



ALPMA
Australasian Legal Practice
Management Association

ANNUAL REPORT 2021 - 2022



ALPMA
Australasian Legal Practice
Management Association

ALPMA.

Adding Value to the Business of Law.

The Australasian Legal Practice Management Association, (ALPMA), is the peak body representing business executive managers and leaders who occupy legal practice management positions within Australasian law firms. 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, human resources, facilities and operational management, marketing and communication services, innovation and technology.

ANNUAL REPORT 2021 - 2022

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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, Collaborative, Supportive,
Collegial, Inclusive, Transparent

PRESIDENT'S REPORT



DION CUSACK
ALPMA PRESIDENT

This time last year, I wrote that we had, "had another great year". This year, I am delighted to be able to say the same yet again. While the year began, much the same as the year before, with the ongoing uncertainties that COVID-19 presented, we decided to take a cautious, purposefully optimistic and innovative approach to the way we managed the association. At various and many junctures of the year, it was easy to become consumed by the events of the day with razor sharp focus in managing those events, but it is often not until one steps back, to reflect, and write a report like this one, that they are able to take in and consume all that has been achieved.

As a community and learning and development association, we rely on the engagement of our partners, staff, committees and members to make ALPMA a success. The achievements are therefore shared, and so I am excited to share, that at the time of writing, there are many highlights and successes of which we can all be proud.

- Our total membership numbers continue to increase. As at the time of writing, we are just shy of 1,700 total members. This is a great result and is as a result of our corporate subscription model offering developing, and the value proposition being recognised by those member firms.
- Our annual Summit was held on the Gold Coast in September. Planning for the event commenced at the beginning of the year, and its success was deemed a critical mission for ALPMA. It was an overwhelming success, and it was great to see so many members back, face to face again for a mixture of learning and community-focused events.
- This year, in keeping with a key strategic priority, we committed to investing in building a completely new technology platform. This has been a significant undertaking for an association of our size, investing close to \$150K, in this new system that is the backbone from which the association is managed. The benefits to members will be instantly recognisable as the new platform is more intuitive and user friendly. In addition, the association will become more efficient as a number of backend processes that are currently disparate or manual, will become succinct and automated. This is an example of true innovation at work. And I am excited to say that at the time of writing, the new platform is mere weeks away from going live.
- Our financial performance remains strong, in difficult times. Yet again, we commenced the year with a sense of caution and a commitment to tight fiscal prudence. This was no mean feat, given that it was a year that once again saw us forgo income from our annual Summit. But by tight control of our costs, we thrived and have finished the year in a slightly better position than the last.

PRESIDENT'S REPORT (CONT.)



- Our Mental Health First Aid Training offerings continue to be widely taken up by many of you. ALPMA is a passionate supporter of these types of training programs as they benefit not only individuals, but also the firms and the profession overall as a whole. We are well placed and will continue to expand on this training into the future.

- We are raising our profile. Throughout the year we have increased our engagement with the likes of Lawyers Weekly and Australasian Lawyer. This has proven a success in highlighting what we do within the profession and promoting our member services more widely.
- We will be back in Singapore this December. Marking our 5th Regional Law Firm Management Forum, after a two-year hiatus, we are delighted to be able to bring the legal community together again to network and hear from a wide range of engaging experts and professionals. As always, we also look forward to continuing to build our alliances and friendships in Singapore.

Going into next year, I am confident that with the gains we have made this year we can curate an even better year next year, if we are focussed, nimble, and ready to think beyond the traditional way of doing things. While there are many uncertainties right now, by recognising those uncertainties when they arise and addressing them one by one at the time, we will, as we have in the past, not only overcome them, but be stronger because of them.

On behalf of the board, I offer our sincere thanks to our partners for their ongoing support throughout the year. And thank you to our contractors and staff led by our CEO Emma Elliott, and various committees across Australia and New Zealand who have each worked tirelessly for ALPMA. And finally to our members, thank you for being a part of our community and your ongoing support.

DION CUSACK
ALPMA PRESIDENT

CEO'S REPORT



EMMA ELLIOTT
ALPMA CEO

Whilst this year was another challenging one, as we worked our way through the enduring pandemic, it also offered the opportunity to recalibrate and have space to work on strategic projects that will unlock and advance our association into the future. Though some of these efforts haven't yet been realized, they will shortly. Overall, the year can be summed up as another successful year, in troubling times, and one that will go a long way to building a solid foundation for the Association in years to come.

Some significant milestones were hit this year with membership numbers exceeding, for the first time, 1,000 members, closing the year with a total membership of 1,311. This represents an increase of 525 members. The introduction of the corporate subscription model assisted greatly with this increase in members with 25 firms joining under this arrangement. We are conscious that with this increase in membership, and diversification of member roles and needs, comes a more varied learning and development promise to members. Along with the general increase in online content and courses being delivered by our national team coupled with the increase in memberships we expanded our L&D team, in early 2022, and now have two dedicated team members working to deliver content for members.

This was an important step as we witnessed the nature of membership engagement changing due to various COVID restrictions. In FY2022, the national L&D team delivered thirty (30) individual webinars throughout the year, with an average delivery rate of three (3) webinars per month.

Throughout the year, but particularly at the beginning of FY2022, COVID restrictions across Australia and New Zealand still varied greatly which impacted on our branch committees' ability to deliver local events in person. That said, our local branch committees managed to deliver a total of 50 events throughout the year, consisting of 22 in-person only events and an additional 28 in-person or online events across the region. A significant contribution by our members, for our members to help connect and unite our community.

As a membership Association we are always looking for opportunities to assist members, respond to their needs and to help find solutions to challenges faced within the industry. This year saw us respond to several requests from members and partners with the largest of these responses being the Law Firm IT and Practice Management Solutions (PMS) Survey and subsequent PMS Partner Showcase. This survey and showcase were in response to concerns from members on the back of changes happening in the PMS market, which culminated in the production of a 30+ page report and a partner showcase consisting of ten (10) webinars and ten (10) on demand recordings, from ten (10) practice management solution providers. This survey and showcase produced some of our best engagement rates for the year with over 600 registrations received across these events. Special thanks to our PMS Partners and also to IT Simply for their support on this initiative.

In addition to the introduction of the IT Survey, we also saw the return of the Financial Benchmarking Survey with the FY21 survey and report being produced, in partnership with FindEx. Other Benchmarking reports produced this year included the extremely popular, Australian and New Zealand HR Issues and Salary Survey Reports.

CEO'S REPORT (CONT.)

These reports had 280 and 117 law firm participants, respectively, representing a total employee staff base of over 12,500. This year the Australian survey saw its expansion into the Intellectual Property (IP) space after being approached by a small group of IP Firms to customise a specific salary report. We were pleased to meet the needs of these members and to work with this group to develop this bespoke report. Thank you to all our benchmarking collaboration partners for their ongoing support.

Last year you may recall one of our initiatives undertaken was the internal training of our L&D Manager as a qualified Mental Health First Aid training instructor so we, as an Association, could train members directly. I'm pleased to report as a direct result of this training Fiona Croswell has trained 144 people within this course, increasing our total people trained to over 330 people in the past three years. This year we have extended Fiona's training so she may offer the MHFA Refresher training course to those wishing to keep their current qualifications active for a further two years. Again, this initiative has been a direct response to the challenges experienced within the industry and we are pleased to be helping the industry address this challenge, raise awareness and actively support its people. Many thanks to legalsuper who partner with us to deliver this initiative to the legal community.

After what can only be described as "on again, off again" conference management planning over the past three years, in early 2022 we turned the corner and were confident that we would deliver the 2022 ALPMA Summit in early September, this year.

Whilst the event delivery sits outside of this Annual Reporting year the planning for the event very much sat within this financial year. The 2022 Summit saw the return of our flagship event and the reconnection of our members, partners and community.

It really was a celebration to be reconnected with colleagues after three long years of separation. Our sincere thanks to our Principal Partner Dye & Durham who, quite literally, went over and above for this event. To our other partners, speakers, summit committee members, PCO and members who joined us for this three-day event, thank you. It was a joy to see you all in person again and we look forward to welcoming you in Melbourne in 2023. Along with this local confidence for the return of in person conferences, in December 2022, ALPMA will also see the return of the 5th Regional Law Firm Management Forum in Singapore.

I'm pleased to report that throughout FY2022 we have been working very hard, in the background, on initiatives that will see a significant improvement to customer (member & non-member) experience journeys with ALPMA, in particular as they relate to our website. We hope to be in a position to launch our new website platforms shortly, which will enable a simplified checkout system, easier access to on-demand recordings and general increased functionality. This system will also provide increased data transparency across member engagement (amongst other things) that will enable our Association to be more proactive in its member management. A welcomed change.

As always, our promise to members can never be fulfilled without the support and contribution of our member volunteers who sit on various committees within ALPMA and on our National Board. Our volunteers provide countless hours of assistance to the Association and are a pillar of strength in delivering local events and other initiatives.

CEO'S REPORT (CONT.)

On the note of significant volunteer contributions, this year will mark the end of Dion Cusack's term as President of ALPMA after five (5) years in the role. Dion has sat on the Victorian Committee for ten (10) years and on the ALPMA Board for the same, as the Victorian Branch Appointed Director. His commitment to ALPMA is second to none, never faulting on his vision to push the Association forwards to realise its potential. He is visionary, commercial and calm in a crisis. He led the Association through the COVID pandemic and should be proud of the Association he has built during his tenure. On a personal note, it been a pleasure working with Dion since commencing in July 2018 and I thank him for his commitment, trust, guidance and friendship.

As with most Boards, change is inevitable, and as at 30 June 2022, Sam Sofianos and Myra Quartermaine have stepped down from the Board. Also stepping off the Board with Dion at the FY2022 AGM will be Begonia Silvestre (8 years), Debra Filippin (4 years) and Neville Carter. Lee James will also step off with a change in the NZ Branch Appointed Directorship. Many thanks to all these board members for their hard work and dedication during their terms.

Finally, it is also important to recognize the internal staff changes at ALPMA. In FY2022 we saw the departure of our two long term Event Coordinators, Melanie Grace and Angelique Cooper and welcomed to the team Sarah-Jane Laing and Jillian Hays into these roles. We expanded the L&D team and welcomed Carmen Maughan into the National L&D Manager role, with Fiona Croswell moving into a Strategic L&D position.

With demand to deliver increasing quantities of digital partnership entitlements and the introduction of our corporate subscription model, Jane Easterbook has joined ALPMA in a Customer Relationship Manager role. Together with the other team members we look forward to continuing to deliver on our promise and increasing our value proposition to members in FY2023.

EMMA ELLIOTT

ALPMA CEO



GROWING OUR MEMBERSHIP

ALPMA's membership increased over the FY2022 period from 786 members to 1,311 members, an increase of 525 members and the first-time membership surpassed 1,000 members. An excellent result.

In late 2021, ALPMA launched the Corporate Subscription model and by June 2022, 25 firms had taken up a corporate subscription option, accounting for 603 members. Within the corporate subscription membership 117 people are categorised as full members and a further 486 are categorised as affiliate members. In real terms, the ALPMA full membership increased in the FY2022 period to 805, an increase of 19 full members from the previous year (of 786).

Approximately 89% of our membership sit within firms of less than 150 people, with firms with less than 25 employees making up a significant amount of our members. A strong geographical spread of members are located across the east coast of Australia and across New Zealand (86%).

In the coming financial year, ALPMA will be focusing heavily on our membership attraction, engagement and retention strategies to ensure we are delivering on our promise to members. Whilst the majority of our members occupy a Practice or General Management role within Australasian law firms, it's important we revisit our value proposition and ensure continued relevancy into the future as roles naturally evolve.

Membership Numbers as at 30 June 2022

1,000+

MEMBERSHIPS TARGET ACHIEVED



TOTAL MEMBERS

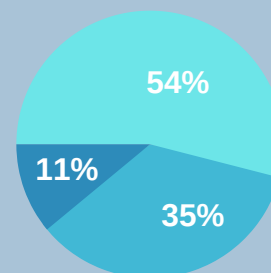
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WHICH INCLUDES: 825 FULL MEMBERS AND 486 AFFILIATE MEMBERS

MEMBERS BY MEMBERSHIP OPTION:

Life Members	20	1.5%
Full Members – Individual	688	52%
Full Members – Corporate	117	9%
Affiliate Members – Corporate	486	37%
Total	1,311	

MEMBERSHIP BY FIRM SIZE



54% - SMALL FIRMS (LESS THAN 25)

35% - MEDIUM FIRMS (25-149)

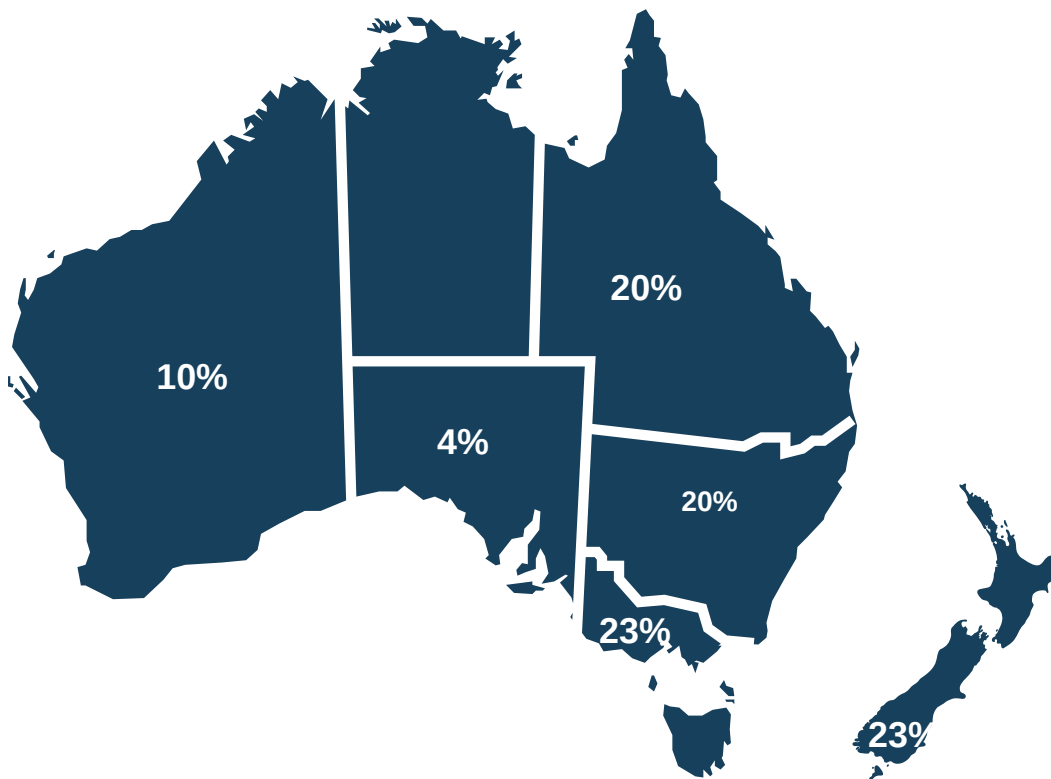
11% - LARGE FIRMS (150+)

MEMBERS BY MEMBERSHIP TYPE:

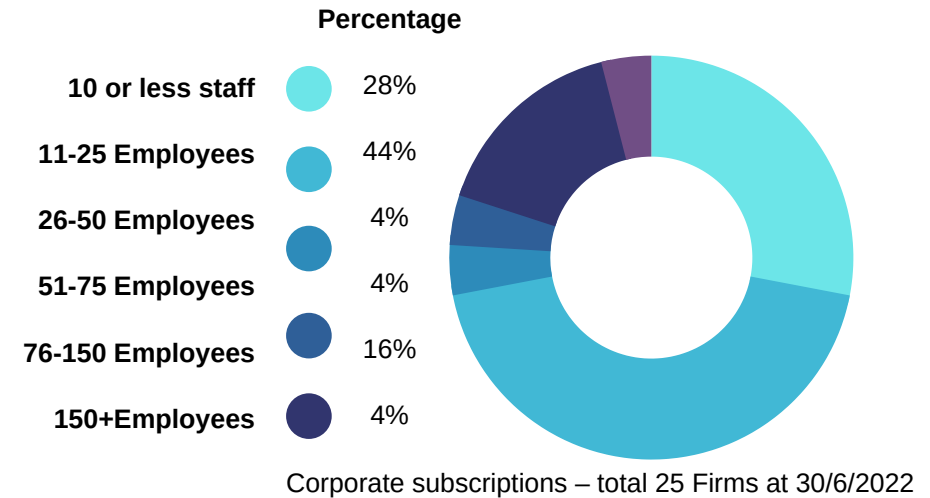
Life Members	20	1.5%
Full Member (12 months)	631	48%
Full Member (6 months)	23	1.7%
Online Members	30	2.2%
Associate	4	<1%
Full Members – Corporate	117	9%
Affiliate Members – Corporate	486	37%
Total	1,311	

GROWING OUR MEMBERSHIP

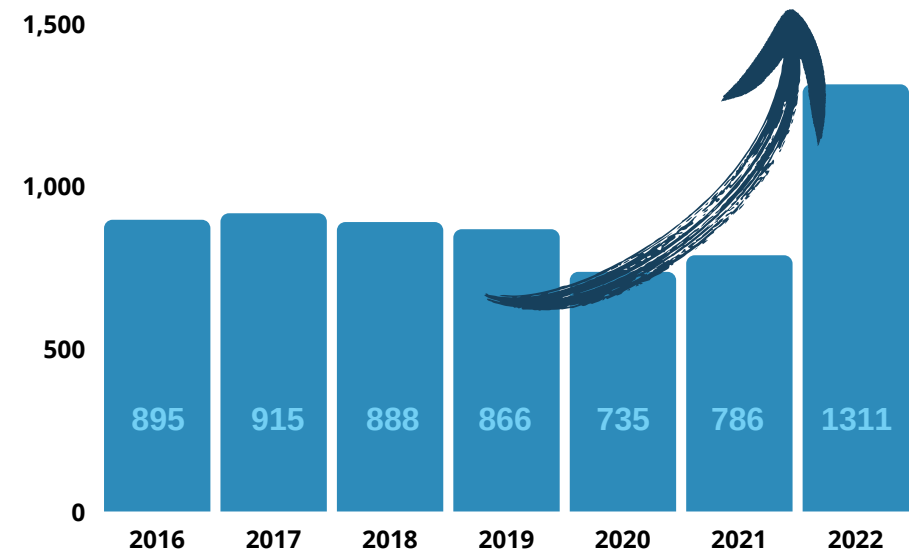
MEMBER BY LOCATION



CORPORATE SUBSCRIPTIONS



MEMBERSHIP GROWTH



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.

FY2022 LEARNING & DEVELOPMENT (JULY 2021 – JUNE 2022)

The beginning of FY2022 saw some continual disruption from the COVID pandemic and we continued to deliver a combination of online and hybrid events, particularly for those Branches which were more impacted by lockdown restrictions. By the 2nd half of FY2022, more in-person events could take place; however, we continued to deliver ALPMA programs in a combination of hybrid, virtual and face-to-face seminars and workshops.



The FY22 learning and development program consisted of:

- 30 webinars across Australia and New Zealand, and one webinar delivered exclusively to Singapore in partnership with the Law Society of Singapore.
- There were 22 face-to-face seminars delivered in some Australian locations as they transitioned out of lockdown, and in-person event restrictions were lifted.
- We continued to offer the Mental Health First Aid Accreditation program, delivered online, and conducted 12 workshops with 144 participants completing the workshop.
- Victoria conducted a one-day HR Updates hybrid workshop.
- Virtual Practice Management Showcase with 10 Partners and included a webinar and a system demonstration recording which was then created into an On-Demand package with all 20 recordings available in one course.
- There were 36 additional recordings added to the on-demand library. The On-Demand Learning Centre also includes Learning Packages, including curated content across topics relevant to law firm management. The On-Demand Learning Centre now holds over 200 On-Demand recordings.
- 28 Member Connect, Small Firm Manager Group, Risk Group, Breakfast Club and networking sessions took place across Australia and NZ. These events provide an opportunity for the ALPMA community to connect informally to share their knowledge and experience on current issues.

2022 Law Firm IT & Legal Practice Management Solution Showcase & Report

IN PARTNERSHIP WITH **practice intelligence**
powered by IT Simply



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. FY2022 in particular offered opportunities to deliver on tried and true benchmarking reports but to also introduce new initiatives on the back of member demand.

In FY2022, ALPMA conducted the following research in conjunction with our research partners:

- 2022 Australian Legal Industry HR Issues & Salary Survey supported by McKenna & Associates, people2people, In2view and Elias Recruitment. The 2022 Report was released in April and provided a good snapshot of salary movements and HR Issues faced over the past 12-months. In total 280 law firms from across Australia participated, representing, 9,045 employees across 70 positions.
- In 2022 the Australian Legal Industry HR Issues & Salary Survey was expanded to include a specific Intellectual Property (IP) salary survey designed by a small group of IP law firms. This group approached ALPMA to independently run, on their behalf, a bespoke survey for their members. ALPMA was pleased to work with this group to deliver this resource.
- 2022 New Zealand Legal Industry HR Issues & Salary Survey supported by Fluid Legal was released in March and provided a good snapshot of salary movements and HR Issues faced over the past 12-months. In total, 117 law firms from across New Zealand participated, representing, 3,500 employees across 40 positions.

- The FY2021 Financial Performance Benchmarking Survey returned this year in partnership with Findex. This report is always a welcomed resource for our members and this year was no exception given the challenge of COVID. One hundred firms participated to produce these report findings.
- The introduction of the Law Firm IT & Practice Management Solution (PMS) Report in partnership with IT Simply was a well-received addition to our annual benchmarking calendar. The changing PMS landscape, particularly in New Zealand, drove the need to establish this report for members. The survey had 241 participants with the results summarized in a 35+ page report. To compliment the report and provide members with easy access to various PMS providers ALPMA hosted our first Partner Showcase week. This initiative enabled partners to showcase their PMS platforms to our members online, all recorded and accessible afterwards for members on the ALPMA website.
- The 2022 Legal People Productivity Survey in partnership with BigHand. This report built on the previous year's report and took a deep dive into the changing landscape of workflow management for remote and distributed teams as a result of COVID.

ALPMA Blog & Newsletter

The ALPMA blog 'A survival Guide for Legal Practice Managers' provides a regular source of opinions and advice on the business of law from leading industry experts. The monthly ALPMA newsletter has become a regular stream of helpful information for our ALPMA Members again this year as we continue to find our way in this evolving landscape.



DEVELOPING NEW MARKETS AND STRATEGIC RELATIONSHIPS

In FY22 ALPMA continued to initiate, develop and strengthen relationships, in a considered manner, across the industry with key stakeholders. Many relationships, whilst strengthened, could not be fully realized this year due to underlying technology inhibitors. That said, in the years ahead these barriers should resolve.

Across the year ALPMA has:

- Continued to strengthen our collaborative relationship with the Association of Legal Administrators (ALA) with ALPMA President, Dion Cusack sitting on the ALA's International Relations Committee.
- Continued to strengthen our relationship with the College of Law (COL) and the Centre for Legal Innovation (CLI) with the continued Board appointment of Angie Zandstra, Chief Commercial Officer, COL.
- Introduced the Virtual Careers Fair for law students in collaboration with legalsuper and The Piddington Society. This event helps to educate students on the various employment opportunities within the industry, provide invaluable insights into law firm recruitment practices and helps students connect with local, ALPMA member law firms to whom they may not typically be exposed. This event was piloted in Perth in FY22 with the expansion into Melbourne in FY23.
- Continued to provide support to the Singapore Law Society by participating in their Virtual visit to ALPMA in February 2022. ALPMA hosted a two-part session: firstly, addressing IT changes and technology advancements seen in the Australian markets; and secondly a presentation on good Practice Management practices followed by a networking session with a group of Australian Practice Managers.
- More locally the ALPMA Branch Committees have continued to collaborate with many State Law Societies with a special mention to the Queensland Law Society who provides the Qld ALPMA Branch with venue hosting facilities.
- The ALPMA Board, staff and committees continue to further other strategic initiatives to further strengthen our position and reach within the legal industry.



“Lawyers survive by virtue of the value that they bring to clients and the professionalism with which they operate.”

MIKE KELLY - DIRECTOR
SOUND BUSINESS SYSTEMS

ALPMA BOARD OF DIRECTORS

AS AT 30 JUNE 2022

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



**NEVILLE
CARTER**

DIRECTOR

The College of Law
Chief Executive Officer
(Board Appointed)
Leave of absence



**DION
CUSACK**

PRESIDENT

K&L Gates
Corporate Service Manager
(Vic Branch Appointed)



**BEGONIA
SILVETRE**

VICE PRESIDENT

Hunt & Hunt
General Manager
(Board Appointed)



**ANGELA
SCARFO**

COMPANY SECRETARY

Statewide Super
Senior Manager - Risk
(Board Appointed)



**EMILY
MORTIMER**

DIRECTOR

Piper Alderman
Director of Humane Resources
(Board Appointed & Acting
SA Branch Appointed)



**SIMON
DODWELL**

DIRECTOR

Piper Alderman
Client Development
Systems Manager
(NSW Branch Appointed)



**SIMON
SOFIANOS**

DIRECTOR

Colin Biggers & Paisley
Chief Information Officer
(Board Appointed)



**DEBRA
FILIPPIN**

DIRECTOR

Pinsent Masons
Head of Business Development
(Board Appointed)



**MYRA
QUARTERMAINE**

DIRECTOR

Valenti Lawyers
General Manager
(WA Branch Appointed)



**STEPHEN
VAN DORP**

TREASURER

Chief Financial & Operating Officer
Mullins
(Qld Branch Appointed)



**ANGIE
ZANDSTRA**

DIRECTOR

The College of Law
Chief Commercial Officer
(Board Appointed)



**LEE
JAMES**

DIRECTOR

Fletcher Vautier Moore Lawyers
Chief Executive Officer
(NZ Branch Appointed)



**DAYNA
ROBERTS**

DIRECTOR

Kain Lawyers
Marketing & Operations Manager
(SA Branch Appointed)

ALPMA TEAM

VOLUNTEERS

ALPMA has approximately 80 member volunteers who generously give their time to branches, committees and working groups. We currently have branches in VIC/TAS, NSW/ACT, QLD/NT, SA, WA and New Zealand. Each branch has up to 10 local committee members who drive L&D programs and other initiatives at the local level.

Additionally, ALPMA has many other working committees that contribute to our Association in many ways. These committees include:

- National Learning & Development Committee
- 2022 Summit Committee
- IT Steering Committee
- Governance, Risk & Nominations Committee
- Branch Chair & Treasurer Committee

We would like to take the time to acknowledge and thank the many people who have contributed to these committees during the year. Our many members generously give up their time to help advance the association's objectives and provide a valuable service for our members. We would not be able to deliver the volume of resources that the Association does, without their support. Thank you.

Moving into FY2023 there will be more opportunities for members to engage and volunteer with ALPMA as the following committees are (re)established.

- Membership Development Committee; and
- Partnership Committee.



ALPMA TEAM

EMPLOYEES & CONTRACTORS

During the pandemic the deliverables of the ALPMA National team increased significantly and several new roles were created. Our L&D team grew with Fiona Croswell moving into a Strategic L&D Management role and Carmen Maughan joining us as National L&D Manager. No doubt you will have seen Carmen hosting our webinars recently. With the departure of Melanie Grace and Angelique Cooper from the Events Coordinator roles we welcomed Sarah-Jane Laing and Jillian Hays into these roles. Both SJ and Jill have hit the ground running and are fantastic additions. With the expansion of both digital partnership entitlement delivery and the introduction of the Corporate Subscription model we welcomed Jane Easterbrook into a Customer Relations Manager role.

Our in-house team is an experienced and passionate team that regularly go over and above for the Association. This year, like many, has been full of challenges, event delivery (both online and in person) and project work. Whilst some of this work is not yet visible it will be foundational to the sustainability of the Association moving forwards and will remove a number of barriers that have plagued the association for over three years.

With a strong focus on providing a valuable service to members the coming financial year will focus on member attraction, engagement and retention whilst ensuring the sustainability and longevity of our Association for many years.

ALPMA acknowledges our team:

EMMA ELLIOTT – CHIEF EXECUTIVE OFFICER

FIONA CROSWELL – STRATEGIC L&D MANAGER

CARMEN MAUGHAN – NATIONAL L&D MANAGER

LESLEY HAYS – CUSTOMER EXPERIENCE SPECIALIST

MIRIAM BRYCE – PARTNERSHIP MANAGER

JANE EASTERBROOK – CUSTOMER RELATIONSHIP MANAGER

JO HOOD – MEMBERSHIP MANAGER

SARAH-JANE LAING – EVENTS MANAGER NZ | VIC | SA

JILLIAN HAYS - EVENTS MANAGER NSW | QLD | WA

HEATHER CONNELL - BOOKKEEPER



ALPMA BRANCH REPORTS

VICTORIA

The Victorian Committee had another great year. Despite heavy covid restrictions for a large proportion of the year, the committee always looked for ways to engage members through webinars, or online networking (such as through the Risk Management and Small Firm Managers Groups). The committee facilitated an impressive suite of events addressing topics ranging from Cyber Security and Trust Auditing to the popular HR Day.

The Victorian special interest groups; Risk Management and Small Firm Managers Groups, continue to build, after holding 3-4 events throughout the year, providing opportunities for members involved in Risk or who work for a small firm to share ideas and provide support to each other regarding similar issues or challenges being faced by those in the group.

The HR Day was another highlight for the committee drawing high profile fantastic speakers. Despite the challenging environment with many attendees online as many were still working from home in early May, the event was a great success. Thank you to Tanya, Jill and Ruth for their tremendous contribution to the organisation of this event.

The committee is a strong, close-knit group of hardworking individuals who participate in highly productive meetings that wave the ALPMA flag high and proud! It was wonderful to all connect in-person again at the ALPMA Summit, made extra special this year as the Victorian Committee was honoured to receive 'Committee of the Year' at the Summit Awards. In addition, committee member Tanya Burns was a deserving recipient of an award for ALPMA Volunteer of the year!

Tanya is a big part of the Victorian Committee, this year leading three webinars plus being heavily involved in the planning and execution of the HR Day and hosting a Small Firms Networking event.

This year we will see our National President and fellow Victorian committee member, Dion Cusack step down after 10 years. Dion has led ALPMA through interesting and challenging times, not just a pandemic but also a lot of changes within ALPMA and the organisation is a better place due to the sincerity and humility with which Dion has led ALPMA.

We look forward to the challenges that lay ahead in 2023.

VIC BRANCH COMMITTEE.



ALPMA BRANCH REPORTS

NEW SOUTH WALES

We started the year with the expectation of dealing with the 'new normal' – but COVID had other plans for us, sending us back into a period of lock down. Once lifted we saw the return of domestic and international travel and resumption of some semblance of normality – certainly a year of change! The latest year continued to present unique challenges, and opportunities, for all members. Our national team and branch committees have continued to deliver value to our members via hybrid and in-person opportunities.

We are pleased to advise members that after many years of different event locations, the College of Law have graciously agreed to allow us to use their new facilities at Level 4, 570 George Street. This new space will be our regular meeting place for in-person meetings and affords us the opportunities to deliver relevant seminars in a hybrid format. We strongly encourage members to attend in person to check out this wonderful new space.

It was wonderful to attend Summit 2022 at the RACV Royal Pines Resort, Gold Coast this year; this was the first time in three years that members were able to connect with old friends, members and corporate partners. Many members reported feeling enthused and energised after attending Summit and being able to take ideas and initiatives back to their organisations.

We extend our thanks to Fiona Croswell and the national Learning and Development committee that have diligently worked with national branch committees to deliver an extensive and timely series of online learning resources that have benefitted the whole community.

Your branch committee are busy planning L&D, practice manager networking sessions and social events for the next year. We hope to see you at as many events as possible in the coming year.

Since the FY21 branch report, the New South Wales and Australian Capital Territory Branch Committee welcomed Narelle Hawken, Pia Luedeker, Stephen Phillips, Ben Stack and most recently, Castaly Haddon to the branch committee. We sadly farewelled Robert Pasqualin who has decided not to renominate after four years; we wish Robert well and thank him for his service to ALPMA.

As a committee we continue to focus in increasing our engagement for all NSW/ACT members, not just for those based in the Sydney CBD. The committee aims to organise more events in our regional centres in addition to the Sydney CBD. Over the next twelve months we aim to organise fewer, but of higher quality, learning and development and networking sessions. Please contact a member of the committee if there is a particular learning and development event that you want us to run.

Our community benefits from our committed and energetic corporate partners, each adding real value by providing opportunities to understand tools and services available to leverage solutions in the market. We truly value their participation.

With lockdown restrictions easing across the country, we are on the pathway to returning to normal. I speak on behalf of everyone when I say that I am looking forward to meeting with our existing, and new, members in person over the next twelve months and beyond.

NSW BRANCH COMMITTEE.

ALPMA BRANCH REPORTS

SOUTH AUSTRALIA

Like previous years, this year has continued to be a very busy and challenging year, but things are starting to look up from the last 2½ years. There is light at the end of the tunnel.

We have learnt a lot and we are more experienced at dealing with the new challenges as they come across our desks. Our next challenge is recruiting and retaining staff! We will hear a lot more about this in the coming year.

Even though our members are still very busy, we are seeing an appetite amongst them for face-to-face events. Virtual meetings have been fantastic for saving time. We have now all learnt to conduct them without too many incidents. However, there is a move in South Australia for getting back to seeing each other, we are craving interaction with people and networking opportunities.

Our membership has remained stable again this year and we will keep trying to build the membership with terrific offerings including those from National which has taken a lot of pressure off the committee locally and enabled the SA committee to focus on the issues that are of importance to our local members.

A new initiative this year was a Breakfast Club which was well received but kept getting shanghaied by COVID infections and isolation requirements. We are optimistic that going forward, with lower infections, there will be a greater uptake. We are also exploring a lunch format that is just a bit different to the usual sandwich lunch to see if the time slot is more convenient for members.

A couple of initiatives that worked well this year were:

- Strategic Planning and Decision Making presented by Nigel McBride. This attracted members that we don't usually see and non-members. With everyone grappling with the future of their firms coming through the other side of the pandemic this session was valuable on what the important things are to focus on going forward.
- Practice Management Systems with panellists, Bianca Hale, Dayna Roberts and Trevor Crispin. With the changes in technology and work practices there has been a renewed interest in practice management systems and systems that are in the cloud to enable staff to work remotely.
- Salary Survey Panel Discussion, we heard from Emily Mortimer, Susan Treglown and In2View Recruitment on the latest figures and trends to emerge from the 2022 Salary Survey.

Our partners have once again been very supportive, and we look forward to seeing more of them now that the infection rates have decreased, and travel gradually getting easier.

Our committee had a few changes this year, we said goodbye to Kristina Paulson, and we thank Kristina for her contribution, and we welcomed Shaun Wyn-Jones who has been a very active member of the committee. We thank all the committee past and present for their hard work and fantastic input and a very big thank you to Sarah-Jane Laing who has kept us all on track and done a terrific job. The hunt is still on for committee members to enable us to focus on delivering to our members and partners.

At the end of 2022 we will also see our Chair and Treasurer, Joy Virant, head into retirement. Joy has been a pillar in the South Australian Committee, a wealth of knowledge and connections that we are all very sad to see go. The committee wishes you all the best in your next chapter, and thanks you for the incredible amount of work that you dedicated to the committee over the past 6 years.

SA BRANCH COMMITTEE.

ALPMA BRANCH REPORTS

QUEENSLAND

2021/2022 was a year of reconnecting and refocusing as we began to emerge from the pandemic and into a changed landscape. It was evident that the needs of our people and the businesses we lead were transforming at an accelerated pace. The skills and knowledge we would need to support them would also need to evolve and we sought to reflect that in our Qld program.

We were delighted to retain the support of our engaged Qld committee and to welcome Greg McClure, McCarthy Durie Lawyers, rounding out an enthusiastic and hardworking branch committee who share a broad range of skills and expertise.

We kicked off with a well-attended social event in July and while seats and masks were still required at that time, the sense of energy and community set the scene for the year ahead and motivated the Qld committee to provide opportunities to bring members and partners together whenever we could safely do so.

We got off to an excellent start with Jason Rodgers from Eventus Consulting; **Intuition to Science: Understanding and Using Psychometric Testing** in July. Lockdowns presented a hurdle in August, but we were back at The Qld Law Society and a sell-out crowd for our popular annual **Trust Accounting** update in September. We followed this up with **Leading Wellbeing** for Mental Health awareness month in October and a visit from Lexon Insurance in November for **Lawyers' blind spots – Seeing what matters when it matters**.

We closed out a challenging year with a festive event overlooking the beautiful Brisbane River. There was a sense of cautious optimism and excitement as we headed towards 2022.

Local weather events resulted in a challenging start to 2022, however we were pleased to deliver an innovative and entertaining program of in-person events back to back from March through to June. We welcomed Kim Wiegand and George Beaton for **Sustainable Growth: Culture, Clients & Cashflow (3Cs)**, **Unconscious Bias** with Qld Law Society CEO, Rolf Moses, **Creating Flexibility and Value in the Way We Work** with Carolyn Solley from Hassell and **Considerations When Setting Financial Targets** delivered by Jason Popelier, Odyssey Advisors. We have enjoyed fantastic continued member engagement and interaction as a result with well over 300 member registrations and over 100 guest registrations to those events.

We welcomed our new Events Coordinator Jillian Hays in late February and were grateful that Jillian was able to hit the ground running and keep the monthly events and committee meetings running smoothly.

We continue to enjoy valued relationships with our Qld Corporate Partners and with many of our National Partners who are an integral part of the ALPMA community. Bringing value to our members is at the heart of everything we do, and we are grateful for the ongoing support shown by our current members. We were pleased to see member growth of 10% in 2022.

2023 promises to bring more change and more opportunity. We have plans to continue to build on our recent collaboration with our NSW committee colleagues and look forward to continuing to extend our reach with Member Connect and expanding our popular Practice Managers forums (currently Brisbane CBD and Gold Coast) to bring smaller focus groups together.

QLD BRANCH COMMITTEE.

ALPMA BRANCH REPORTS

WESTERN AUSTRALIA

2022 sees another successful year for the WA branch. Our L&D program has remained strong with little impact affecting our ability to run in-person seminars and events providing consistency to our WA members and partners.

Our event calendar has provided a fantastic mix of learning and networking opportunities, on top of national webinars, WA has hosted 8 in-person seminars across a broad range of topics, 4 specific networking functions and 7 Practice Management Group Breakfasts which continue to gain momentum with the opportunity for members to share experiences and challenges that is facing firms in WA.

The WA Committee has been a strong and stable Committee for several years; however, this year has seen some movement with Jeanna Brady our L&D Coordinator and general committee member Carolyn White move on from the committee, contributing a lot to the committee we thank them both for their time and efforts. The largest and most impactful change to the WA Committee is the departure of our Chair and founding member Myra Quartermaine. After 10 years of service on the WA Committee as well as serving on the National Board, Myra's contribution, dedication, and advocacy for ALPMA and the development of the legal profession has been second to none. Myra remains a member of ALPMA, and we look forward to seeing her at all our events moving into 2023.

The WA Branch is proud of the strong relationships we can facilitate and foster for both members and our partners. With the reopening of the WA borders and travel returning to a state of normal, we are looking forward to bringing some strong presenters to the L&D program into 2023 and look forward to continuing the growth of our member base and partner relationships.

WA BRANCH COMMITTEE.



ALPMA BRANCH REPORTS

NEW ZEALAND

Your local New Zealand Branch committee has worked hard during the year to provide the best experience we can for our members, despite battling the challenges of Covid. As branch chair, I want to extend my personal thanks to each person who makes up the branch committee. Your commitment and effort through the year has been greatly appreciated, to our members, if you're talking with one of the committee members, please be sure to express your appreciation too.

Our committee has been working hard to try to maintain and develop positive relationships with our law firm alliance groups, a unique feature of the New Zealand legal landscape. Summit also provided an opportunity for face to face meetings with CEOs of two of those alliances. We'll continue working on those relationships. Our connections with those alliances are vital, as they bring a substantial portion of our membership as part of their bulk groups. The New Zealand branch had a goal to increase the number of full members to at least 156, with a stretch goal of 171. We're pleased to report that that at 30 June we had reached 169 full members, plus a further 129 corporate affiliate members.

Covid saw activities and events curtailed with restrictions on meetings as well as hesitancy around meeting together. Despite this we still managed some events, including a webinar on the NZ Salary Survey Report hosted by Fluid Recruitment, an in-person lunch time discussion in Christchurch on Legal Trends and Opportunities with Simon Tupman, well known in legal circles, breakfast networking sessions in Auckland and Christchurch, and informal evening networking sessions in Christchurch. We anticipate holding more in-person events, which will of necessity be more networking in nature, over the coming year.

The highlight of this year was getting to Summit, after two years without. When registrations were released, we still were not sure if we were going to get there. It was great to see approximately 35 New Zealanders at Summit, and four or five New Zealand businesses represented in the exhibition hall.

The easing of Covid restrictions and now a greater sense of freedom sees us anticipate an increased number of in-person networking events and, where possible, in-person events with local speakers. Given the geographical spread of our members, it is likely that webinars will still be the most appropriate means of connecting with us all.

Connections with our business partners are another vital piece of the puzzle. We're very grateful to Mark Beale, one of our committee, who has put in hours of work with current and prospective business partners. Without the support of those business partners, ALPMA would not be able to provide for you the membership benefits that it does. Please be sure to connect with our business partners, work with them where you can, and thank them.

Your committee has identified some challenges to work on over the coming year:

- How do we re-engage with members who may have withdrawn over Covid?
- How do we equitably provide for members outside of the main centres, as well as those within or near those centres? We are keen to see local geographical hubs develop where managers of nearby firms get together to share and connect with each other. If you are interested in that, please get in touch and we will see about connecting you with a local group – or seeing if you want to start one.

ALPMA BRANCH REPORTS (CONT.)

NEW ZEALAND (CONT.)

- What can we do to connect with the many mid-sized and larger firms who do not as yet have a connection with ALPMA? What's holding them back?
- How do we engage with the smaller firms, which may not have a “professional” manager, but where management is by a person holding a dual role, or by a partner/director? Do they know ALPMA exists? Do they know about the benefits of ALPMA membership?

Your local committee is always looking for new people to connect with, whether prospective new members, prospective committee members or prospective business partners. Our North Island, and in particular Auckland, is significantly under-represented in our branch committee. Here's a great opportunity for you to step up and get involved. Contact ALPMA or one of the committee to find out more.

We also very much welcome input from members as to what you want to see happen in terms of topics and presenters. ALPMA is there for you. If you have any answers, ideas or suggestions, your local branch committee would love to hear from you.

NZ BRANCH COMMITTEE.



OUR PARTNERS

We value the strong relationships we have built with our FY22 partners and thank them for their support, which allows us to continue to deliver our services to members.

AUSTRALASIAN CORPORATE PARTNERS



AUSTRALIAN CORPORATE PARTNERS



STATE CORPORATE PARTNERS



OUR PARTNERS

We value the strong relationships we have built with our FY22 partners and thank them for their support, which allows us to continue to deliver our services to members.

NEW ZEALAND CORPORATE PARTNERS



WEBINARS PARTNERS



OTHER PARTNERS



OUR PARTNERS

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PMS SHOWCASE PARTNERS



RESEARCH PARTNERS



FINANCIAL SUMMARY 2021 - 22

The 2021/2022 financial year was another challenging year for ALPMA financially as we navigated our way through the second full year of the COVID pandemic. That said, the year was better than the last with FY2022 recording a slightly smaller deficit at year end.

Budgeting at the beginning of the year was difficult again this year with many variables remaining unknown due to various states and locations experiencing lockdowns. The Board prepared for the worst and planned for the best. A small deficit at year end is a good result especially given this is the second year in a row that the ALPMA Summit has not been held. Profit from the annual Summit supports our overall financials.

The year has focused on rebuilding the Association and can be seen in the reduction of our cash reserves. This cash reduction is predominantly attributed to ALPMA's significant investment in new technology. This investment in technology will deliver ALPMA a new website in addition to a new member portal which goes live very shortly. This investment in technology, will remove pain points for members, improve the user experience and open up a world of opportunities to rethink how we do business. It will fundamentally change ALPMA from being a reactive Association to being a proactive one in the years ahead. ALPMA has been able to self-fund these projects this year using cash reserves that have been built up over years for exactly these types of purposes.

Whilst overall income increased by just over \$100,000 or 14.8% our operating costs increased by 9.5%. The increase operating costs is mainly due to the expansion of our employees adding both to our learning and development team and also to our relationship management team. With many more activities delivered online, roles at the national level have increased.

Looking forward to FY2023, there will be additional financial challenges faced but the Association is well placed foundationally to proactively address these. It is an exciting time for ALPMA as we move into FY2023 and reimagine our value and offerings to members.



	2022	2021
Cash at Bank	398,578	519,136
Receivables	45,241	30,931
Income in Advance	116,786	123,992
Conference in Advance	75,000	60,000
Member Funds	416,212	462,029
Gross Income	801,400	697,718
Operating Expenses	828,921	756,388
Surplus/Deficit	(45,817)	(51,599)

21
22



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