

ALPMA

Annual Report 2018 - 2019



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 leading voice in professional business management in Australasia.

Our Mission

To create, empower and elevate professional business management leaders in Australasia.

Our Values

Empowering, Collaborate, Supportive, Collegial,
Inclusive, Transparent

PRESIDENT'S *Report*



Dion Cusack
ALPMA President

The business of law is changing and so are we. Innovation, technology, new law, change and disruption are the themes of today. We are on a mission to disrupt.

To remain relevant, fresh, value adding to our members and the profession, we must be open and willing to challenge the status quo. The fact is, that just as each of our firms are being challenged in ways once unthought of, as an association, so are we.

The comforting point is that with the commitment of our members, partners and your highly skilled and dedicated board and committees, we are up for the challenge in these exciting times.

2018/19 has been a year of transformation and development and next year will be no different. Aside from business as usual in terms of the many seminars and events across Australia, New Zealand and Singapore, I am particularly proud to mention the following achievements and highlights of the year.

- The permanent appointment of Emma Elliott into the General Manager role. This is an exciting appointment for us given Emma's qualifications and skills, and an appointment that has already begun to deliver tangible returns in terms of deliverables and targets that Emma has achieved in a short time.

PRESIDENT'S *Report (cont.)*



- The establishment of various sub-committees to examine critical strategic initiatives i.e. IT review, governance and risk, membership and our market positioning. Each of these committees has been established with formal charters with at least one board representative. Of significance, is the tremendous show of support by members, who hold either a special interest in, or relevant qualifications that have put their hands up to join these committees.
- Our new website and membership portal is now live. Offering a more visually pleasing appearance and improved membership experience, it will result in improved back office efficiency, saving us money, that we will reinvest into further improving the membership experience and value.
- Another hugely successful Summit in Sydney and Forum in Singapore, both upon which grew in attendance on the year before.

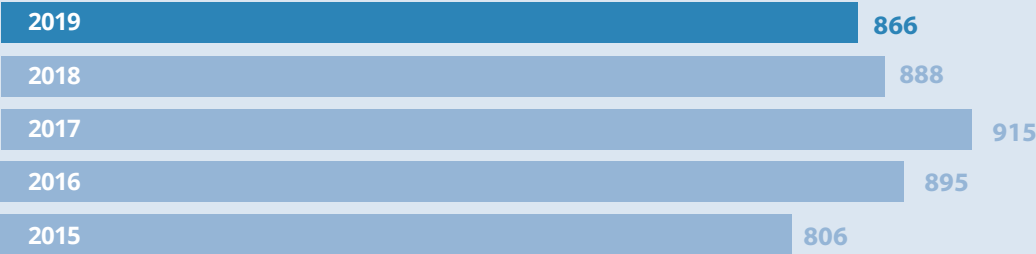
The board and I would like to say thank you to our partners, who support us throughout the year, our contractors and staff who do an amazing job, as well as the army of volunteers who make us what we are. And last, but not least, we thank you, our members, for being part of the community. 2019/20 is going to be a busy year, but together, we are stronger and can achieve so much more for our firms, and respective clients as well as the business of law.

GROWING *our membership*

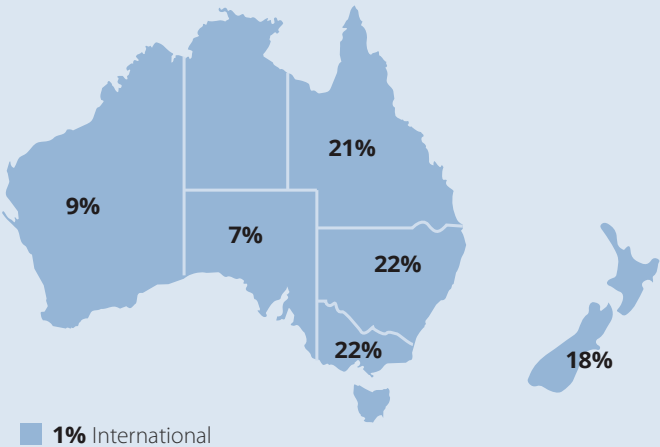
ALPMA's membership reduced slightly for the 2018-2019 financial year, finishing at 866 members. Whilst there was a decrease overall in memberships strong growth was seen in QLD, WA and NZ for the year.

Small Firm's continue to be a large contingent for ALPMA's membership base, with 60% of members working in firms with 1-24 people.

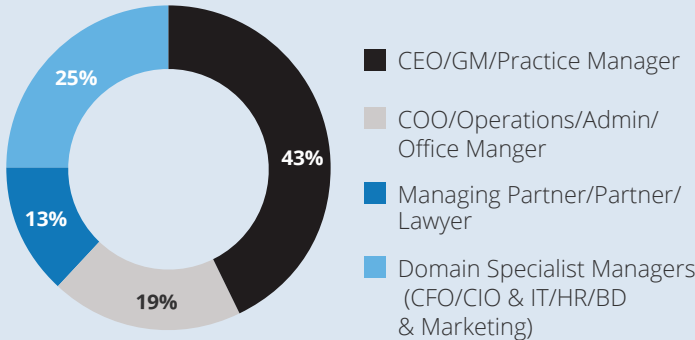
Membership growth



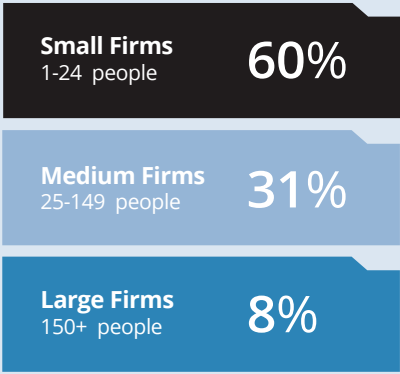
Membership by location



Membership by role



Membership by firm size



DELIVERING *on our promise to members*

Being a member of ALPMA will help you:

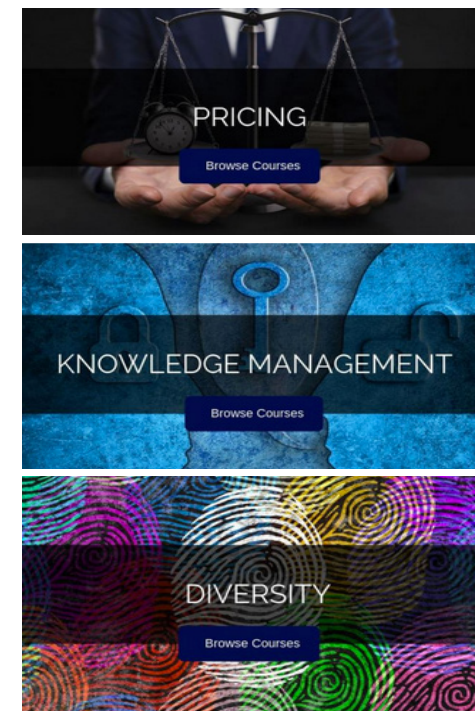
- **Develop** your core management skills
 - **Build** your knowledge across multiple professional domains
 - **Lead** your firm's development
 - **Connect and collaborate** with peers, experts & industry leaders
 - **Accelerate** your career progression
 - **Gain respect** as a legal practice management 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 FY19, ALPMA:

- Conducted 60 practice management events and seminars across ALPMA branches in Australia and New Zealand.
- Delivered HR Workshop in Melbourne.
- Held 11 webinars throughout the year which included a webinar showcasing the winning project from the 2018 Thought Leadership Awards. The webinar series continues to be a popular way to keep up to date in an increasingly time-poor industry.
- 50 On-Demand recordings added to the On-Demand Learning Centre. ALPMA members now have access to more than 250 seminars on-demand for free and we will continue to add new digital content to continue to grow our online learning capability.
- Conducted a 1 day workshop in Singapore - the 3rd year this workshop has been successfully conducted.



DELIVERING *on our promise to members*



2018 ALPMA SUMMIT

More than 560 delegates attended and 53 trade exhibitors were present at the 2018 ALPMA Summit “Firm of the Future” on 19-21 September 2018 at the International Conference Centre, Sydney

The 2018 ALPMA Summit was an inspiring three days of thought leadership consisting of seminars, workshops and networking that pivoted around the central topic of the “Firm of the Future”.

A broad range of high profile speakers shared their insights not only into what is happening in the legal space right now, but also what they believed the disruptors would be in the coming 5-10 years and most importantly how to plan for these changes. The program not only challenged delegates to think about how to achieve healthy profit margins for their firms today, but to think outside the box and start planning for healthy profit margins in the future.

Generously supported by Principal Partner, GlobalX, the action-packed program included Michael McQueen, Futurist and Author, Mark McCrindle, Social Researcher & Demographer Linda Murray, Executive Coach, Tim Williams and a huge arrange of dynamic and future forward speakers.

We thank our major Summit Partners and Trade Exhibitors for their contribution to making our Summit the biggest Legal Practice Management and 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 - 2018 Winner**

Congratulations to the 2018
ALPMA-LexisNexis Thought Leadership
Award winner, Adieu Legal, for their
Consensus Accelerator platform and
Award finalists, Lawyers on Demand;
LegalVision and Mills Oakley.

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 FY19, ALPMA conducted the following research in conjunction with our research partners:

- 2019 Australian Legal Industry Salary & HR Issues Survey, supported by In2view, u&u Recruitment Partners, Carlyle, Kingswood, Global and KBE Human Capital. The 2019 survey was further enhanced from previous years to include regional salaries, the inclusion of Patent Attorney salaries and additional parental leave information.
- 2019 ALPMA/McLeod Dumity New Zealand Legal Industry Salary & HR Issues Survey.

- 2018 Summit Research "Are you ready for the future?" - GlobalX and ALPMA partnered to ask over 200 law firms across Australia and New Zealand: "New technologies, systems and shifts in culture are pushing law firms and the legal industry to quickly adapt. But how agile are our businesses – and how prepared are we for these changes?"

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 FY19 ALPMA continued to build on the efforts of prior boards to further enhance its' strategic relationships.

Across the year ALPMA has:

- Continued to strengthen its collaborative relationship with the Association of Legal Administrators (ALA) by having their Executive Director, Oliver Yandle, and President, April Campbell attend the Summit in Sydney in September 2018. Dion Cusack and Andrew Barnes were guests of ALA at their annual convention and exhibition in May.
- ALPMA's third Regional Law Firm Management Forum, in conjunction with the Australian Law Management Group, was held in Singapore in October 2018. Attendee and firm representation numbers grew and we received stronger feedback on the program. The partnership with the Singapore Academy of Law extended our speaker content by adding Mark Cohen (@legalmosaic), a renowned US voice in what the future of law will look like.

We have a committed group of partners invested in the event and we continue to make key introductions to new business opportunities. Planning for the fourth event in October 2019 is underway in conjunction with the Academy, the Law Society and College of Law. 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, which was announced at the 2018 Summit Gala dinner.

Fiona Croswell, 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 was later appointed as a Director. 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.

Strategic Plan Approved

In May of 2018 the Board met to set the new three (3) year strategic plan to run from FY19-FY21. This strategic plan will ensure ALPMA remains at the forefront of professional practice management, whilst building the foundations for a sustainable Association for our members.

Technology Review

Throughout FY19 a significant body of work was done to update and roll-out to members a new membership platform. The Board are very happy to report this project has been completed with the launch of our new platform in August 2019. This new platform increases our ability to deliver member services, tailor content and increase our offering to members.

Mental Health First Aid Training

In order to be responsive to the market and members needs ALPMA launched a Mental Health First Aid Training course. This course allows members and those who work within the legal industry to access a Blended Mental Health First Aid training course through ALPMA at a discounted price. This new initiative is a great additional offering to not only our members, but the legal industry as a whole.

Collaboration with Members

Throughout the year ALPMA actively sought expressions of interest to join the newly formed committees, namely the IT Steering Committee, the Membership Development Committee and the Governance, Risk and Review Committee. These Committees have some exciting projects on their agendas. There will be more opportunities to engage with members in the coming financial year to advance ALPMA's purpose.

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 South East Asia. There has never been a more exciting time for ALPMA, its members and partners!

ALPMA Board

Board of Directors at 30 June 2019

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



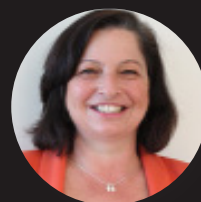
President

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



*Vice President
Director of Education*

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

Emily Mortimer
Human Resources Manager
Piper Alderman (SA)



Director

Mark Beale
General Manager
Malley & Co (NZ)



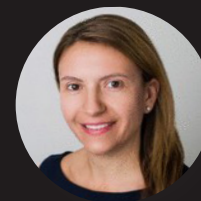
Director

Sam Sofianos
Colin Biggers
& Paisley (VIC)



Director

Neville Carter
Chief Executive Officer
The College of Law (NSW)



Director

Debra Fillipin
Head of Development
Asia Pacific
Pinsent Masons (VIC)



Director

Rebecca Jones
Finance and Operations
Manager
Catherine Henry Lawyers
(NSW)



Director

Jodi Proudlock
Chief Operating Officer
Meridian Lawyers (NSW)

ALPMA Team



Volunteers

ALPMA has over 70 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 is pleased to announce the appointment of Emma Elliott as the General Manager of ALPMA.

Whilst there were several changes to our contractor team this year, and we sincerely thank everyone for their contribution, ALPMA now has a dedicated team of employees and contractors operating both at the national and local level.

During the year Jillian Bowen has commenced as ALPMAs Digital Communications & Marketing Manager and joins:

- Fiona Croswell – L&D Manager
- Tanya Burns – Operations Manager
- Jo Hood – NSW & SA Secretariat
- Melanie Grace – VIC & NZ Secretariat
- Angelique Cooper – WA & QLD Secretariat
- Heather Connell – Bookkeeper

ALPMA *Branch Reports*

New South Wales

It's been a busy year in New South Wales with a big push on member engagement. Our bi-monthly Practice Managers Breakfast Club meetings in both Sydney and, especially, Newcastle have been well received with numbers growing steadily throughout the year, with the Newcastle meeting leading to some new regional members for ALPMA. Well done to Bec Jones for launching and driving that initiative.

The Learning & Development Committee has also developed a solid programme that has seen some strong attendances throughout the year, especially for some of the HR, BD and Trust/Finance topics. Pressure on attendances and member numbers continues however, with lots of CLE alternatives in the market and our own ALPMA digital offerings providing competition for the lunchtime seminars.

Still, our focus will remain on driving as much value and content as possible into the lunchtime seminars due to the networking and social aspects they deliver to our members and valued sponsors.

In New South Wales, as in other States, we are blessed to have such committed and energetic sponsors with each of them adding real value into our community through, not just their sponsorship dollars, but also through their attendances at our events and the constant stream of introductions to potential members throughout the year. We truly value their participation.

Finally, it would be remiss to close this report without singling out one individual on our State Committee who goes 'above and beyond' in terms of giving time and energy to ALPMA. 'C'mon down', Simon Dodwell (BD Executive, Piper Alderman).

Every month, Simon is either printing out name tags, running the sponsors banner around town, hosting a meeting or providing a venue. Thank you, Simon.

Thanks also to all of our other committee members who play a great role in making ALPMA New South Wales 'just work!' And, of course, thanks and 'safe travels' to our New South Wales Committee Chair, Jane Richards, who has taken a 'fun-cation' to spend six months cycling around Europe.

Victoria

FY19 has been a great year for Victoria with an effective and cohesive Branch Committee, working well together to put on a wide variety of events for our members. It has been our pleasure to continue to offer the popular monthly Practice Management seminars, along with our smaller interest groups – Small Firm Managers Group and Risk Managers Group meeting quarterly, and our annual HR Day.

ALPMA *Branch Reports*

It has been great to work more closely with our Partners this year, having them join us at our committee meetings. Particular thanks go to our venue partners – Pitcher Partners (PM Seminars) and Clarence Chambers (Small Firm Managers Group).

Our biggest success of the year would have to be our Networking Evening event that we recently held, with guest speaker Rob Stary. This was enjoyed by members and partners alike, particularly because it afforded an opportunity for networking over a drink. The members who attended are very keen to see this appear in the calendar for FY20.

Thank you to all our Partners, host venues and speakers in FY19. We look forward to planning an even more interesting FY20 with events spread over a variety of days and at different times of the day to cater for all the different needs of our members.

Queensland

The Queensland Branch Committee has enjoyed a year of energising and vibrant discussions, once again replenished with a team of diverse and accomplished leaders. By expanding the committee's experience beyond legal managers, we have been able to leverage new ideas and access different speakers, a rewarding outcome for the committee and for our members.

We have continued to strengthen our partnership with both the Queensland Law Society and College of Law, thanks in great part to representatives from both organisations being valued contributors within the Queensland Branch Committee.

Queensland Law Society CEO, Rolf Moses, presented to our members in April, sharing his extensive experience on influencing and driving change and a close contact of the College of Law, Melissa Lyons, presented a thought provoking and enjoyable workshop on Legal Design Thinking.

Both seminars were highly regarded and well attended. The quality and the variety of our seminars has been reflected in high levels of member engagement and positive feedback.

The Queensland Branch Committee is exploring expanding the successful Practice Management and CEO group models into specific management areas. The Brisbane legal IT managers meet sporadically and are open to having a more organised format, supported by ALPMA.

Our Practice Management group forums continue to be a favourite. The Brisbane gatherings are well attended and often attract speakers who we ultimately invite to present to the broader membership. In the last year, long standing Gold Coast members with the support of their firms, have dedicated time and energy to bringing local members together every two months with great success to provide an opportunity for practice managers to discuss the range of issues particularly facing regional firms.

ALPMA *Branch Reports*

Western Australia

Although small in number, the West Australian Branch Committee is a vibrant, hard working group who not only work to drive ALPMA locally, but who are also involved at a national level on the National Board, Governance, Summit, Learning and Development and Membership Sub-Committees. This representation ensures West Australia is involved in all aspects of ALPMA's decision making and strategic direction.

The West Australian Branch Committee welcomes back Lisa McCarthy and Rhea Wood who bring a wealth of experience and fresh ideas to the table. West Australia is also thrilled that one of our own, former Chair and Treasurer of West Australia, Emma Elliott is now ALPMA's General Manager and we are confident that Emma will continue with her passion and dedication to lead ALPMA into the future.

This year, West Australia hosted a number of joint events with alliance partner, College of Law. We also worked with our Partners to bring high profile speakers from interstate and all across the world to deliver first class, innovative presentations to our members.

Special interest group, 'WA Practice Management Group' continues to hold regular breakfast meetings to discuss 'hot topics'. The forum provides a vehicle to build strong relationships within the West Australian legal community and an informal mentoring program for all law firm managers.

The West Australian Branch Committee continues to explore new and innovative ways to actively raise the profile of ALPMA in West Australia, connect with members and Partners, deliver topical and thought-provoking L&D seminars, and host regular networking events throughout the year.

South Australia

The South Australian Branch Committee develops a plan in consultation with members from seminar feedback, anecdotal feedback and industry trends. Focusing the development of seminars on the balance of 'think global but act local' the seminar series presented opportunities to address challenges in the South Australian market as well as the broader industry trends. Following success of 2018 launch of Hot Topics seminar, the South Australian Branch Committee again allocated a lunch seminar to allowing members to workshop 'issues of the day' and reinforce the values of collective thought and a strong network that ALPMA membership provides.

The demographic of South Australian firms has many of our members working in isolated roles and our promise to members has extended to social events with after work catch up offered as part of the schedule of events.

ALPMA *Branch Reports*

Working closely with Partners throughout the year is an important objective of the South Australian Branch Committee who seek to provide members with the opportunity to understand tools and services available from our vendors to leverage solutions in the market. We have maintained transparency to attend South Australia Branch Committee meetings and have continued to offer opportunities for short presentations as part of lunch seminars.

The South Australia Branch Committee has been active contributors to the development of the South Australia and have demonstrated great continuity with only the regretful departure of Kaye Smith as Committee Member who sat as a Committee member from October 2015 to December 2018. Kaye's legacy was her strategic approach to engaging senior members of the profession in the advancement of legal operations management.

In 2020 the South Australian Branch Committee looks forward to collaborating with other Branch Committees to bring South Australian members keynote speakers that will empower them to deliver change to their firms.

New Zealand

AML has dominated the Practice Management world in New Zealand over the past 12 months. This has greatly impacted all law firms in New Zealand. We have worked hard to help our members learn more about this and navigate their way through these confusing compliance issues.

We have held multiple events across the country to help prepare members for the implementation and now the audit process. We have worked hard to provide a high standard of advice and support for our members.

The New Zealand Branch Committee is also pleased that we now provide ways for our regional members to connect with each other. We are developing a calendar of quarterly lunch meetings in the regional cities that have concentrations of members.

The highlight of this year was our highest ever attendance at Summit in Sydney. This was thanks, in part, to our relationship with the legal management group Law Alliance New Zealand. Everyone who attended Summit came away inspired and educated with knowledge to help them create the firm of the future. Congratulations to the Summit committee for pulling together an inspiring programme.

OUR PARTNERS

We value the strong relationships we have built with our FY18 partners and thank them for their support, which allows us to continue to deliver our services to members.

Australian Corporate Partners



State Corporate Partners



New Zealand Corporate Partners



FINANCIAL *Summary 2018-19*

The 2018/2019 financial year saw a surplus of \$2,073 for ALPMA. This surplus was much smaller than the previous 2 years mainly due to ALPMA's investments in resources and IT systems that will enhance our members and partners experiences.

This small surplus also accounts for a \$50,000 loss that is still outstanding due to the cyber breach incident that occurred in February 2019. Whilst we have been able to recover \$30,000 so far the remaining \$50,000 is still outstanding and not covered by our insurance. This is part of an ongoing investigation in which ALPMA hopes to fully recover the loss, in the meantime ALPMA is doing everything possible to try and ensure that this does not happen again.

	2019	2018
Cash at Bank	511,724	694,087
Receivables	159,864	25,561
Income in Advance	184,548	224,530
Conference in Advance	22,263	22,144
Members Funds	504,035	501,962
Gross Income	902,705	1,532,225
Operating Expenses	900,632	1,360,835
Surplus/(Deficit)	2,073	171,390

