

ALPMA

Annual Report 2017 - 2018



ALPMA. *Adding Value to the Business of Law.*

The Australasian Legal Practice Management Association, (ALPMA), is the peak body representing business executive managers and lawyers who perform a legal practice management role.

ALPMA provides an authoritative voice on issues relevant to legal practice management across Australasia. 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, innovation 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.

This year has been another great year for ALPMA. Not only did we continue to hold many great seminars and events across Australia, New Zealand as well as Singapore, but in doing so we increased our operating surplus and cash reserves against the prior year. This is an important strategic achievement, because in achieving this, we are now stronger and can invest more in delivering you greater value for your investment as an ALPMA member.

This year saw us turn a corner, coming out of the 2015-18 strategic plan period. It is great to see that many key objectives have been achieved, or are well on the way to being achieved.

Two of the major initiatives were the resources review, examining the Association's structure and our IT project, examining our IT platforms, to ensure readiness for the future. Both projects have been a significant, ongoing body of work during this period, with the outcomes soon to be realised.

Earlier in the year the board met over a weekend to develop the road map which will set up our strategic direction for the next three years. As such we have identified a number of new and exciting initiatives to deliver in the future.

The landscape upon which we operate is only continuing to be more and more competitive. We therefore will seek opportunities to drive greater value for our stakeholders by creating deeper alliances.

This means developing strategic partnerships with likeminded individuals and organisations to become an Association of associations. Because of this focus we are extremely proud and excited to have signed a memorandum of understanding with the College of Law. These initiatives will not only help to increase educational efforts as to the business of law but will also increase the value and standing of ALPMA members in the roles they hold, as management professionals within firms. We know that we must remain relevant and to that end we will be more vocal by speaking up on your behalf on the issues that matter to you and your firm.

PRESIDENT'S *Report (cont.)*

We will explore more opportunities to create deeper alliances and friendships with organisations that can create greater value or opportunities for you.

Given that ALPMA is your organisation, we want to encourage our members to get involved. We have great opportunities to volunteer at national and state levels, as well as on individual projects, so urge you reach out if you want to become involved.

I would like to take this opportunity to thank and congratulate Andrew Barnes, immediate past president.

As Andrew stands down from the board at this year's AGM, I am sure that you will all agree with me that Andrew can look back upon his time leading ALPMA and be proud of all that he and the Association have achieved under his stewardship.

There are quite simply too many achievements to list. So thank you Andrew.

On a personal front I'm excited for the next 3 years ahead at ALPMA. As an association focused on the future, I'm looking forward to leading the Association on its pathway forward.

Finally, on behalf of the board, I would like to send our very sincere thank you to our partners, who support us throughout the year, our contractors and staff who do an amazing job as well as the army of volunteers who make us what we are and of course to all our members. We are a community of kindred spirits that gets stronger year on year.



Dion Cusack
ALPMA President



GROWING *our membership*

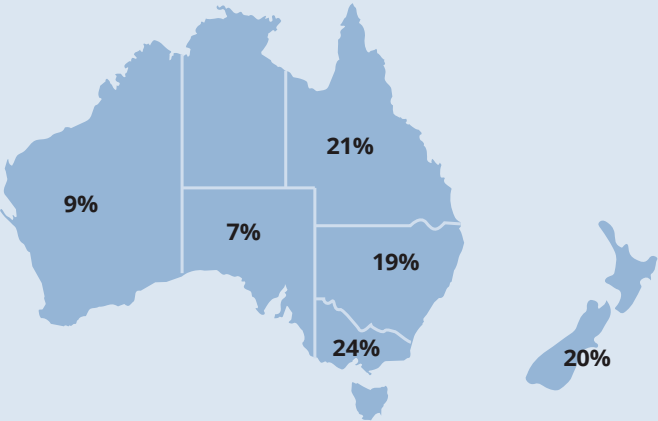
ALPMA's membership reduced slightly for the 2017-2018 financial year, finishing at at 888 members. The membership saw the most growth, by role, in the Partner/Lawyer and Admin/Operations Manager positions this year.

Small Firm's continue to be a large contingent for ALPMA's membership base, with 74% of members working in firms with 1-24 people.

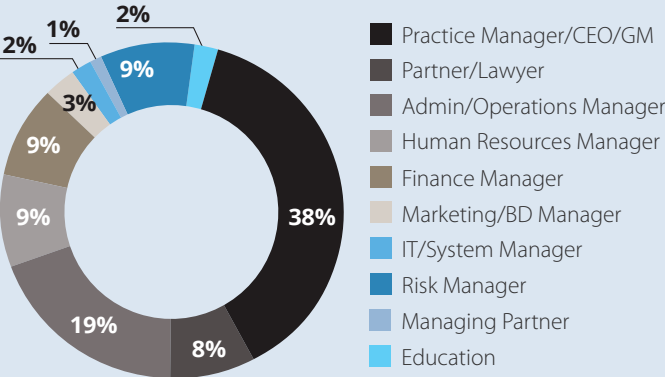
Membership growth



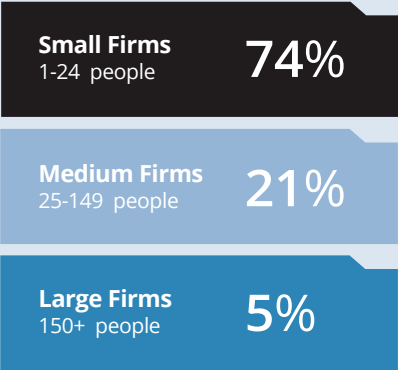
Membership by location



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 FY18, ALPMA:

- Held 60 practice management seminars in Sydney, Melbourne, Brisbane, Perth, Adelaide, Auckland, Christchurch and Hamilton. These continue to be the mainstay of our learning and development program, and very well supported by members and our corporate partners.
- Ran 10 webinar events, with four of these webinars being live streamed from various states, throughout the year. The webinar series continues to be an increasingly popular avenue for content delivery to our membership.
- Added 73 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 a one day Pricing Workshop in Christchurch and a HR Workshop in VIC.
- Conducted four webinars on the results of our legal industry research program and showcasing the winning project from our Thought Leadership Awards.

DELIVERING *on our promise to members*



2017 ALPMA SUMMIT

*More than 329 delegates
and 48 trade exhibitors
attended the
2017 ALPMA Summit
'Sailing the 4 C's' from
13-15 September 2017 at
the Brisbane Convention
and Exhibition Centre.*

The 2017 Summit was all about how to develop and apply the four key 21st Century learning skills (as identified by the influential P21 organisation) to drive innovation and ensure firms flourish in the transforming legal landscape.

Generously supported by Principal Partner, InfoTrack, the action-packed program included Rod McGeoch, leader of Sydney's successful 2000 Olympic bid, Chief Economist Nicki Hutley, corporate anthropologist Michael Henderson, international thought leader Timothy Corcoran and Judy Anderson from Inventium plus law firm leaders from Lawyers On Demand, Helix Legal, View Legal, Henry Davis York, Brisbane

Family Law Centre, Kit Legal, The Fold Legal and Piper Alderman, along with well-known thought leaders across the legal industry.

The pre-Summit workshops on Building an Innovation Framework in Law Firms and Personal Productivity in the 21st Century Workplace were popular, as was opening the doors of the Trade Exhibition 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 - 2017 Winner**

Congratulations to the
2017 ALPMA/LexisNexis Thought
Leadership Award winner, Mills Oakley
for their 'shark-tank style' Innovation
Accelerator for legal start-ups, and Award
finalists, Bannermans Lawyers, Proximity
and Legal Economy.

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 FY18, ALPMA conducted the following research in conjunction with our research partners:

- 2018 Australian Legal Industry Salary & HR Issues Survey, supported by In2view, u&u Recruitment Partners, Carlyle Kingwood Global and KBE Human Capital. The 2018 survey was further enhanced to include extended information on performance benefits and to provide increased transparency on remuneration ranges across numerous practice areas and states.
- 2018 ALPMA/McLeod Dumity New Zealand Legal Industry Salary & HR Issues Survey.

- ALPMA/Crowe Horwath Australian and New Zealand Legal Industry Financial Performance Benchmarking Studies.
- ALPMA/InfoTrack '2017 Summit Research: 21st Century Thinking at Australasian 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*

In FY18 ALPMA continued to build on the efforts of prior boards to further enhance its' strategic relationships.

Across the year ALPMA has:

- Strengthened its collaborative relationship with the Association of Legal Administrators (ALA) by having Executive Director, Oliver Yandle, facilitate the National Board strategic retreat in Melbourne. This followed an invitation extended by Dion Cusack when he, together with past-president Andrew Barnes and Summit Co-chair Ann-Maree David, were guests of ALA at their annual convention and exhibition in May. Oliver and ALA President April Campbell subsequently attended Summit in Sydney in September.
- Extended its tenure in Singapore with the second Regional Law Firm Management Forum held in December 2017. This was again in conjunction with the Law Council's Australian Law Management Group.

The event was recommitted to a third forum, in October 2018, where ALPMA's standing was enhanced when Singapore Academy of Law became Knowledge Partners and the Law Society of Singapore actively supported our initiatives.

Our partners contribute and collaborate with us on this event and we thank them for their continued support.

- Strengthened our relationship with the College of Law to develop initiatives that will provide additional education and standing to law firm business management. In 2018 ALPMA entered in to an exciting venture by signing a Memorandum of Understanding (MOU) with the College of Law. The first initiative undertaken within this MOU was to support the College of Law's development of the Master of Legal Business. Fiona Crowell, ALPMA's Learning & Development Manager, has been appointed to the program board for the College of Law's Legal Business Management course.

Neville Carter, Chief Executive Officer of the College of Law has joined the ALPMA board in 2018 as a guest and will continue in this role in FY19. This is a great development in the pathway forward to increase the education and standing of those in legal business management roles within law firms.

The Queensland Law Society continues to provide a venue for ALPMAs monthly practice management seminars in Brisbane as part of it's Alliance partnership and the board is continuing to explore other opportunities to work more closely with other 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

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 24 months in reviewing ALPMA's structure. These changes, which came into effect in July 2018, ensures that we keep in step with the changes to the profession and the industry as a whole. By the end of 2018 this structure will be finalised to ensure ALPMA can continually provide high-quality support and services to our members and legal practice managers.

Members and Partners

For our members, we understand the need 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 Sout 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 at the beginning of FY18 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 project continues to gain traction and momentum with a large body of work being undertaken already. 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.

Collaboration with Members

ALPMA will actively be seeking opportunities to collaborate on new initiatives that; benefit our members, furthers education in the field of law firm management and/or improves the legal industry as a whole. As such there will be additional opportunities for members to get involved in the coming year. ALPMA recognises the largely untapped skillset of our members and will seek ways to engage with members further this coming year.

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 2018



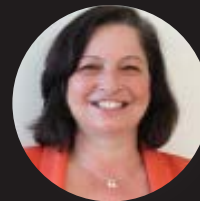
President

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



Vice President

Mark Wiggins
General Manager
Hall Payne Lawyers (QLD)



Treasurer

Begonia Silvestre
General Manager
Hunt & Hunt (VIC)



Company Secretary

Nikki Rollason
Legal Project Manager
DLA Piper (WA)



Director of Education

Jane Ritchard
Financial Controller
Clifford Chance (NSW)



Director

Emily Mortimer
Human Resources Manager
Piper Alderman (SA)



Director

Mark Beale
General Manager
Malley & Co (NZ)



Director

Sam Sofianos
Colin Biggers
& Paisley (VIC)



Director

Debra Fillipin*
Head of Development
Asia Pacific
Pinsent Masons



Board Guest

Neville Carter
Chief Executive Officer
The College of Law

* Directors appointed from November 2018

Directors until November 2018 not pictured: Andrew Barnes, Chief Executive Officer Sladen Legal (VIC) | Tobias Crush Piper Alderman

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, SA, WA and NZ. Each branch has up to 10 local committee members who drive L&D programs and other initiatives 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.

Employees and Contractors

ALPMA operates as a virtual association and has been largely managed by a dedicated team of contractors operating both at the national and local level.

The resources restructure project saw ALPMA first employee commence in July 2018. This is an important first step in the future structure of ALPMA moving forwards.

There were several changes to our contractor team this year, and we sincerely thank everyone for their contribution to ALPMA. A special mention to Connie Finestone who we farewelled after seven years of service.

ALPMA *Branch Reports*

Victoria

The ALPMA VIC Branch has continued to operate with a vibrant and engaged group of committee members. Our committee has presented a broad variety of speakers and topics in its learning and development program for both the lunchtime seminars and roundtable discussions. Feedback has been positive from our members, guests and sponsors and they have appreciated the timely reports on culture and law changes.

The Small Firm Managers Group and Risk Group roundtable discussions have been particularly well received by members. Some notable seminars include: Authentic Leadership, RU OK?, Design Thinking, AML, Notifiable Data Breach and Client Experience Excellence. The seminars have included panel presentations as well as individual speakers.

The VIC committee has introduced new ideas and slight changes to the presentation format. We are enjoying the use of a new venue owned by our new Alliance Partner, Pitcher Partners in Docklands especially as we move towards a more interactive workshop style for our seminars.

Queensland

The QLD committee have maintained their focus on ensuring that every Qld member can benefit from the resources that ALPMA offers. We have continued to deliver our Practice Managers Group Forum on a quarterly basis and in addition to receiving consistent feedback about its value, we are finding the forum is a great way to sound out potential speakers for the monthly seminars. This initiative has been templated and rolled out on both the Gold and Sunshine Coasts.

We continue to develop a strong relationship with The Qld Law Society, we welcomed Rolf Moses, QLS CEO, as a guest at our August committee meeting. We have also welcomed three new committee members with valuable and diverse skills and networks. Terri Mottershead from College of Law, Susan Comerford who is a long standing member of ALPMA and who previously served on the SA Committee and Sheila Kushe, Professional Development Manager at QLS.

This will support our goal to continue to seek opportunities that will benefit our members. The Qld branch continue to develop strong relationships with our long standing Corporate Partners and we value their support and contribution.

New South Wales

ALPMA NSW has had another successful year. The NSW Practice Managers' Breakfast Club was established in November 2017 and has held six meetings. They have been well attended and a welcome forum to discuss current issues faced by legal practice managers. The inaugural Regional Practice Managers' Networking Group was held in Newcastle recently. The committee is working towards setting up a virtual Practice Managers' forum for our many regional members.

NSW was fortunate to be able to host some excellent learning and development lunchtime seminars. There was an interesting panel discussion on the benefits and challenges of pro bono work in law and presentations on pertinent issues like cyber security, influencing skills and understanding your customer's experience.

ALPMA *Branch Reports*

Western Australia

This year, ALPMA WA settled into its second year as a full Branch of ALPMA, with the objective of consolidating and building stronger relationships with its Members, Partners and alliance groups like the College of Law.

Initially started as an informal get together, the Practice Management Group Breakfast Forums now run every six weeks, often including a guest speaker or 'hot topic' for discussion.

WA also continued to deliver to its members an excellent L&D program with practice management seminars and networking events all well attended. WA's success could not be achieved without its hard-working, passionate and dedicated Committee who are constantly looking for business development opportunities to ensure its members are provided with the benefits and value of a highly professional association.

South Australia

The South Australian Executive designed and delivered a series of lunch workshops that were designed in equal parts to provide challenge to the status quo of the small to mid tier firm (the most common demographic of the South Australian legal market) and to provide tools that could be used immediately on return post workshop. This strategy has been one devised with our members in mind and has received excellent feedback to be continued in our 2019 program delivery.

South Australian members participated in their first 'hot topics' workshop delivered across all areas of expertise in the modern firm. This provided a great opportunity to share knowledge, contacts, lessons and successes.

We seek to sophisticate this offering as part of our 2019 program. Continuously wanting to deliver more to our members South Australia let the way Nationally with a survey to members for our end of year function to provide them information around the norms of festive gifting.

We were saddened to have Robyn Clissold and Angela Scarfo step down from their positions on the SA Executive as they pursued other opportunities. Their contributions to our success of member retention and satisfaction will be their legacy. We were joined by Russell Colbourne who has brought commerciality, pragmatism and smart wit to our committee and look forward to his long association with ALPMA.

ALPMA *Branch Reports*

New Zealand

The 2017/18 year has been one of consolidation for the NZ branch. We have a good programme of Practice Management Seminars in place in our main centres and we are starting to develop our reach throughout the country. We are working on creating opportunities for regional members to connect and network to gain the most from their membership.

To this end we have extended our flagship Practice Management Seminars to include not only Auckland and Christchurch but also Hamilton as a regular feature on our calendar.

We have also introduced a quarterly regional lunch meeting in Tauranga. Our members are responding well to these initiatives. And we hope to replicate this model in other regional centres in 2019.

One change that we made to our programme was the timing of the Salary Survey. After consultation with our members we moved the Salary Survey so that the results were available in March 2018, to coincide with year-end performance reviews. (31 March being a common balance date.)

Thanks to a collaborative approach within ALPMA, NZ Committee and new partners Survey Matters, the survey was well-received with over 100 participants. Our partners McLeod Duminy Careers presented a very insightful commentary on the industry at workshops in Auckland and Christchurch following the release of the report.

Once again our Christmas lunch in Auckland was the best attended event of the year. It is wonderful to see the collegiality of our members at an event like this.

We held our first ever one day workshop in March 2018. It was held in Christchurch with John Chisholm and David Wells travelling from Melbourne to speak about Pricing. The workshop was well received and the concept may be something we can do every 2nd year.

The New Zealand branch committee has enjoyed adding value to the business of law in NZ in 2017 – 2018 and we aim to further engage our members in active participation in all our resources in the coming year.

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



STATE CORPORATE PARTNERS



OUR PARTNERS

NEW ZEALAND CORPORATE PARTNERS



LEADING YOUR FIRM PARTNER



MAJOR SUMMIT PARTNERS



FINANCIAL *Summary 2017-18*

In the 2017/18 financial year, ALPMA reported an operating surplus of \$171,390. As is usually the case the strength of our surplus is determined by the success of the annual Summit. The 2017 Summit was a major contributor to the annual result for the year and the growth in Member Funds.

The 2015-2018 strategic plan set down an objective to grow reserves and provide a foundation for future investment in technology and other future-proofing solutions to enhance the member experience. The 2017/2018 result was therefore a satisfying outcome and the Board is pleased to report.

In challenging times the Board remains committed to our members and partners and to ensuring ALPMA continues to stay relevant in the future.

	2018	2017	\$ Var	% Var
Cash at Bank	694,087	718,080	-23,993	-3.3%
Receivables	25,561	106,953	-81,392	-76.1%
Income in Advance	224,530	426,555	-202,025	-47.4%
Conference in Advance	22,144	20,178	1,966	9.7%
Members Funds	501,962	330,572	171,390	51.8%
Gross Income	1,532,225	1,572,252	-40,027	-2.5%
Operating Expenses	1,360,835	1,417,059	-56,224	-3.9%
Surplus/(Deficit)	171,390	155,193	16,197	

