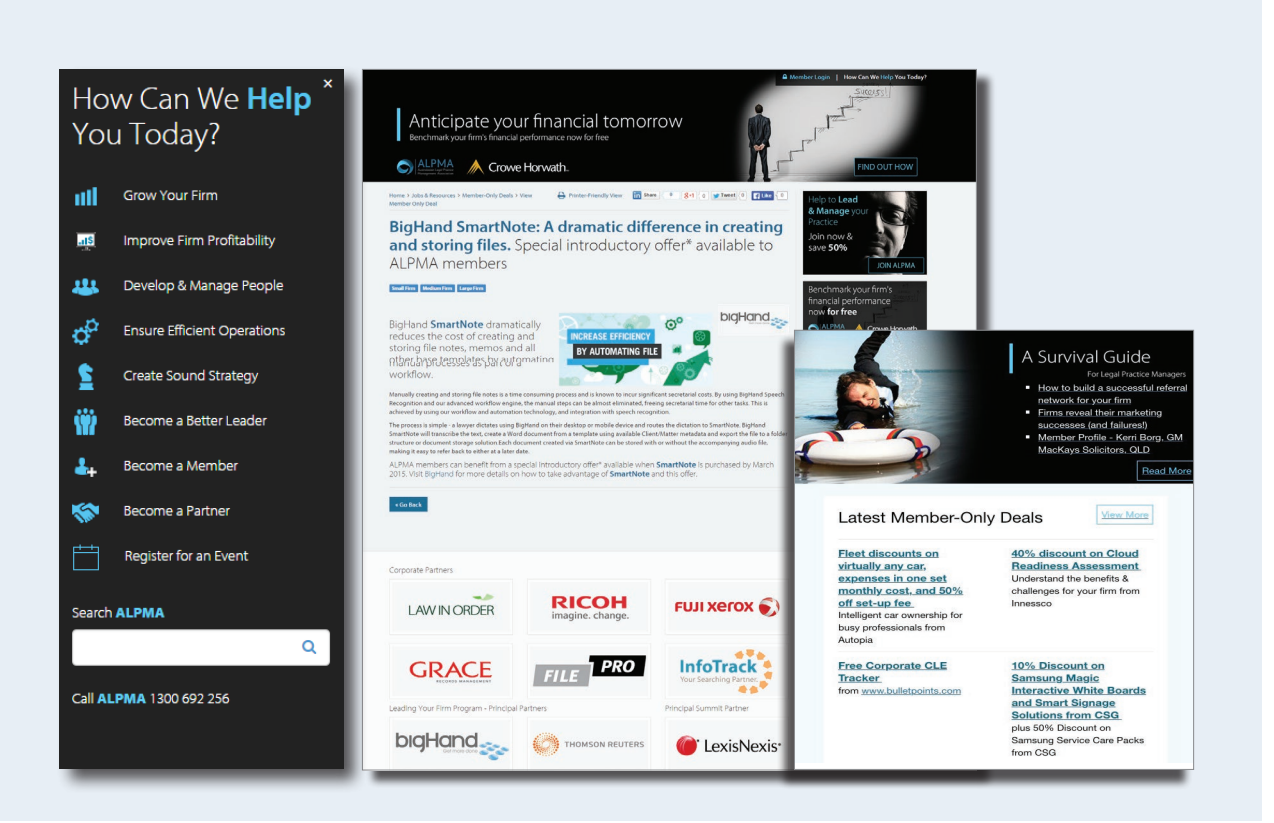
ONLINE MEMBER SERVICES

ALPMA delivers a range of online services to help members connect with each other and find new staff and suppliers for their firm, including:

- ALPMA Member Directory
- Exclusive Member-Only Deals
- Job Bank with free listings for members
- Business Directory of legal industry suppliers

All content on ALPMA's website is categorised by the six pillars of ALPMA's L&D Framework, making it easy for members to quickly find information relevant to their needs, whether it is advice on growing their firm, increasing firm profitability, creating sound strategy, developing and managing people, becoming better leaders or ensuring operational efficiency.

The ALPMA blog "A Survival Guide for Legal Practice Managers" provides a weekly source of advice from leading industry experts delivered direct to the inbox of 1,000+ ALPMA members and subscribers.



BECOMING THE RESPECTED VOICE

THOUGHT LEADERSHIP

The 2015 ALPMA/InfoTrack Thought Leadership Awards shone a light on innovative projects and initiatives conducted by firms across the legal sector over the last 12 months in response to the changing legal landscape.

LegalVision, an online law firm targeting small to medium Australian businesses, was crowned the 2015 ALPMA/InfoTrack Thought Leadership Award winner, ahead of finalists RMB Lawyers, The Conveyancing Shop and LawLab, at the ALPMA Summit Gala dinner in the Gold Coast on Thursday 10 September, 2015.

LegalVision was recognised for their inbound content marketing program, which transformed legalvision.com.au into Australia's most visited legal services website and drove a significant increase in new business for the online firm.

ALPMA/InfoTrack Thought Leadership Awards - 2015 Winner

ALPMA LEGAL INDUSTRY RESEARCH

ALPMA runs a widely-respected, independent legal industry research program that provides critical management information and strategic insight to help members understand legal industry trends, employment and economic conditions, and benchmark their firm against similar firms.

Legal Industry Salary & HR Issues Survey

The Australasian Legal Industry Salary and HR Issues Survey provides a comprehensive, independent review of salaries paid for 60+ legal, management and support roles at Australian and New Zealand law firms. The 2016 survey supported by Empire Group (Australia) and McLeod Duminy (NZ), was expanded to include target position descriptions and a break-down of salary data by state and firm size. Participation in the survey continues to grow each year, making it the most comprehensive review of salaries and HR issues in the Australasian legal industry.

Legal Industry Financial Performance Benchmarking Study

For the first time in 2015, ALPMA and Crowe Horwath conducted two financial performance benchmarking surveys – one providing benchmarking information for New Zealand law firms in August and for Australian law firms in November – to accommodate the different financial years and reflect the differing economic conditions in both markets.

Legal Industry Marketing & Business Development Research

The 2015 ALPMA/Julian Midwinter & Associates law firm marketing and business development research "Winning Work in a Digital World" focused on understanding how well law firms are responding to the challenge of winning new business in the digital era. More than 160 firms participated in the 2015 research.

BECOMING THE RESPECTED VOICE

Impact of the Changing Legal Landscape on Australasian Law Firms

The 2015 ALPMA/LexisNexis research "Preparing Australasian Law for a Digital, Divergent, Differentiated Future" investigated the changes Australasian law firms planned to make to the markets they serve; their resourcing mix; marketing and business development strategies; internal systems and processes; legal services delivery model and strategic relationships.

PR & ONLINE COMMUNITY

The results of ALPMA's research program attracted strong media attention, and helped consolidate ALPMA's position as the authoritative voice on legal practice management issues. In 2015, ALPMA issued 10 media releases and doubled our media coverage, with 60+ stories published.

ALPMA maintains a strong online presence, actively engaging with the broader legal practice management community via its Twitter, LinkedIn, Facebook and Google Plus social media accounts.

In 2015, ALPMA extended its digital footprint, creating its own YouTube channel featuring short snippets from its On-Demand Learning recordings, member and partner testimonials and insights into the ALPMA Summit, Awards and research programs. This strategy also allowed ALPMA to leverage video content on its website and as part of its marketing strategy.

The ALPMA LinkedIn Group grew to 1,500+ members, providing a great forum for online discussion and interaction amongst members and partners

DOMESTIC & INTERNATIONAL RELATIONSHIPS

A key focus for ALPMA during the year has been developing strategic relationships with other legal industry associations including our US sister organisation the American Association of Legal Administrators (ALA), the Australian Law Management Group (ALMG) of the Australian Law Council and the State-based Law Societies.

Our aim is to develop collaborative relationships where all legal industry associations work together to advance legal practice management across Australasia.

These relationships take time but our efforts are beginning to bear fruit. ALPMA is currently working closely with the ALMG and a range of partners to deliver a one day symposium in Singapore in late November, 2016.

CONSOLIDATION & CONTINUOUS IMPROVEMENT

ALPMA is committed to ensuring the highest standards of corporate governance and is dedicated to the continual review and improvement of our governance structure, practices and procedures.

During the year, ALPMA reviewed its risk management framework and developed new policies, declarations and guidelines on the Appointment and Role of Board and Committee members. A board performance review was initiated to review the effectiveness of the ALPMA Board and governance practices (conducted by an external consultant in July/August 2016).

From a financial perspective, the year was one of consolidation, with careful management of expenses in all areas in order to meet budget and add to reserves – for sustainability of the association and to fund our growth initiatives.

ALPMA BOARD

The ALPMA Board drives the strategic direction for ALPMA and includes elected members from each Branch Committee as well as board nominated representatives.

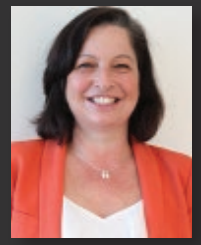
Board of Directors 2015 – 2016

President

Andrew Barnes
Lantern Legal Group (VIC)

Vice President

Susan Comerford
Cowell Clarke (SA)



Treasurer

Begonia Silvestre
Hunt & Hunt (VIC)

Company Secretary

Valmai Vickers
Ryan Carlisle Thomas (VIC)

Director of Education

Mary Hockaday
Mary Hockaday Consulting (QLD)

Past President

Warrick McLean*
Coleman Greig Lawyers (NSW)

Director of New Projects

Tobias Crush
Piper Alderman (SA)

Risk & Compliance

Dion Cusack
K&L Gates (VIC)

Director

Emma Elliot
Steinepreis Paganin (WA)

Director

Sheryll Carey
Lowndes Jordan (NZ)

Director

Emily Mortimer
Piper Alderman (SA)

Director

Carey Waterworth
Bennett & Philp (QLD)

* Until November 2015

ALPMA BRANCHES & COMMITTEES

ALPMA Branches & Committees

The success of ALPMA is underpinned by the generous support of more than 60 members who volunteer their time to serve on ALPMA Branch Committees. in 2015-2016, we had Branches operating in Victoria, New South Wales, Queensland and South Australia. In 2016, Western Australia and New Zealand were recognised as stand-alone Branches of ALPMA.

The National Learning & Development (L&D) Committee chaired by the Director of Education and L&D Manager is made up of nominated representatives from the Branch Committees and oversees the development and implementation of the L&D program for ALPMA. A dedicated Summit Committee also operates as a sub-Committee of the ALPMA Board and is responsible for developing the program for the event.

ALPMA Contractor Team

ALPMA continues to operate as a "virtual" organisation, staffed by a part-time, dedicated team of contractors, working from home offices to deliver ALPMA's programs and services, support committees and members and help grow the organisation.

The ALPMA Team includes national contractors supporting overall operations and branch secretariats to support members and committees at a local level.

OUR PARTNERS

We value the strong relationships we have built with our 2015-2016 partners and thank them for their support, which allows us to continue to deliver our services to members.

Australian Corporate Partners

GRACE RECORDS MANAGEMENT
FUJI xerox
legalsuper
LAW IN ORDER
GLOBALX LEGAL SOLUTIONS
SAI GLOBAL

State Corporate Partners

LEGAL PEOPLE
lilsupport job well done
FILE PRO
InfoTrack
in view recruitment
timg
MACQUARIE BANK
st.george business banking
LexisNexis
CORPORATE TRAVELLER Bring an expert on board

NZ Corporate Partners

COMMARC Independent Technology Consultants
SOUND BUSINESS SYSTEMS
QuickFee.
KONICA MINOLTA
BigHand
RICOH imagine. change.

OUR PARTNERS

Major Summit Partners

LexisNexis
InfoTrack
BigHand
MACQUARIE BANK
ESR SOLUTIONS GROUP
litsupport job well done
LAW IN ORDER
timg
Worldox Cloud Hosted by MATTER SOLUTIONS

Leading Your Firm Partners

THOMSON REUTERS
COMMARC Independent Technology Consultants
BOAB IT
AMBS
Diversify Intelligent Staffing Solutions

FINANCIAL SUMMARY 2015-2016

ALPMA made a trading profit for 2015/16, which was a turn-around on the previous 4 years' results. The Board remains committed to increasing reserves while still delivering growth and fulfilling our commitments to our members and partners.

The significant movements in cash is due to lower receivables and higher total of income in advance – Conference in advance income is double what it was last year, and again, we had a record number of delegates at the 2016 Summit.

ALPMA is a not-for-profit company limited by guarantee. The full ALPMA financial report for the year ended 30 June 2016 is available at www.alpma.com.au – Member area, member news.

	2016	2015	$ Var	% Var	
Cash at Bank	775,820	565,457	210,363	37.2%	Cash received in advance for next (2016/17) financial year
Receivables	278,259	367,746	-89,487	-24.3%	Commitment from new partners/members/Summit registrations
Income in Advance	496,580	579,125	-82,545	-14.3%	2016/17 members and partners
Conference in Advance	238,754	118,234	120,520	101.9%	2016 Melbourne Summit
Members Funds	171,288	140,348	30,940	22.0%	Net equity position of the Association
Gross Income	1,474,734	1,365,185	109,549	8.0%	
Operating Expenses	1,439,703	1,367,884	71,819	5.3%	
Surplus/(Deficit)	**35,031**	**-2,699**	**37,730**		