

ALPMA

Annual Report 2016 - 2017



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.

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ALPMA Vision, Mission and 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 profession.



PRESIDENT'S *Report*

We are much more than Summit. We are much more than the monthly practice management seminars. We are committed to our promise to members and that will remain as our primary focus.

The 2016-17 financial year will be regarded as a solid year from ALPMA, right when it needed to have one. In the middle year of a three-year strategic plan, the Association was able to deliver on our promise to members by challenging ourselves to enhance our offering whilst also taking steps to build reserves and resources for the next phase in our evolution.

We are continually referring to the changing legal profession. For our Board and volunteers in the various committees it is no different when helping with ALPMA as it is when sitting in our firms.

Sometimes it is difficult to see what is happening out there because we are too busy working on the 'now'. As we turn into the final year of our current three-year strategy (2015-18) we must, as an Association, step back and plan for where we want to be at the end of the next strategic cycle in 2020 and beyond.

At every turn the competitive landscape in the practice management space gets more crowded. There are offerings which are simply more of the same and there are offerings which really do cause us to take note.

To be responsive to a changing member dynamic – just how different will our member profile be in three years' time? – is our greatest challenge, but it is also our greatest opportunity.

As we speak of our members we can also relate to our partners. They provide tremendous support to ALPMA but also great insight and industry perspective which is often only seen through leveraging their key relationships. I thank our partners and look forward to extending the relationship for years to come.

PRESIDENT'S *Report (cont.)*

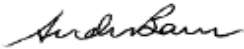
We have great volunteers across ALPMA. Every time an opening appears we have a wonderful new person stepping in to share their perspective and experience. The next wave of volunteers we hope will bring the drive and the necessary refresh needed for the next exciting phase. I hope this might be you!

This 2016-17 annual report sets out a 'year in review' for ALPMA. Not only do we present the financial statements for the members but we also hope the report captures a snapshot of what ALPMA delivers annually.

We are much more than Summit. We are much more than the monthly practice management seminars. We are committed to our promise to members and that will remain as our primary focus. We are very proud of our 2016-17 year and acknowledge that such a year is not possible without the contributions of our team of volunteers, contractors and partners. On behalf of the Board I thank all those who contributed to 2016-17.

In closing, this will be my final annual report as ALPMA's President. I have enjoyed (nearly) every minute of

this and have not only enhanced many professional relationships but also developed many more friendships as well. We have a great thing going with ALPMA and I thank all those who I worked with to keep our Association moving forward.



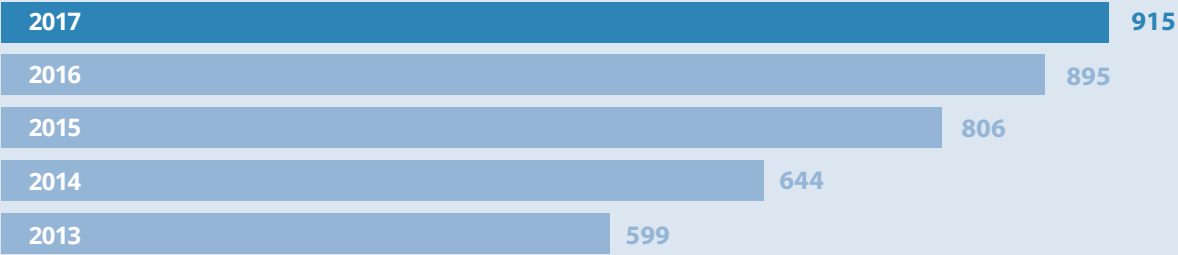
Andrew Barnes
ALPMA President



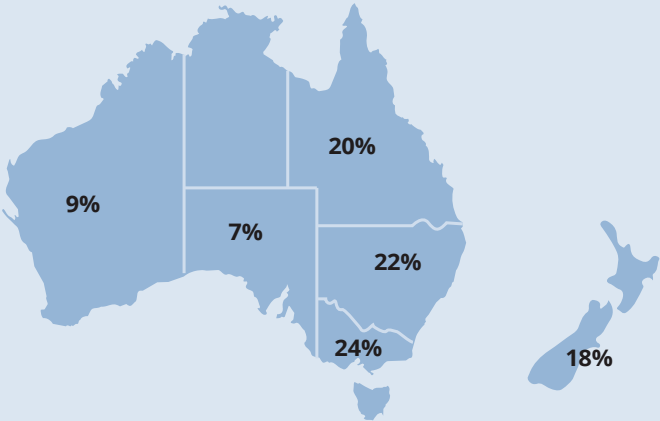
GROWING *our membership*

ALPMA continues to thrive with total membership reaching 915 at 30 June 2017. Most branches recorded growth in membership with the newly formed WA and New Zealand branches reporting greater than 10% growth during the year.

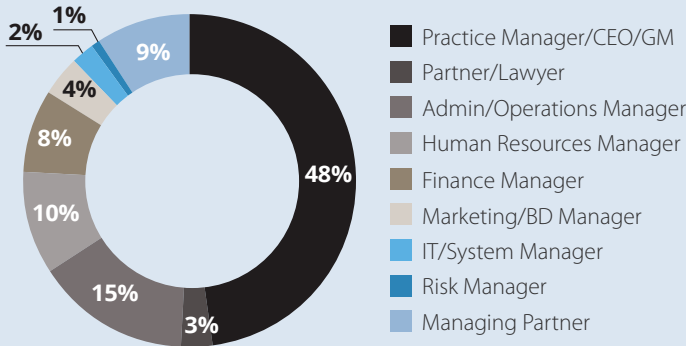
Membership growth



Membership by location



Membership by role



Membership by firm size



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*

Learning & Development

It has been another busy year of delivering an outstanding professional learning and development program for ALPMA members. In FY17, ALPMA:

- Held 60 practice management seminars in Sydney, Melbourne, Brisbane, Perth, Adelaide, Auckland, Christchurch and Dunedin. These continue to be the mainstay of our learning and development program, and very well supported by members and our corporate partners.
- Ran five webinars and three live-streamed events (delivered online and at host venues) as part of our innovative Leading Your Firm program for smaller and regional firms, generously supported by Thomson Reuters.
- Added 62 new recordings to the ALPMA On-Demand Learning Centre, making it the largest online learning resource dedicated to legal practice management in the Southern Hemisphere. ALPMA members can now watch more than 350 seminars on-demand for free, providing support and expert advice on a broad range of topics, when it is needed.
- Conducted five webinars on the results of our legal industry research program and showcasing the winning project from our Thought Leadership Awards.

This year, we have been working hard behind the scenes, consolidating our learning and development systems and content to prepare for the introduction of a new learning management system, which will enable us to provide new online learning programs to members from FY18 onwards.

DELIVERING *on our promise to members*



2016 ALPMA SUMMIT

*More than 325 delegates
and 50 trade exhibitors
attended the
2016 ALPMA Summit
'A Blueprint for Change'
from 7 - 9 September
at Etihad Stadium in
Melbourne - smashing
previous records.*

The 2016 ALPMA Summit focused on delivering the practical 'how-to' advice members need to successfully implement the people, process and technology changes required to keep firms competitive in a rapidly evolving legal landscape.

Generously supported by Principal Partner, InfoTrack, the action-packed program included international thought leaders Ron Baker and Dr George Beaton, US change management guru Steve Wingert, Australian legal innovator Matthew Burgess, former Australian military officer and LGBTI advocate Catherine McGregor AM, plus law firm leaders from Moores,

Connect Law, Carroll & O'Dea Lawyers, Coleman Greig Lawyers, Piper Alderman, Allens, Carter Newell...and many more!

The pre-Summit workshops on project management and leadership/change management were popular, as was throwing the doors of the Trade Exhibition open earlier on the Wednesday afternoon.

We thank our major Summit Partners and Trade Exhibitors for their contribution to making our Summit the biggest Legal Trade Exhibition in the southern hemisphere.

BECOMING *the Authoritative Voice*



Thought Leadership Awards

The ALPMA Thought Leadership Awards shine a light on new initiatives being conducted by firms across the legal sector in response to the changing legal landscape and provide well-deserved recognition for innovative firms and legal departments.



***ALPMA/LexisNexis
Thought Leadership
Awards -2016 Winner***

Congratulations to the 2016 ALPMA/LexisNexis Thought Leadership Award winner, Maddocks for their innovative, rigorous approach to implementing flexible working, and Award finalists, Bytherules Conveyancing, Hall & Wilcox and Nexus Law Group.

BECOMING *the Authoritative Voice*

ALPMA Legal Industry Research

ALPMA's strong research program focuses on providing members with insights to help them successfully lead and manage their firms in a changing legal landscape. In FY17, ALPMA conducted the following research in conjunction with our research partners:

- ALPMA Australian Legal Industry Salary & HR Issues Survey, supported by In2view, IPA, Kaleidoscope Legal Recruitment and kbe human capital. The 2017 survey was enhanced to include extended information on performance benefits and bonuses and key staffing ratios to assist with measuring firm productivity and performance.
- ALPMA/McLeod Duminy New Zealand Legal Industry Salary & HR Issues Survey
- ALPMA/Crowe Horwath Australian and New Zealand Legal Industry Financial Performance Benchmarking Studies

- 'Referrals & Cross-Selling In Practice' ALPMA/JMA Marketing & Business Development Research
- ALPMA/InfoTrack 'A Blueprint for Change: How Law Firms are Adapting to the Changing Legal Landscape'.

ALPMA also supported the inaugural CXINLAW research into customer experience at law firms 'No Second Chance – The Importance of First Impressions to Law Firms.'

ALPMA Blog

The ALPMA blog "A Survival Guide for Legal Practice Managers" provides a weekly source of opinion and advice on the business of law from leading industry experts delivered direct to the inbox of 1600+ ALPMA members and subscribers.



DEVELOPING *New Markets and Strategic Relationships*

Regional Law Firm Management Forum – Singapore

“Change: Technology Enables, People Deliver”

In FY17, ALPMA deepened its relationship with the Australasian Law Management Group (ALMG) of the Law Council of Australia, signing a formal MOU for closer collaboration on matters relating to legal practice management. This collaboration includes regular meetings between board members to discuss issues of importance for law firm leaders and the co-hosting of the Regional Forum in Singapore.

In November 2016, ALPMA held its first event in Singapore, in conjunction with the ALMG.

The Regional Law Firm Management Forum – Singapore brought together a vibrant and authoritative blend of Singaporean and Australian thought leaders to discuss how law firms can embrace the opportunities presented by an incredible array of new technological advances from the investment decision to a change management mindset. Thanks to Law In Order, BigHand, Chrome River, Nikec, Nuance and Lexis Nexis for their support of this event.

ALPMA also continued to enjoy a close relationship with the College of Law, focused around practice management education, and with the Queensland Law Society, who provide the venue for ALPMA's monthly practice management seminars in Brisbane as part of its Alliance partnership with ALPMA. In November 2016, ALPMA board members presented at the annual meeting of State Law Societies and we continue to explore opportunities to work more closely with local Law Societies on matters of mutual interest.

DEVELOPING *the Association*

ALPMA is committed to ensuring that we provide the best possible experience to members while building a sustainable Association in an ever-changing competitive landscape.

Resources Review

The legal profession and the industries that support professional services are experiencing rapid, constant change. Legal profession member associations globally have been reviewing and adopting changes to help support the profession with these changes.

To ensure that ALPMA continues to meet its promise to members and partners to be a forward-thinking, adaptable, strategic contributor to the profession, we have undertaken a large body of work over the past 12 months in reviewing ALPMA's structure. This change will ensure that we keep in step with the changes to the profession, and continually evolve to provide high-quality support and services to legal practice managers.

The appointment of an Executive Director will provide a strategic link between ALPMA's administration and management team and the Board.

For our members, we want to be more responsive to drivers from the market – we want to increase our just in time learning to be available 24/7. Changes within this area will see us delivering content tailored to your role to meet your firm's needs and address the hot issues hitting your desk today.

For our partners, we see the new Association model as being able to deliver a more customised offering to match your brand's objectives. ALPMA acknowledges the competitive market for sponsorship dollar and our responsibility to remain agile.

We see our partners getting a higher return on investment with increased possibilities for market penetration from ALPMA's membership growth both here and in South East Asia. There has never been a more exciting time for ALPMA, its members and partners!

Technology Review

ALPMA engaged the services of an external IT company during the year to review our current systems and platforms and recommend a new operating structure to enhance the customer experience while reducing administrative processes and streamlining operations. This investment will see the roll-out of an automated and integrated website and platform that will put ALPMA at the forefront of resources for Legal Practice Managers.

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 at 30 September 2017



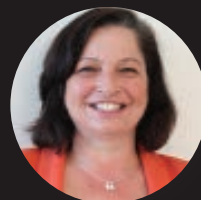
President

Andrew Barnes
Chief Executive Officer
Sladen Legal (VIC)



Vice President & Risk Compliance

Dion Cusack Corporate
Services Manager
K&L Gates (VIC)



Treasurer

Begonia Silvestre
General Manager
Hunt & Hunt (VIC)



Company Secretary

Valmai Vickers
Practice Manager
Ryan Carlisle Thomas (VIC)



Director of Education

Jane Ritchard*
(NSW)



Director of New Projects

Tobias Crush
Finance Director
Piper Alderman (SA)



Director

Emma Elliott
Business Manager
Steinepreis
Paganin (WA)



Director

Emily Mortimer
Human Resources Manager
Piper Alderman (SA)



Director

Mark Beale*
General Manager
Malley & Co (NZ)



Director

Mark Wiggins*
General Manager
Griffiths Parry (QLD)

* Directors appointed from November 2016 | Directors until November 2016 not pictured: Mary Hockaday, Mary Hockaday Consulting (QLD)
Sheryll Carey, General Manager, Lowndes Jordan (NZ), - Director | Carey Waterworth, General Manager, Bennett & Philp (QLD)

ALPMA Team



Volunteers

ALPMA has over 60 member volunteers who generously given their time to branches, committees and working groups.

We currently have branches in VIC, NSW, QLD and SA. Our WA and NZ groups also became formal branches of ALPMA during the year. Each branch includes up to 10 members who drive programs at the local level.

The National Learning & Development Committee is made up of nominated representatives from the Branch Committees and oversees the development and implementation of the L&D program for ALPMA. The Summit Committee is formed each year to plan the ALPMA Summit.

We would like to thank all of our volunteers for generously giving their time and for their significant contribution to ALPMA.

Contractors

ALPMA operates as a virtual association and is managed by a dedicated team of contractors operating nationally and locally. There were several changes to our secretariat team this year, and we sincerely thank everyone for their contribution to ALPMA. A special mention to Kerrie Billings, who we farewelled after more than 15 years' outstanding service to the Association.

ALPMA *Branch Reports*

Victoria

The ALPMA VIC Branch had an exciting year with the introduction of two new round table discussion groups for Small Firm Managers and Risk Managers, generously supported by Infotrack. Both groups met four times throughout the year and delivered a varied program with both guest speakers and specific topic based discussions. Members valued the opportunity to meet people in similar jobs and ask questions to assist them in their roles.

The VIC lunchtime practice management seminars continue to be well attended and the feedback on content is positive. With 11 corporate sponsors in FY17, the VIC Branch hosted 11 seminars during the year, including one breakfast seminar, utilising both presenter and panel formats.

Queensland

The Qld committee continues to offer a Practice Managers (PM) Group Forum, directed to small and mid-tier firms on a quarterly basis. This PM forum continues to be well attended and there is a deep level of connection among the group with quite a bit of cross sharing and support now occurring outside of the meetings. The Committee is keen to introduce other forums directed at different levels of employees in law firms – to help build their skills in practice management. The Brisbane CEO group continues to grow with topics initiated by the group such as roll out of redundancies, wage increases and incentive schemes.

An area of growth identified is student members and introduction of young, innovative minds to the ALPMA network to add a different perspective and new energy. In 2017/2018 the Qld Committee looks forward to strengthening existing relationships and identifying new ones. The Committee is excited to have Summit in Brisbane and look forward to welcoming members to the sunshine state.

New South Wales

The NSW practice management seminars were well received during the year with continued high attendance. The ALPMA NSW Branch Committee was strengthened with the recruitment of three new members to join our current hard-working committee. The Committee is working hard on delivering high level and diverse topics to cover the needs and interests of all members.

In FY18, the NSW Branch will see the introduction of new Practice Management Group sessions to further promote networking and information sharing among local members.

ALPMA *Branch Reports*

South Australia

The ALPMA SA Branch has continued to provide members with a high-level learning and development program. There have been many highlights including a successful workshop lunch on 'Influencing your Partnership' presented by Sally King, Director of Strategic Communication & Business Development at Caroll & O'Dea Lawyers, and a very well received and attended breakfast briefing from the BankSA Chief Economist, Besa Deda.

The SA Committee also conducted a survey around gift giving for staff and office closure periods that was presented at our end of year event.

Western Australia

This year, ALPMA WA successfully completed its first year operating as a full Branch of ALPMA and continues to go from strength to strength with an increase in the number of events from six to more than 10 per year. The WA event calendar includes ALPMA's flagship lunchtime practice management seminars, workshops, networking events, corporate golf days and Careers Fairs.

In FY17, the WA Branch also successfully launched its Practice Management Breakfast Forums, which provide an ideal way for Practice Managers to network, share information and discuss hot topics and current issues.

New Zealand

The ALPMA New Zealand Branch held its inaugural Annual Branch Meeting in August 2016. The NZ committee is excited to be part of the ALPMA network, continuing to expand across Australasia and the Pacific.

Key to growth in NZ is the legal networks offering ALPMA membership as a benefit to their members. Strong relationships have been built with Lawlink, LawPlus, NZ Law and the NZ Law Alliance networks to offer ALPMA membership to the Practice Managers in their member firms.

In FY17, the NZ practice management seminars alternated between Auckland and Christchurch, and the committee plans to hold a PM seminar in one other city each year. NZ also held its first Christmas lunch in Auckland and networking drinks in Christchurch, and conducted a survey about Christmas gifts and Christmas celebrations in members' law firms.

OUR PARTNERS

We value the strong relationships we have built with our FY17 partners and thank them for their support, which allows us to continue to deliver our services to members.

AUSTRALIAN CORPORATE PARTNERS



The logo for legalsuper, featuring a yellow square icon with a white 'L' and the word "legalsuper" in black lowercase letters.



STATE CORPORATE PARTNERS

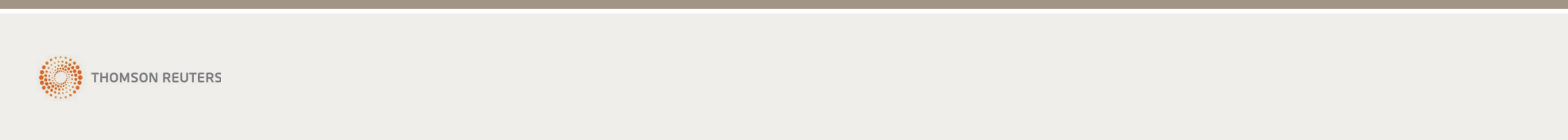


OUR PARTNERS

NEW ZEALAND CORPORATE PARTNERS



LEADING YOUR FIRM PARTNER



MAJOR SUMMIT PARTNERS



FINANCIAL *Summary 2016-17*

ALPMA made a trading profit of \$155k in the 2016/17 year which was predominantly due to a very successful 2016 Summit. The significant movement in receivables and conference in advance was due to a change of Summit contractor for the 2017 Summit. With the new contractor, they manage, hold and control all funds, with the net amount being distributed to ALPMA at the end of the 2017 Summit.

The ALPMA Board remains committed to ensuring strong, growing reserves. With significant projects on the horizon, especially with respect to new technology solutions and a new resourcing framework, the Board is pleased with the reserve level reported at 30 June 2017.

ALPMA is a not-for-profit company limited by guarantee. ABN 30 094 240 981

The full ALPMA financial report for the year ended 30 June 2017 is available at www.alpma.com.au/My-Membership

	2017	2016	\$ Var	% Var	
Cash at Bank	718,080	775,859	-57,779	-7%	
Receivables	106,953	278,257	-171,304	-62%	
Income in Advance	426,555	496,580	-70,025	-14%	
Conference in Advance	20,178	234,663	-214,485	-91%	Change of contractor means that they hold the funds for the 2017 Summit until final settlement
Members Funds	330,572	175,379	155,193	88%	
Gross Income	1,572,252	1,474,374	97,878	7%	
Operating Expenses	1,417,059	1,439,703	-22,644	-2%	
Surplus/(Deficit)	155,193	35,031	120,162		

