



# **SICorp TMF Legal Services Panel**

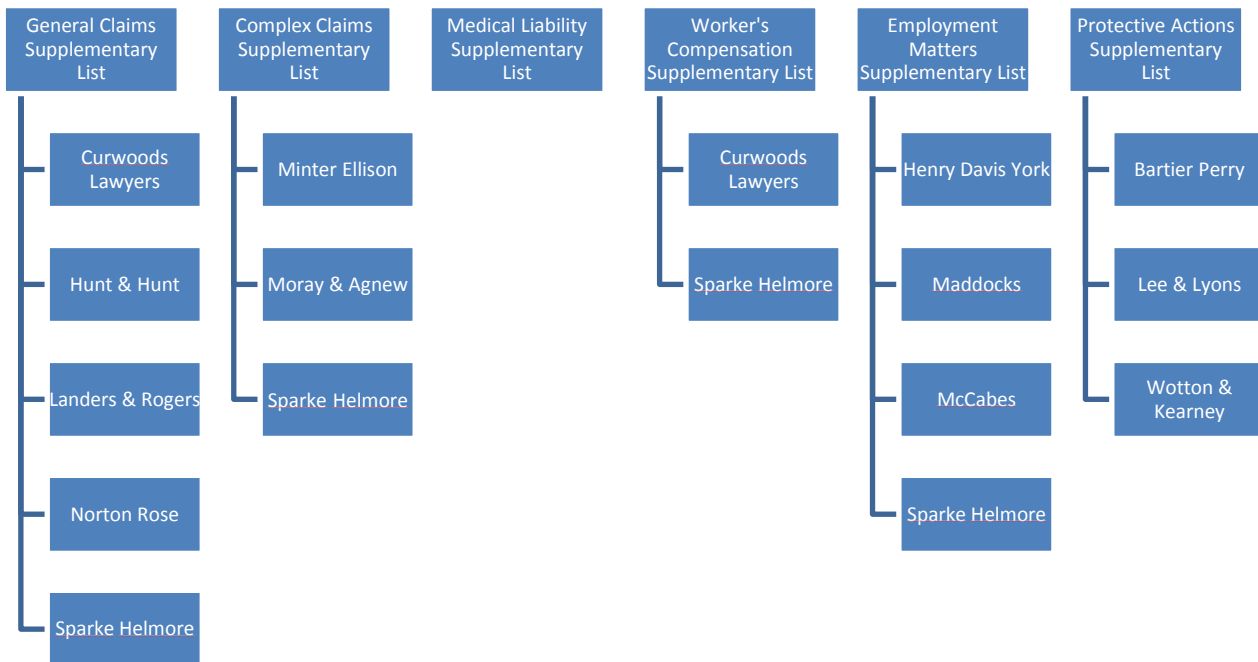
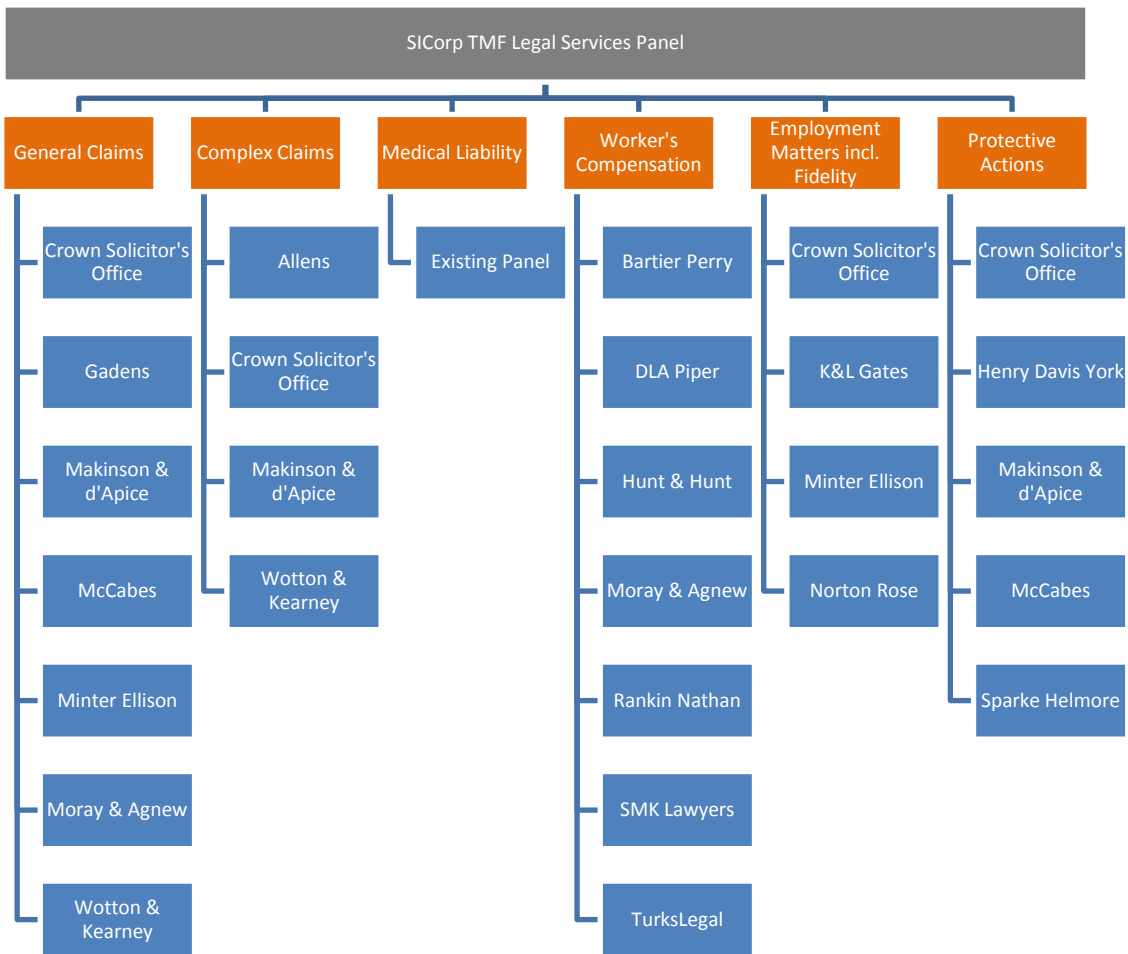
**Briefing Pack for Member Agencies | 13 June 2013**

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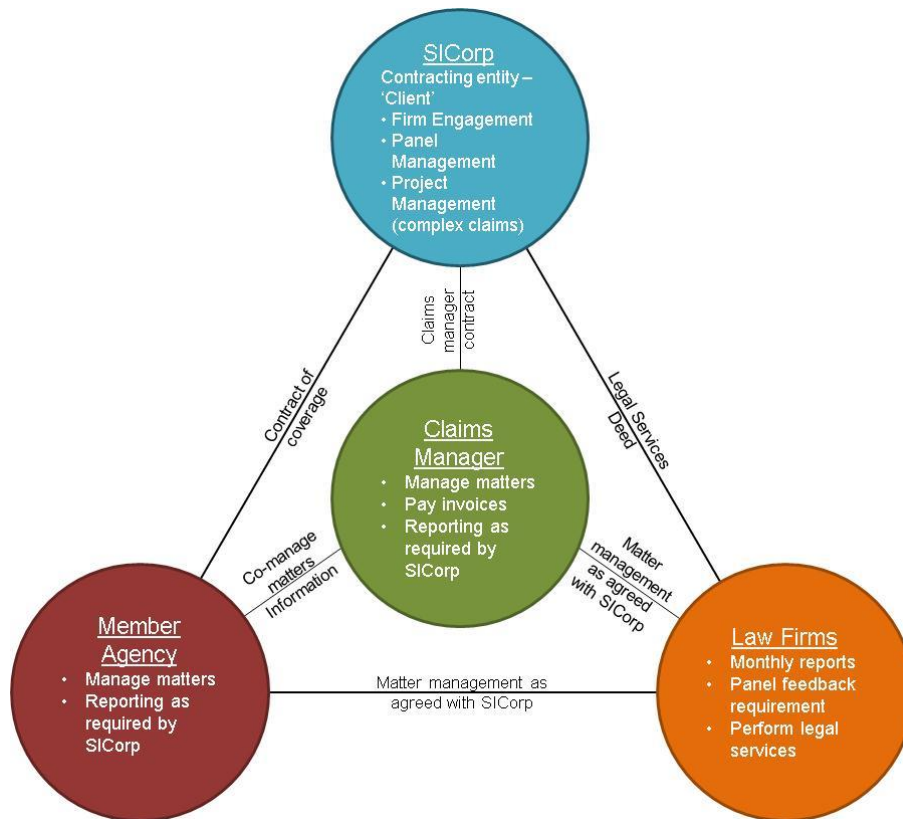
# 1. SICorp TMF Legal Services Panel Structure



## 2. SICorp TMF Legal Services Panel Governance

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### Panel Governance



The roles and responsibilities of SICorp, Claims Managers, key Member Agencies and Law Firms are set out below.

## **Roles and responsibilities for SICorp will include:**

### Firm Engagement

- contracting entity with legal services providers
- classify general liability matters according to risk and complexity
- select a legal services provider from the panel unless delegated to Claims Managers in the Delegations Manual (automated)
- respond to firm override requests
- obtain scope of works and cost estimate from legal service providers at the commencement of matters unless delegated to Claims Managers in the Delegations Manual
- provide initial instructions and approve cost estimates and strategy on Complex Claims
- project management of Complex Claims
- set fixed event/staged fees
- provide instructions on settlement in accordance with delegations
- managing the overall distribution of work to legal services providers in accordance with Panel arrangements and individual panel legal services provider performance

### Panel Management

- review and monitor KPIs;
- facilitate periodic meetings with legal services providers (individually and as a group);
- conduct periodic benchmarking of legal services providers;
- relationship management with panel legal services providers, including providing performance feedback

## **Roles and responsibilities of the Claims Managers will include:**

- selecting a legal services provider from the panel for matters as delegated by SICorp (automated)
- obtaining a scope of works and costs estimate with the legal services provider at the commencement of engagements as delegated by SICorp
- day to day conduct of matter
- information exchange between claims manager and agency as to progress of matter
- reporting panel legal services provider performance against KPIs to SICorp on the completion of matters (by way of survey)
- providing periodic reports on KPIs to SICorp to allow SICorp to benchmark panel legal services providers
- Claims Managers will also verify legal service provider invoices and pay amounts owing

## **Roles and responsibilities of Member Agencies will include:**

- day to day conduct of matter with Claims Manager
- information exchange between claims manager and agency as to progress of matter
- reporting panel legal services provider performance against KPIs to SICorp on the completion of matters (by way of survey)
- providing periodic reports on KPIs to SICorp to allow SICorp to benchmark panel legal services providers

## Roles and responsibilities of panel legal services providers will include:

- providing a scope of works and costs estimate at the commencement of an engagement
  - providing a detailed project plan for Complex Claims
  - comply with the service levels set out in Schedule 4 of the Legal Services Deed
  - comply with any structured fee arrangements prescribed by SICorp
  - provide alternative fee arrangement options in cost estimates where appropriate
  - provide invoices in the format specified by SICorp
  - provide Monthly Report as required by SICorp
  - provide value adds to SICorp, claims managers and/or member agencies as agreed in the Legal Services Deed
  - comply with information sharing requirements, such as attending whole of panel meetings, as set out in Schedule 3 of the Legal Services Deed
  - attend performance review meetings as required
-

### 3. SICorp TMF Legal Services Panel Law Firm KPIs

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Law Firms have a contractual obligation to comply with a number of service levels that are categorised according to the following KPIs:

- Timeliness (advices, reports, updates, invoices)
- Quality of service
- Cost estimates, cost management and billing
- Early resolution and settlement
- Engagement of Counsel
- Panel management and performance reviews
- Risk management and trend analysis
- Value add services

The panel management team will, on behalf of SICorp, monitor Law Firm performance against these KPIs, benchmark the Law Firms on a regular basis and conduct performance reviews with Law Firms

**Document 1**

*Allygroup*  
RESPECTED OUTCOMES

**Allygroup**  
**NSW Treasury Legal Panels Project**

**Scoping & Validation Workshop**

*Monday 05 July 2010*  
*Regus Phillip St Sydney*

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*Allygroup*  
RESPECTED OUTCOMES

**Workshop Objectives**

- Inform participants about project programs
- Explore key findings
- Obtain agency input into proposed NSW legal services procurement model

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## Workshop Agenda & Timings

9:00 am – 9.30 am	Introduction (C Jasper) • NSW Treasury – Matthew Phillips • Allygroup – Joanne Rees
9.30 am – 10:00 am	Presentation of Stocktake Summary (J Rees) Facilitation of discussion (C Jasper)
10.30 am – 10.45 am	<b>Morning Tea</b>
10.45 am – 11.00 am	Presentation of model and thought behind it (J Rees)
11.00 am – 12.00 pm	Facilitation of discussion on panel design (C Jasper)
12.00 pm – 1.00 pm	Facilitation of discussion on panel and matter management (C Jasper)
1.00 pm – 2.00 pm	<b>Lunch</b>
2.00 pm – 3.00 pm	Facilitation of discussion on Legal Panel Coordination and Business Improvement Unit (C Jasper)
3.00 pm – 3.15 pm	<b>Afternoon Tea</b>
3.15 pm – 4.15 pm	Other issues
4.15 pm – 4.30 pm	Conclusion and wrap-up

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## Attendees

- **Louise Hicks** General Counsel, Legal Services – Transport NSW
- **Stephen O'Gorman** Acting General Counsel, Legal Branch – NSW Roads and Transport Authority
- **Alana Starke** Corporate Counsel and Company Secretary – Sydney Ferries
- **Heather Oswald** Deputy Corporate Counsel – RailCorp
- **Kiersten Mulligan** Legal Counsel, Rail Infrastructure Corporation / Country Rail Infrastructure Authority
- **Peter Kembrey** Corporate Counsel – NSW State Transit Authority
- **Michael Antrum** General Counsel, Office of the General Counsel – NSW Police Force
- **Tony Wallace** Staff Officer / Practice Manager Inspector – NSW Police Force
- **Steve Garrett** Executive Director, Legal Services – Department of Environment, Climate Change and Water
- **Melinda Murray** Legal Services – Department of Environment, Climate Change and Water
- **Stephen Robertson** Senior Project Manager, Corporate Strategy and Services – Communities NSW
- **Leanne O'Shannessy** Director, Legal and Legislative Services – NSW Department of Health
- **Jeevani Korathota** Acting Director, Legal Services – NSW Department of Community Services
- **Lida Kaban** Director, Legal Services Branch – NSW Department of Justice and Attorney General
- **Brad Cole** Manager Performance Review – NSW Self Insurance Corporation
- **Tim Holden** Executive Director, Water Legal – NSW Office of Water
- **Alex O'Mara** Manager, Legislation and Implementation – NSW Office of Water
- **Robert Rust** CEO – Health Infrastructure Corporation
- **Damian O'Connor** Director Commercial – Health Infrastructure Corporation
- **Anthony Lean** General Counsel, Legal and Governance Division – Department of Services, Technology and Administration
- **Karen Mobbs** Director of Proceedings – Health Care Complaints Commission
- **Jennifer Jude** Director, Native Title – NSW Land and Property Management Authority
- **Gavin Bartier** Acting Director, Property and Litigation – NSW Land and Property Management Authority
- **Barbara Jones** Director Legal Services – Department of Industry and Investment

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RESPECTED OUTCOMES

## Project Summary

The Legal Services Review Steering Committee, as part of NSW Treasury's Expenditure Review Directorate, has engaged *Allygroup* to assist in the implementation of a more co-ordinated and strategic approach to the procurement of legal services across the NSW Government.


The project objectives are:

- To assist agencies to ensure that Government expenditure on legal services is both efficient and effective; and
- To provide for continuous business improvement within agencies in their procurement and management of external legal service provision.

A key enabling strategy is the development of more efficient and effective legal services panels. The preferred governance model identified by the Legal Services Expenditure Review involves the establishment of cluster panels for major areas of Government activity centred on the eight super agencies. The project will also look at leveraging opportunities for smaller agencies.

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RESPECTED OUTCOMES

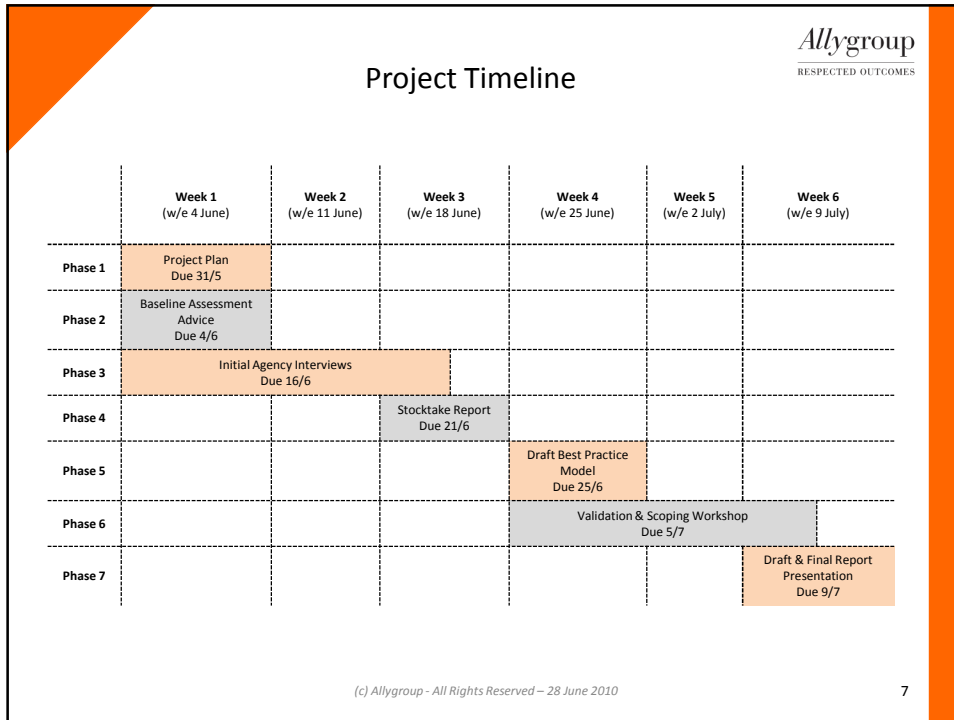
## Scope

The agencies within the scope of the project include, but are not limited to:

- Transport and Infrastructure;
- Education and Training;
- Human Services;
- Services, Technology and Administration;
- Environment, Climate Change and Water;
- Department of Justice and Attorney General;
- NSW Health; and
- The Police and Emergency Services agencies.

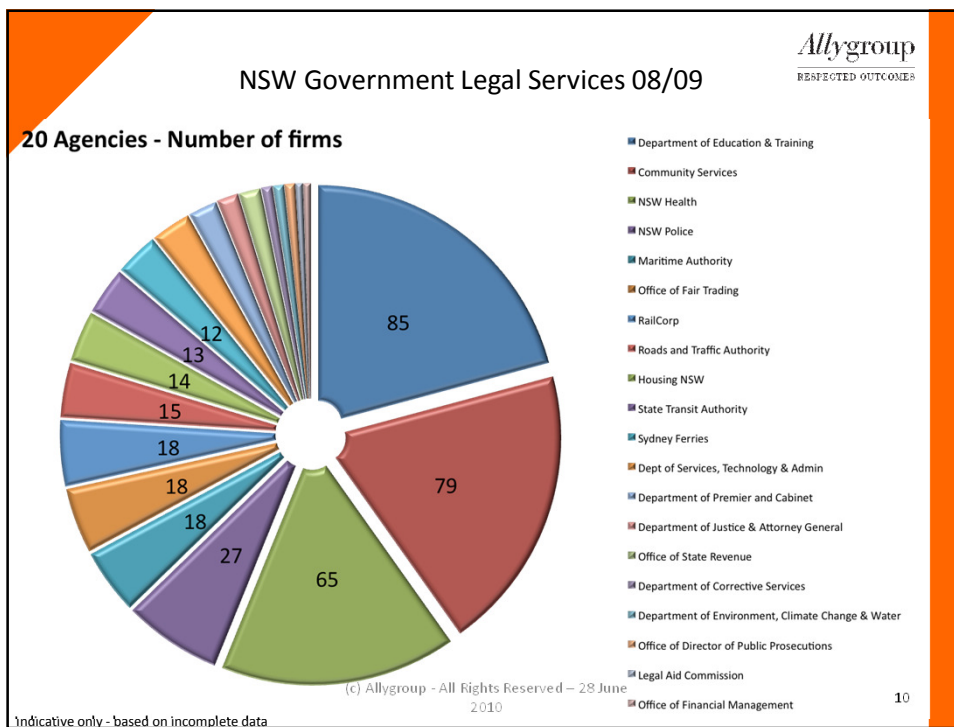
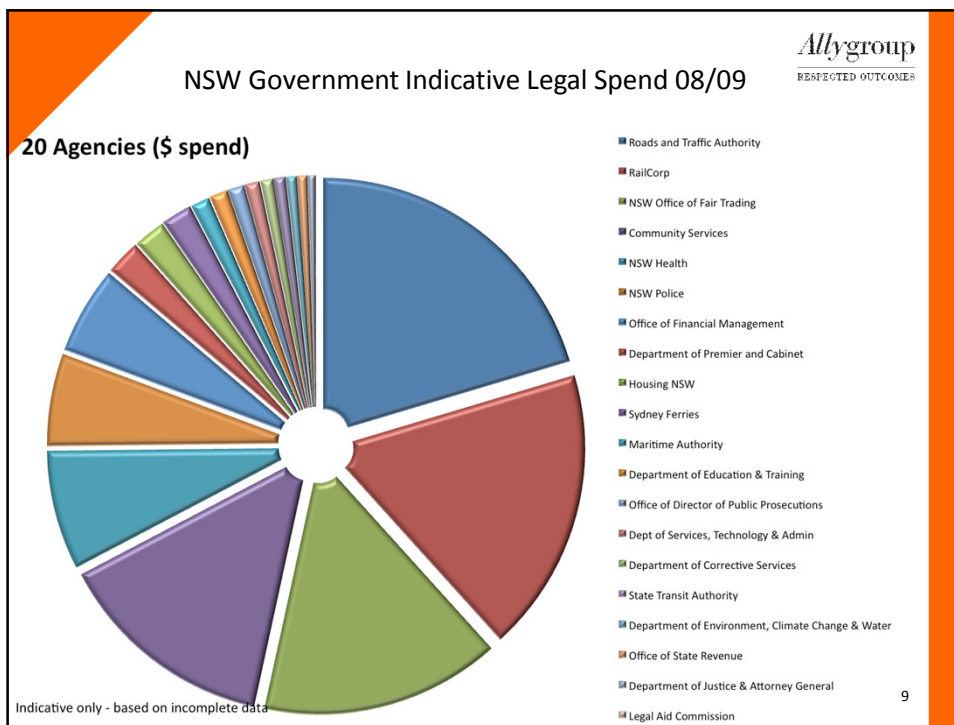
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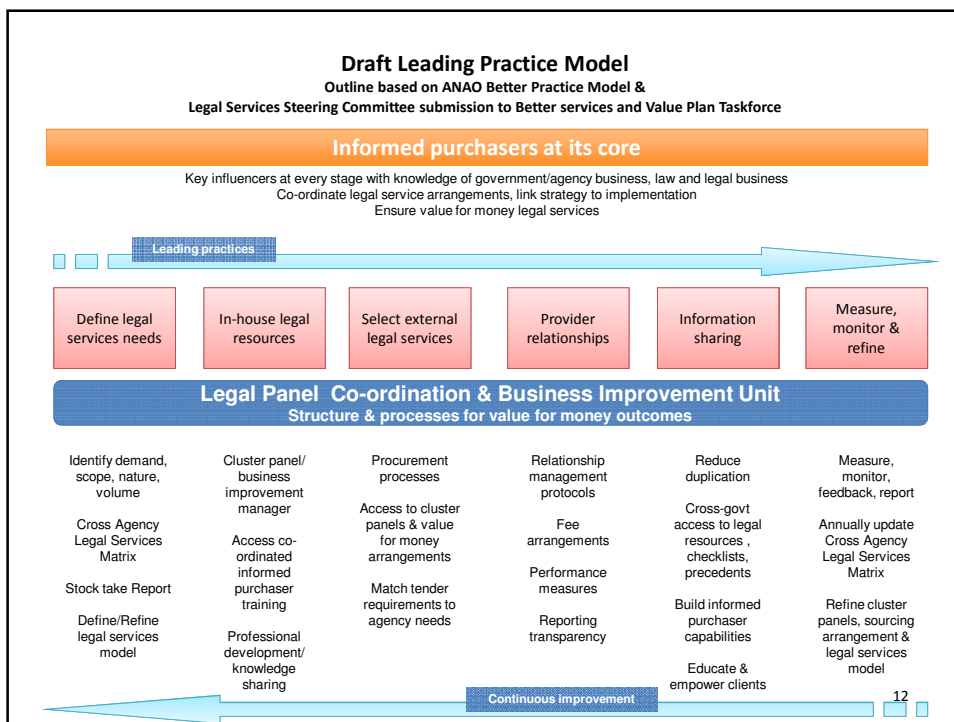
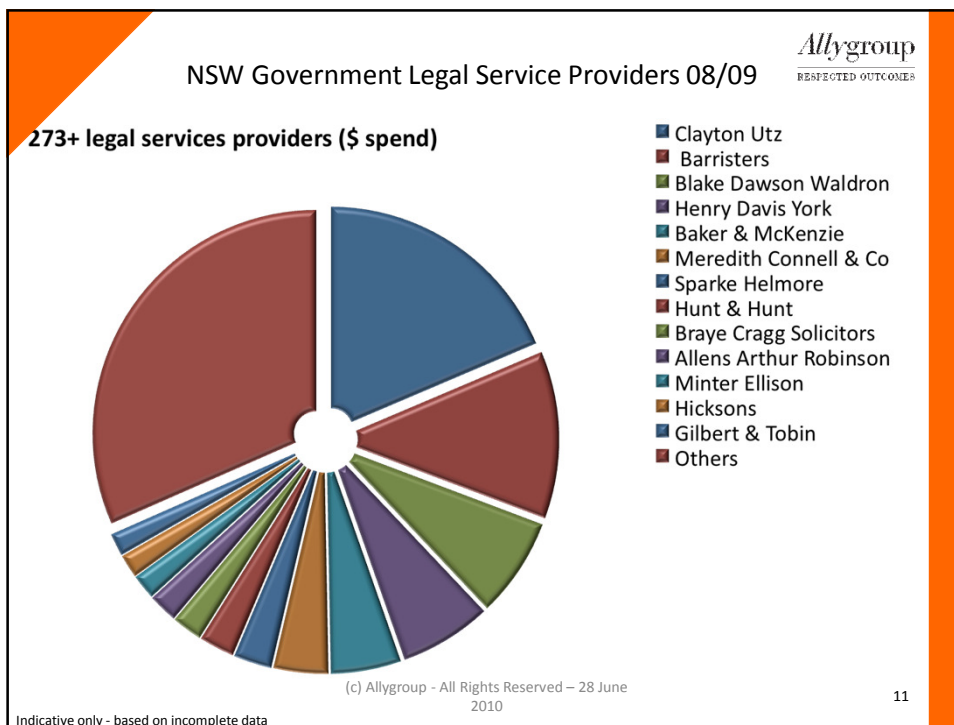
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- ### Interview List
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RESPECTED OUTCOMES
- NSW Self Insurance Corporation
  - NSW Department of Environment, Climate Change and Water
  - NSW Department of Education and Training
  - NSW Department of Human Services
  - Communities NSW
  - NSW Department of Health
  - NSW Department of Justice and Attorney General
  - NSW Department of Planning
  - NSW Department of Industry and Investment (*Primary Industry, NSW Food Authority*)
  - NSW Police
  - NSW Department of Services, Technology and Administration
  - NSW Department of Transport and Infrastructure (*Legal Executive Steering Committee*)
  - NSW Land and Property Management Authority (*Lands, State Property Authority*)
  - Workcover NSW
  - Health Infrastructure Corporation
  - Health Care Complaints Commission
  - NSW Office of Water
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# Stocktake Report Summary

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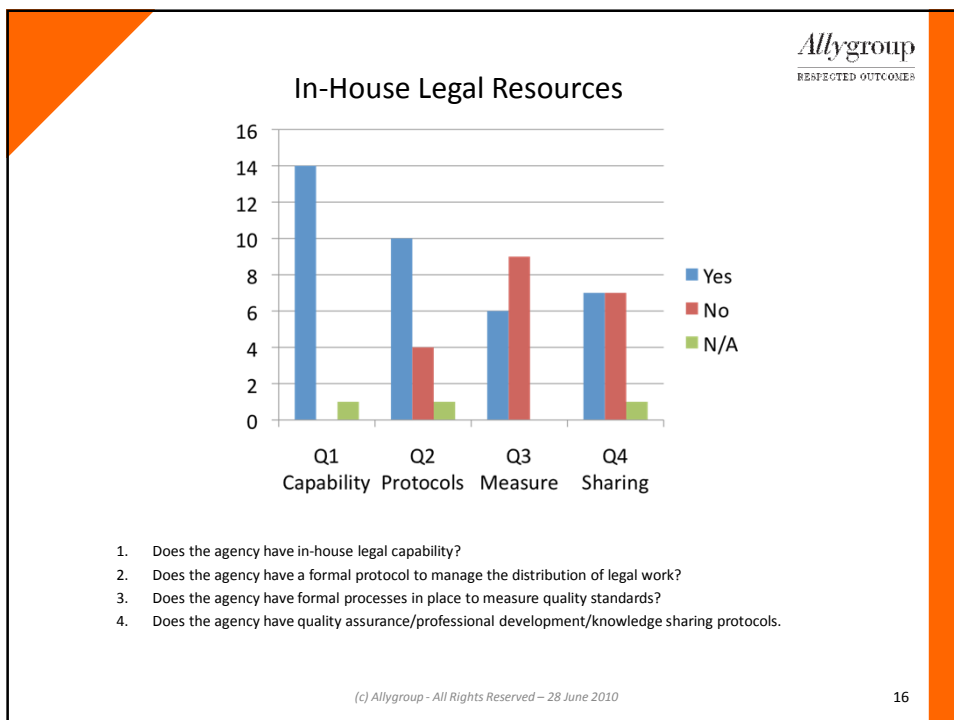
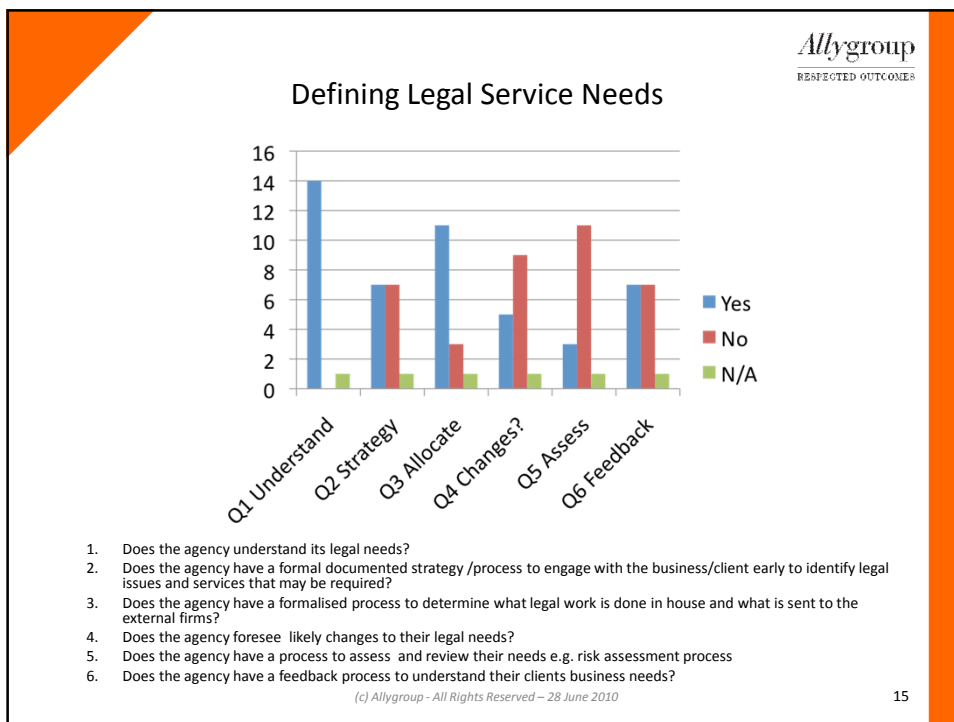


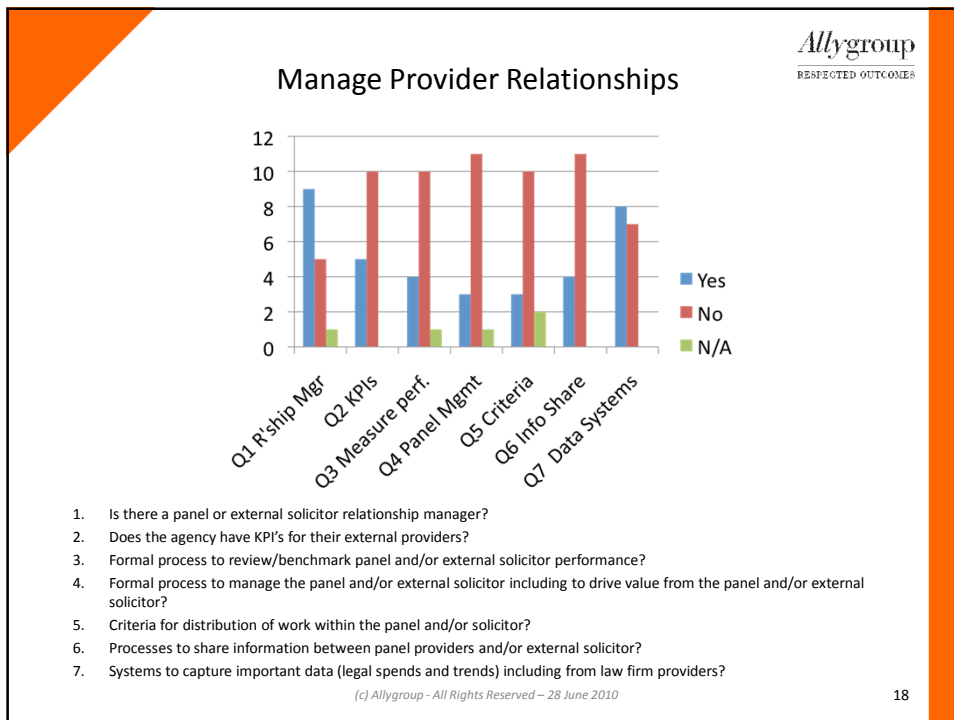
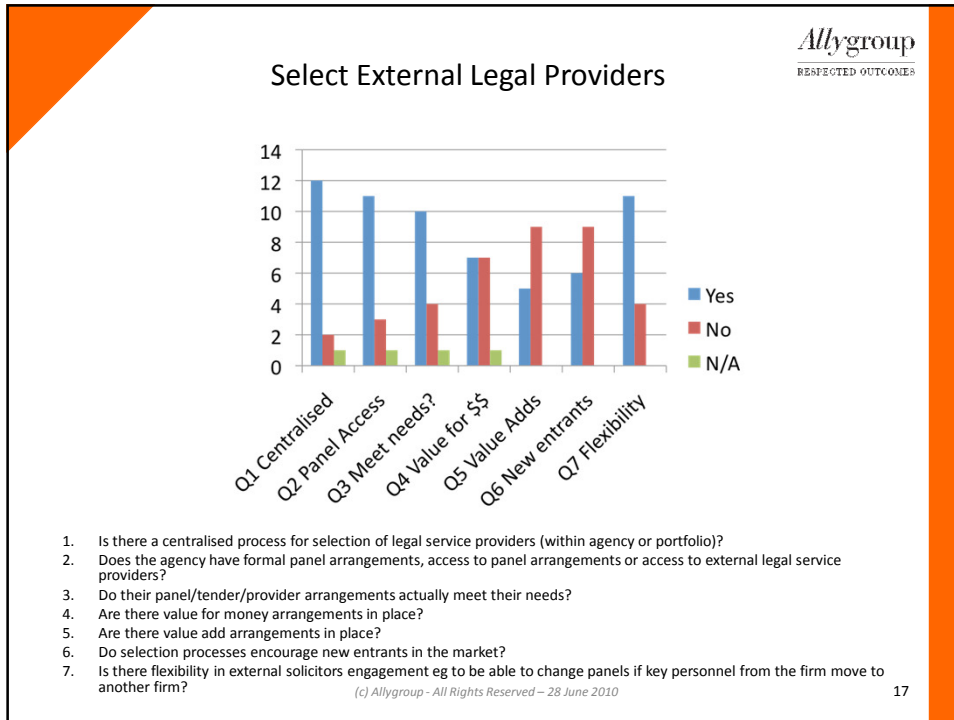
# Stocktake Report Summary

- 17 agencies interviewed
- Interview findings discussed and evaluated by working group core team
- Dec 09 Survey results also reviewed in that process – those results absorbed into the process
- Common “leading practices” framework developed by working group core team
- Series of questions then posed to help capture detail and overall framework
- Answers to the questions are presented in black and white, though in reality the answers are often a case of degree and contextual

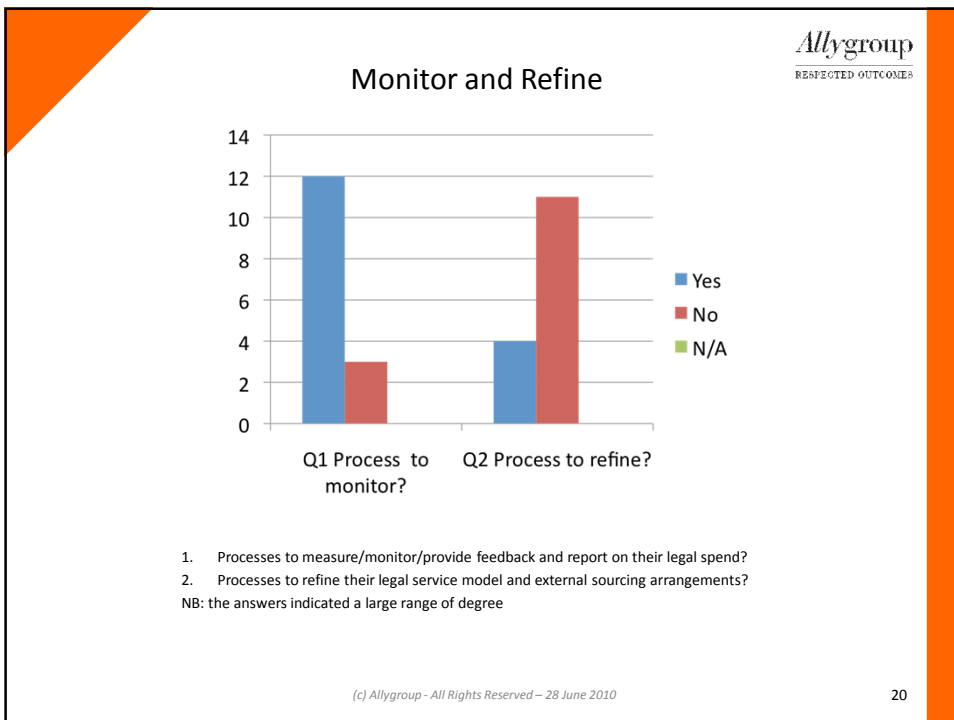
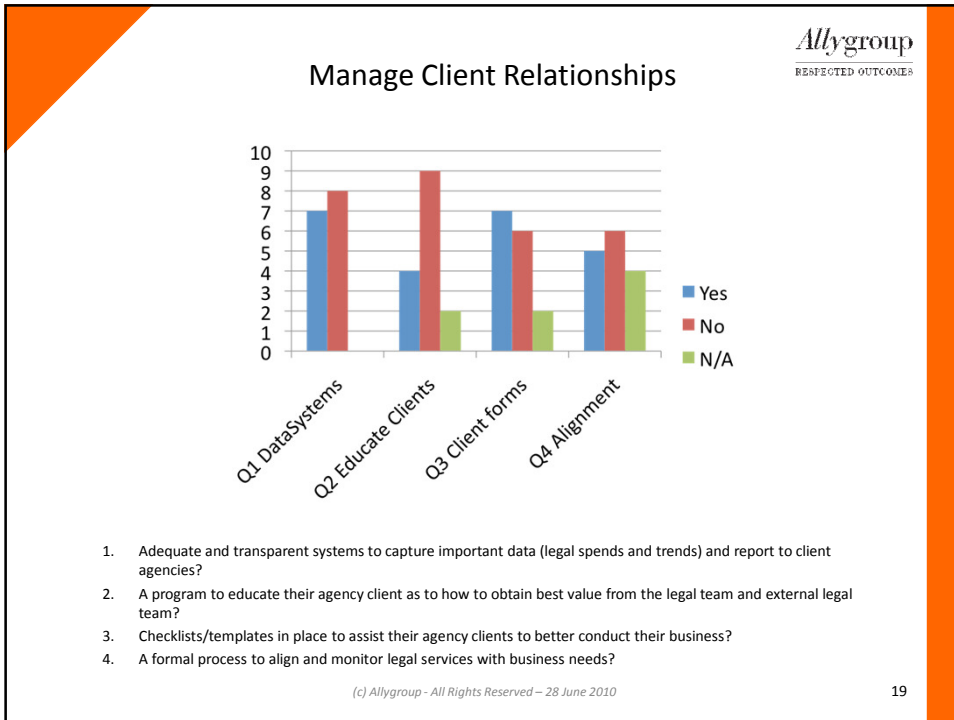
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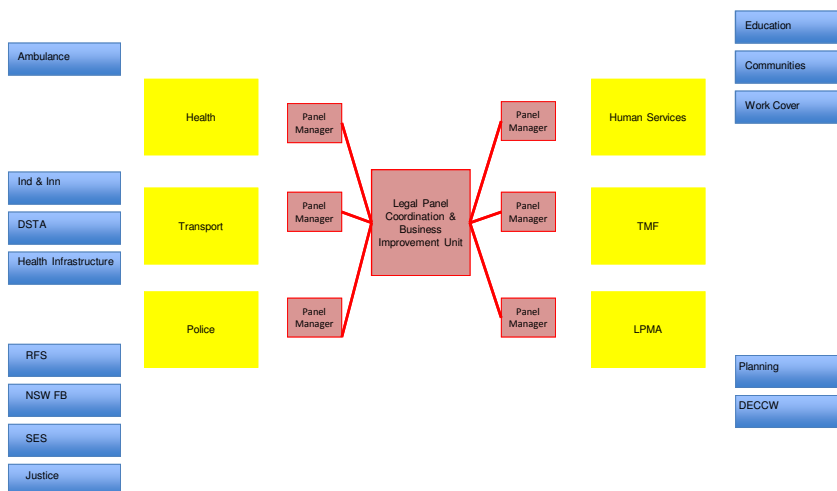


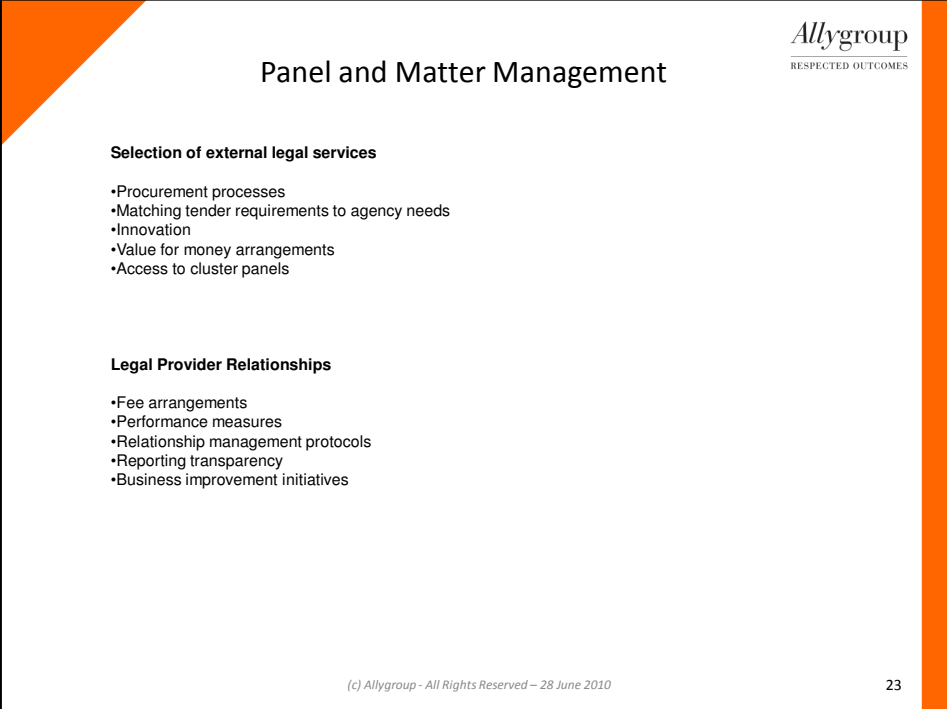




# NSW Government Legal Services Leading Practice Model

## NSW Legal Services – Recommended Clusters & Piggy-Back Arrangements





*Allygroup*  
RESPECTED OUTCOMES

## Panel and Matter Management

**Selection of external legal services**

- Procurement processes
- Matching tender requirements to agency needs
- Innovation
- Value for money arrangements
- Access to cluster panels

**Legal Provider Relationships**

- Fee arrangements
- Performance measures
- Relationship management protocols
- Reporting transparency
- Business improvement initiatives

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The  
Treasury

## DOCUMENT 2

Contact: Paul Davies  
Telephone: (02) 9228 3754  
Our Reference: EA1662104  
Your Reference: N/A

Mr X XXXXXXX  
Director General  
Department of XXXX  
GPO Box XX  
Sydney NSW 2001

Dear Mr XXXXX

### TMF LEGAL SERVICES PANEL

SI Corp is committed to ensuring that its procurement and use of external legal services delivers value for money. To this end, and in accordance with the Attorney-General Department's Legal Services Blueprint dated August 2011, SI Corp will be establishing a state-wide legal panel arrangement to conduct TMF litigation. Once the panel is operational, all legal services will be procured through the panel, and departments and agencies will not be able to brief external legal firms that are not represented on the panel.

By introducing the TMF Legal Services Panel, SI Corp will drive better practices in procurement and ensure we maximise the value obtained from law firms. Indeed there is potential for SI Corp to realise savings of 20 per cent within two years through the implementation of:

- a framework for innovative fee arrangements;
- performance management of external legal service providers;
- a project management approach to major and complex cases; and
- continuous improvement.

SI Corp plans to have the panel arrangements in place by 31 August 2012 and will keep you informed of any changes to the proposed timeline.

SI Corp has engaged Allygroup to work with us to establish the panel. Allygroup will be in contact with your general counsel in the near future to provide further information about the process for establishing the panel. The process will include interviews with key agencies and a workshop involving relevant general counsel.

Yours sincerely

Philip Gaetjens  
Secretary

[SENT MAY 2012]

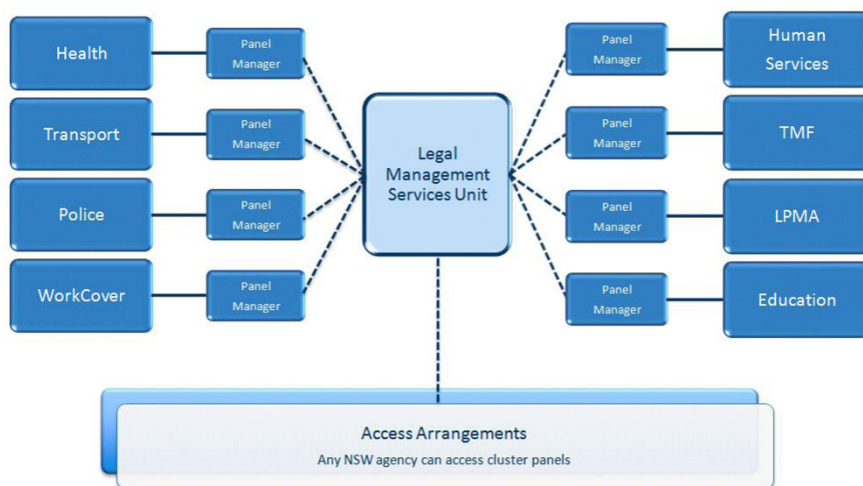
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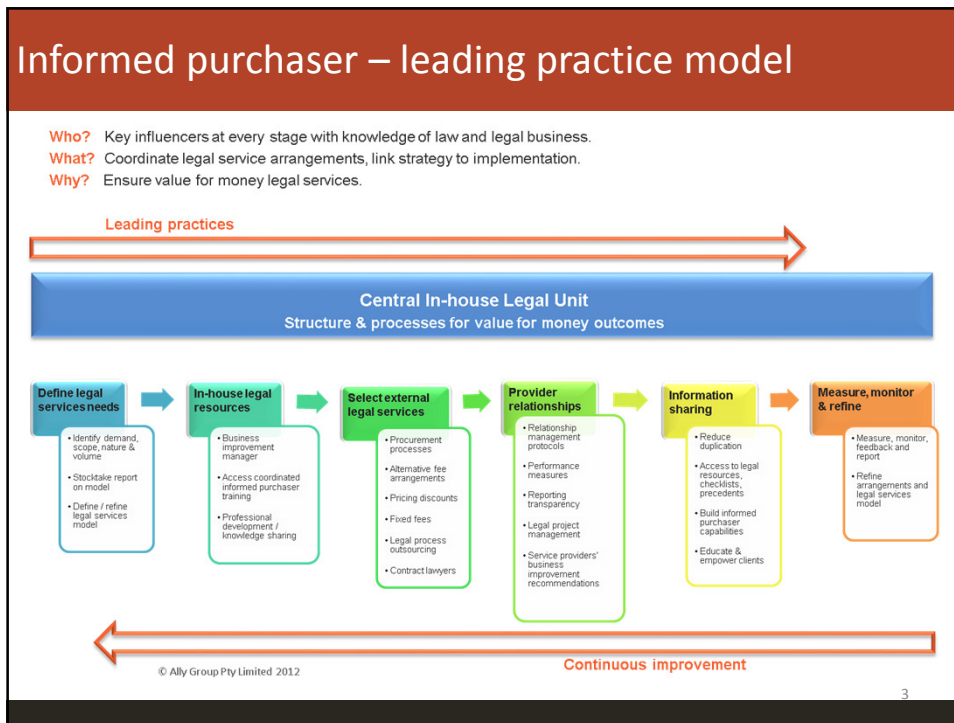


New South Wales Government  
NSW Self Insurance Corporation

Presentation to NSW General Counsel on TMF  
whole of government legal services panel  
Monday, 4 June 2012

## Design of Legal Services Cluster Panel Arrangements in NSW Government





## TMF Legal Spend by Agency for FY2011

Legal Spend for FY2011	Health Liability	General Liability	Motor Vehicle Liability	Property Liability	Workers' Compensation Liability	Total Legal Spend
Department of Health Administration	\$20.54M			\$0.02M	\$0.02M	\$20.57M
NSW Police Force		\$14.28M	\$0.10M		\$3.88M	\$18.27M
Department of Education and Training		\$3.86M	\$0.01M		\$5.38M	\$9.25M
Roads and Traffic Authority of NSW		\$2.44M	\$0.01M	\$0.77M	\$1.75M	\$4.98M
NSW Rural Fire Service		\$2.99M			\$0.01M	\$3.00M
Department of Environment, Climate Change and Water		\$2.42M			\$0.20M	\$2.62M
Department of Services, Technology and Administration		\$1.05M			\$0.79M	\$1.83M
Corrective Services		\$1.65M		\$0.01M	\$0.08M	\$1.74M
Department of Aging, Disability and Home Care		\$0.53M			\$0.97M	\$1.51M
All Agencies with legal spend of less than \$1M		\$4.05M	\$0.15M	\$0.02M	\$9.1M	\$13.31M
<b>Total</b>	<b>\$20.54M</b>	<b>\$33.26M</b>	<b>\$0.28M</b>	<b>\$0.82M</b>	<b>\$22.18M</b>	<b>\$77.08M</b>

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## Top Law Firms by Total TMF Expenditure

(in AUD)

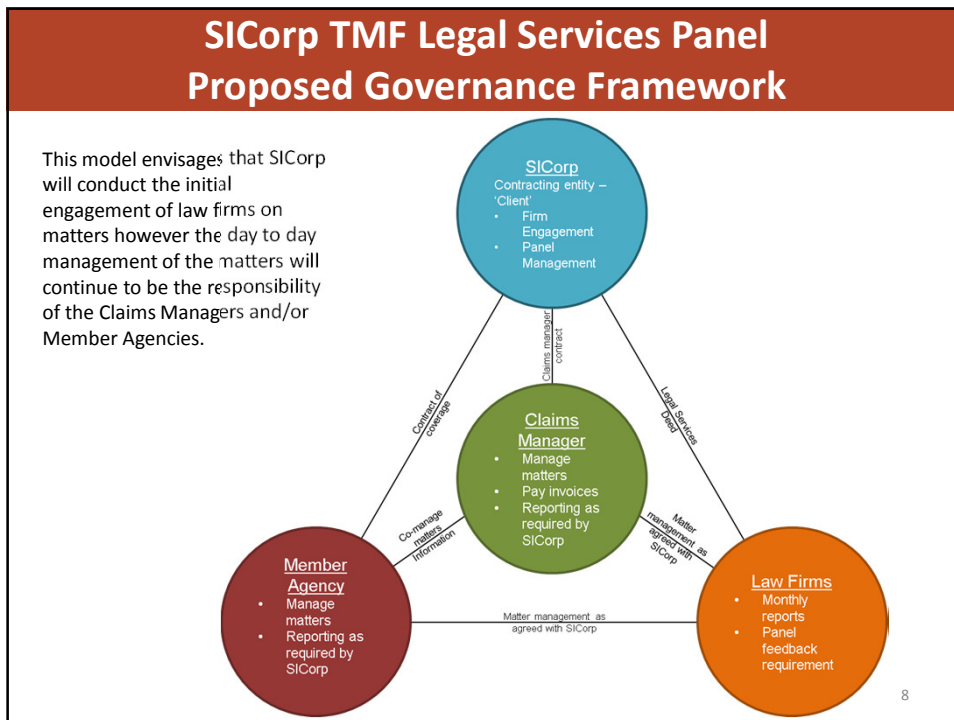
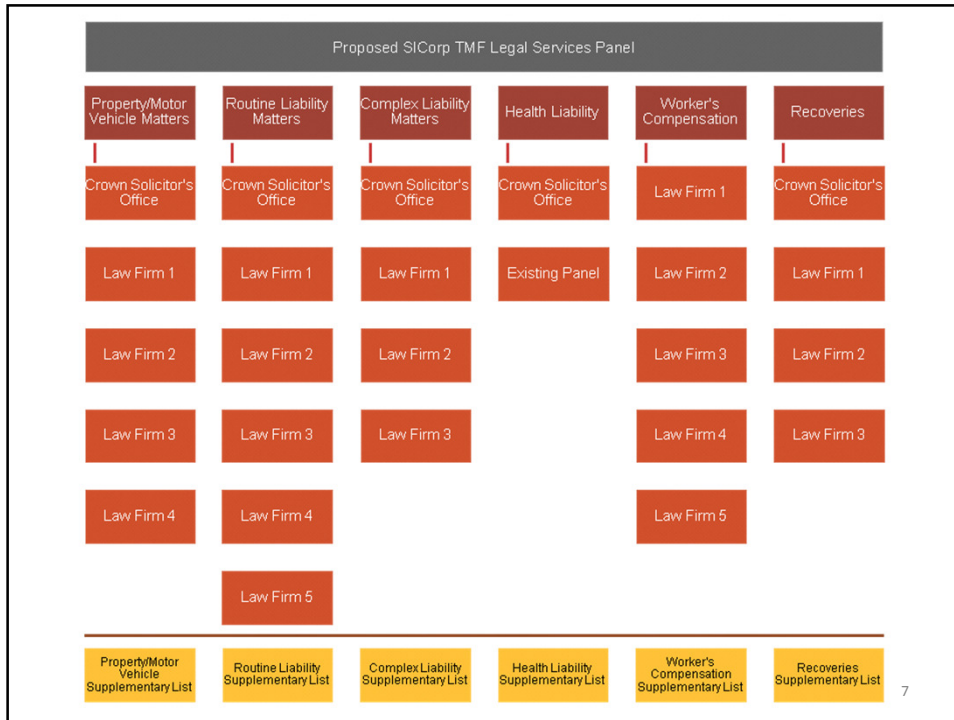
Law Firm	2010	2011	2012	Total
GILD INSURANCE LITIGATION P/L	14,118,590	13,429,511	3,277,434	30,825,535
CROWN SOLICITORS OFFICE	13,506,956	13,603,876	3,292,556	30,403,388
HICKSONS LAWYERS	4,215,791	4,168,708	913,491	9,297,991
HENRY DAVIS YORK LAWYERS	2,838,850	4,556,542	1,395,225	8,790,617
SPARKE HELMORE	3,155,267	3,067,311	560,694	6,783,271
TURKS LEGAL	1,784,670	1,543,977	280,405	3,609,053
MORAY & AGNEW	1,599,952	1,528,650	323,839	3,452,441
MCCABE TERRILL LAWYERS	1,622,317	1,056,826	187,651	2,866,794
TRESSCOX LAWYERS	1,250,076	1,063,124	290,192	2,603,391
CLAYTON UTZ SOLICITORS	1,028,082	1,537,743	30,795	2,596,620
SLATER AND GORDON	828,274	1,081,256	171,763	2,081,292
BARTIER PERRY	1,215,386	666,492	121,287	2,003,166
RANKIN NAHTAN LAWYERS	1,116,998	723,146	139,018	1,979,163
MCLEAN LAWYERS	652,593	937,368	187,842	1,777,803
MAKINSON & D'APICE LAWYERS	533,566	881,867	250,456	1,665,889
DLA PHILLIPS FOX	995,751	636,680	-	1,632,431
DLA PIPER		613,385	182,174	795,559
SMUTS MCKENZIE	648,671	498,308	27,549	1,174,527
LESLIE HARGRAVE LAWYERS	471,737	591,910	82,975	1,146,622
SMK LAWYERS	11,148	881,804	227,918	1,120,870
FEDERATION LAW PTY LTD	858,641	203,521		1,062,162

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## Current indicative timeline

- Prepare approach to market:  
RFT documentation finalised by 13 July 2012
- Approaching the market:  
RFT documents issued to market on 17 July 2012  
Industry briefing on 24 July 2012  
Tenders to be submitted by 17 August 2012
- Evaluating proposals and finalising contracts  
Evaluation conducted from 20 August 2012  
Contracts signed by 8 October 2012
- Panel implementation  
Panel inductions and start-up workshops conducted on 10 October 2012
- Agency panel transition arrangements to be determined

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New South Wales Government  
NSW Self Insurance Corporation

Presentation to NSW General Counsel on TMF whole of government legal services panel  
Monday, 4 June 2012

**List of Attendees**

1. Joanne Rees – Allygroup
2. Craig Allsopp – Allygroup
3. Timothy Bye – Allygroup
4. Jennifer Dymond – Allygroup
5. Caterina Cavallaro – Allygroup
6. Steve Hunt – SICorp
7. Paul Davies – SICorp
8. Carlos Gomez – SICorp
9. Joseph Diaz – Sydney Water
10. Mandy Eagle – Sydney Water
11. James Millar – Sydney Water
12. Terry Natsja – Sydney Water
13. Alana Starke – Sydney Water
14. Warwick Smith – Procure Group
15. Christine Hanson – Department of Planning
16. Clair Hodge – NSW Police
17. Lida Kaban – DJAG
18. Jennifer Mar-Young – DJAG
19. Mark Kelly – Office of Environment and Heritage
20. Robert Leach – GIO
21. Rachel McCallum – Department of Premier and Cabinet
22. John Murn – Department of Education
23. Patrick O'Meally – NSW Fire Brigades
24. Leanne O'Shannessy – Department of Health
25. Christine Roach – RFS
26. John Simon – Department of Corrective Services
27. Jeevani Korathota – Family and Community Services
28. Rod Best – Family and Community Services
29. Barbara Jones – Department of Trade and Investment, Regional Infrastructure and services
30. Tim Holden - Department of Trade and Investment, Regional Infrastructure and Services
31. Victoria Abigail – Education and Communities
32. Brad Cole – DFS
33. Bradley Tait – Suncorp
34. Eahrena Mitchelson – Suncorp
35. Kingsley Perry – DFS

Apologies:

- Katrina Mottee – Allygroup  
Rory O'Connor – O'Connor Marsden  
Gordon Plath – Environment and Heritage

# DOCUMENT 4

**From:** Katrina Mottee  
**Sent:** Wednesday, 6 June 2012 7:12 PM  
**To:** 'Alana Starke (alana.starke@sydneywater.com.au)'; 'Christine.Roach@rfs.nsw.gov.au'; 'hodg1cla@police.nsw.gov.au'; 'Jennifer Mar\_Young (jennifer\_mar\_young@agd.nsw.gov.au)'; 'Mark.Kelly@environment.nsw.gov.au'; 'christine.hanson@planning.nsw.gov.au'; 'Leanne O'Shannessy (losha@doh.health.nsw.gov.au)'; 'John.Simon@dcs.nsw.gov.au'; 'john.murn@det.nsw.edu.au'; 'patrick.omeally@fire.nsw.gov.au'; 'Rachel McCallum'; 'lida\_kaban@agd.nsw.gov.au'; 'jeevani.korathota@communities.nsw.gov.au'; 'rod.best@communities.nsw.gov.au'; 'gordon.plath@environment.nsw.gov.au'; 'barbara.jones@industry.nsw.gov.au'; 'victoria.abigail@det.nsw.edu.au'; 'kingsley.perry@services.nsw.gov.au'  
**Cc:** Joanne Rees  
**Subject:** SICorp Legal Services Panel RFT - Agency Questionn  
**Attachments:** SICorp questionnaire for agencies (00037016).DOCX

Dear all

Further to the workshop that took place on 4 June 2012 regarding the SICorp Legal Services Panel RFT, the next stage in the information gathering process is to ask you, or your delegate, to complete the questionnaire attached to this email. Your responses will assist in ensuring that the RFT documentation contains information reflecting your agency requirements with regard to TMF matters.

Given that we are running to a tight schedule, it would be greatly appreciated if you could please provide your responses by **Tuesday, 19 June 2012**.

If you would prefer to provide your response in a face to face meeting, we are happy to arrange that.

Thank you in anticipation of your assistance.

Kind regards

**Katrina Mottee** | Director | **Allygroup**  
Level 14 Bligh Chambers, 25 Bligh Street Sydney NSW 2000  
P +61 2 9216 9800 | M +61 (0)405 449 983 | [katrina.mottee@allygroup.com.au](mailto:katrina.mottee@allygroup.com.au) | [www.allygroup.com.au](http://www.allygroup.com.au) | ACN 064 699 029

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# SICORP LEGAL SERVICES PANEL

## AGENCY GENERAL COUNSEL QUESTIONNAIRE

### CURRENT STATE

1. With what regularity do legal needs arise with respect to the Treasury Managed Fund ('TMF') (daily, weekly, ad hoc) and in what locations (Sydney, regional)?
  
2. How are these legal needs currently met?
  - a. What portion of the legal work is outsourced to an external legal services provider?
  - b. Who is responsible for commissioning the external services?
  - c. At what stage do you send the matters to the external legal services provider?
  - d. What is the deciding factor for when matters are referred to an external legal services provider?
  - e. What is your procurement practice when engaging external legal services providers?
  - f. What process do you follow to agree cost-estimates, fee arrangements and milestone dates?
  - g. Who, from a practical perspective, instructs the external legal services provider and handles the day to day interaction with the law firm?
  - h. Who is responsible for decision making with respect to an ongoing matter (for example, whether to accept a settlement offer and the amount)?
  - i. What role do you perform in the process vis-a-vis the claims manager?
  - j. Who is responsible for approving cost estimates, verifying law firm invoices and paying the law firm's fees?
  
3. If you use a panel for your external legal services procurement in relation to TMF matters:
  - a. How many panels do you currently use (please list) and how many law firms are on those panels?
  - b. Is the panel used only for TMF matters or does it cover other legal needs of your agency?
  - c. How do you distribute work among the panel law firms (ad hoc, rotating, specific needs)?
  - d. Do you have formalised legal services agreements with these panel firms and if so, when do those arrangements expire?

- e. Are there provisions for alternative fee arrangements (ie, other than hourly rates) and if so, what kind, are they utilised?
4. Provider relationships on TMF matters:
- a. How do you manage your external legal services providers/panel?
  - b. What process do you use to track costs against budget?
  - c. If you receive the law firm invoices, what process do you use to confirm the invoice is accurate?
  - d. Are there any service level agreements or key performance indicators that the external legal service providers must comply with? If so, what are they?
  - e. Do you provide feedback to legal service providers at the conclusion of a matter?
  - f. What process do you use to manage disputes with the provider?
  - g. Are there any processes for information sharing between your agency and the external providers?
5. Monitoring and reporting on TMF matters:
- a. Do you have any process to monitor performance of law firms and report back (internally or to SICorp)?

## **FUTURE STATE**

6. For the purpose of informing the content of the Scope of Required Services in the SICorp RFT for a TMF legal services panel, please provide your view of the required services that law firms must be able to perform, in the following categories:

(a) High Volume General Liability Matters

Please include reference to nature of advices particular to your agency (for example, advice on a particular set of legislative instruments or policy matters); courts/tribunals commonly involved; most common types of matters. What expertise must the law firms possess?

(b) Complex General Liability Matters

Please include your view of what defines a matter as 'complex' (both subject matter and value of claim); include reference to nature of advices particular to your agency (for example, advice on a particular set of legislative instruments or policy matters); courts/tribunals commonly involved; most common types of matters. What expertise must the law firms possess?

(c) Health Liability Matters (for NSW Ministry of Health only)

Please refer to the scope of required services your agency requires from TMF panel law firms, including the nature of advices particular to your agency, courts/tribunals most commonly involved and most common types of matters. What expertise must the law firms possess?

(d) Workers Compensation

Please include your view of the scope of required services that TMF panel law firms must be able to perform within this category with respect to your agency.

(e) Recoveries

Please advise whether your agency has any involvement in recovery matters (that is, SICorp's recovery from another liable party) and if so, the nature of that involvement.

(f) Property/motor vehicle/miscellaneous matters

Please include your view of the scope of required services that TMF panel law firms must be able to perform within this category with respect to your agency. What expertise must the law firms possess?

(g) Employment Law matters, including fidelity

Please include your view of the scope of required services that TMF panel law firms must be able to perform within this category with respect to your agency. What expertise must the law firms possess?

7. Number and type of providers for the SICorp TMF panel:

- a. How many external legal service providers do you believe are necessary to have access to, to ensure adequate resources and coverage for your TMF matters?
- b. What kind of law firms do you believe are necessary – large, medium, small, specialist?
- c. Do you believe there is there increased potential for conflicts of interest to arise in the cluster panel format? If so, how many law firms should be on the panel to ensure an adequate number of firms to choose from?

8. Practices for selecting, briefing and instructing a provider on TMF matters:

- a. What practices do you currently use that work well?

- b. Do you have a view on how these practices could be improved?
  
- 9. Process for agreeing cost estimates, fee arrangements and milestone dates on TMF matters:
  - a. What processes do you currently use that work well?
  - b. Do you have a view on how these practices could be improved?
  
- 10. Managing the panel and providers with respect to TMF matters:
  - a. What, in the following areas, works well in your current arrangement:
    - i. Templates for briefing, instructing and paying providers;
    - ii. Processes to track costs against budget;
    - iii. Processes to verify invoices;
    - iv. SLAs/KPIs;
    - v. Feedback to providers;
    - vi. Management of disputes;
    - vii. Information sharing;
    - viii. Monitoring and reporting.
  
  - b. Do you have a view on how practices in the above areas could be improved?

# DOCUMENT 5

**From:** Katrina Mottee  
**Sent:** Friday, 17 August 2012 11:59 AM  
**To:** 'paul.davies@treasury.nsw.gov.au'; 'Carlos Gomez (Carlos.Gomez@treasury.nsw.gov.au)'; Joanne Rees; Craig Allsopp  
**Subject:** FW: SICorp Legal Services Panel

All

I have sent an email as per the one below to the following agencies (the only agencies providing input to the RFT process):

1. Health (Leanne O'Shannessy and Deanne Tadros)
2. Police (Clair Hodge)
3. Education (Michael Waterhouse, John Murn and Victoria Abigail)
4. Sydney Water (Alana Starke and Terry Natsia)
5. DFS (Kingsley Perry)
6. Rural Fire Service (Christine Roach)
7. OEH (Mark Kelly)

Kind regards

**Katrina Mottee** | Director | **Allygroup**

Level 14 Bligh Chambers, 25 Bligh Street Sydney NSW 2000

P +61 2 9216 9800 | M +61 (0)405 449 983 | [katrina.mottee@allygroup.com.au](mailto:katrina.mottee@allygroup.com.au) | [www.allygroup.com.au](http://www.allygroup.com.au) | ACN 064 699 029

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**From:** Katrina Mottee

**Sent:** Friday, 17 August 2012 11:39 AM

**To:** 'Leanne O'Shannessy ([losha@doh.health.nsw.gov.au](mailto:losha@doh.health.nsw.gov.au))'; 'Deanne Tadros ([dtadr@doh.health.nsw.gov.au](mailto:dtadr@doh.health.nsw.gov.au))'

**Subject:** SICorp Legal Services Panel

Dear Leanne and Deanne

Thank you for providing input to the TMF Legal Services Panel RFT process. As you may be aware, the RFT was released to the market on 13 August 2012, with a tender closing date of 14 September. The release date was later than originally planned, to allow us time to receive and incorporate significant and helpful input from a number of agencies and SICorp claims managers. This combined effort has, we feel, generated a clear basis upon which SICorp can choose those firms providing the best value, both in terms of their fees and quality of service. Through this process we have also developed a set of service standards that law firms will be required to meet in order to ensure value is delivered.

We will update you once again when the RFT has been closed, however please do not hesitate to contact me in the meantime if you have any questions or concerns.

Kind regards

**Katrina Mottee** | Director | **Allygroup**

Level 14 Bligh Chambers, 25 Bligh Street Sydney NSW 2000

P +61 2 9216 9800 | M +61 (0)405 449 983 | [katrina.mottee@allygroup.com.au](mailto:katrina.mottee@allygroup.com.au) | [www.allygroup.com.au](http://www.allygroup.com.au) | ACN 064 699 029

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## QUESTIONS FOR CHANGE MANAGEMENT PROCESS FOR TMF LEGAL SERVICES PANEL

L = Legal  
 WC = Workers Compensation  
 VM = voicemail message

Stakeholder	Contact/s	Initial call	Questionnaire sent	Interview scheduled	Interview conducted	Report of interview prepared	Incorporated into straw man model
SiCorp	Paul Davies Account manager T: 9228 3754 E: <a href="mailto:paul.davies@treasury.nsw.gov.au">paul.davies@treasury.nsw.gov.au</a>  Carlos Gomez R: Performance manager T: 9228 3611 E: <a href="mailto:carlos.gomez@treasury.nsw.gov.au">carlos.gomez@treasury.nsw.gov.au</a>	31/8	31/8				
Department of Education and Training	John Murn (contact only) R: Legal Counsel T: E: <a href="mailto:john.murn@det.nsw.gov.au">john.murn@det.nsw.gov.au</a>	31/8	3/9	Joint interview with Michael Taylor and Peter McGhee booked for 10am, 12/9 DET office	✓	✓	✓
	Marnie O'Brien (WC) R: T: 9266 8945 E: <a href="mailto:marnie.obrien@det.nsw.gov.au">marnie.obrien@det.nsw.gov.au</a> Nicole O'Brien (Marnie's EA) T: 9266 8675 E: <a href="mailto:Nicole.obrien20@det.nsw.edu.au">Nicole.obrien20@det.nsw.edu.au</a>		3/9				
	Peter McGhee (L)/ Michael Taylor (WC) R: T: 9561 1129 E: <a href="mailto:Peter.McGhee@det.nsw.edu.au">Peter.McGhee@det.nsw.edu.au</a>	4/9	4/9				



Stakeholder	Contact/s	Initial call	Questionnaire sent	Interview scheduled	Interview conducted	Report of interview prepared	Incorporated into straw man model
Department of Health	Deanne Tadros R: Principal legal officer T: 9391 9612 E: <a href="mailto:dtadr@doh.health.nsw.gov.au">dtadr@doh.health.nsw.gov.au</a>	3/9	3/9	11.30am, 10/9 North Sydney	✓	✓	✓
Roads and Maritime Services	Rae Giffin R: Manager, Injury Management and Claims Services T: 8574 3670 E: <a href="mailto:rae.giffin@rms.nsw.gov.au">rae.giffin@rms.nsw.gov.au</a>	3/9	3/9	2pm, 7/9 Burwood office	✓	✓	✓
NSW Police	Clair Hodge (L) R: General counsel T: 8263 6209 E: <a href="mailto:hodg1cla@police.nsw.gov.au">hodg1cla@police.nsw.gov.au</a>  Inspector Chris Condon R: Staff officer, Office of the General Counsel T: 8263 6432 E: <a href="mailto:cond1chr@police.nsw.gov.au">cond1chr@police.nsw.gov.au</a>  Chantal Tipene Mark Hicks	3/9 (VM) 10/9	3/9	10am, 13/9 201 Elizabeth Street	✓	✓	✓
NSW Corrective Services	John Symon (L) R: Legal counsel T: 8346 1146 E: <a href="mailto:john.symon@dcs.nsw.gov.au">john.symon@dcs.nsw.gov.au</a>  Lincoln Chee (Attorney General) R: Lawyer T: 9224 5080 E:	3/9 (VM) 4/9	4/9	John to confirm availability	×	×	

Stakeholder	Contact/s	Initial call	Questionnaire sent	Interview scheduled	Interview conducted	Report of interview prepared	Incorporated into straw man model
Sydney Water	Terry Natsia (L) Laura Andrews (L) R: T: 8849 5383 E:	3/9 (VM)	31/8	Joint interview with Terry and Laura, 2.30pm, 13/9 Allygroup office	✓	✓	✓
GIO	Rebecca Staines (L) R: Team leader, TMF General Liability Claims T: 8121 3669 E: <a href="mailto:Rebecca.STAINES@suncorp.com.au">Rebecca.STAINES@suncorp.com.au</a>  David Kumar R: Team leader, TMF Health Liability Claims T: 8121 3704 E: <a href="mailto:dkumar@gio.com.au">dkumar@gio.com.au</a>  Trevor Brown R: Team Leader, TMF Property Liability Claims T: E:	3/9	3/9	Joint interview with Rebecca, David and Trevor 10am, 6/9, Suncorp office  Follow up interview conducted with Rebecca Staines 9/10	✓	✓	✓
EML	James Au R: Clients services manager T: 8071 3404 E: <a href="mailto:j.au@employersmutual.com.au">j.au@employersmutual.com.au</a>  Bahlia Anderson R: Provider services manager T: 8071 3410 E: <a href="mailto:B.Anderson2@employersmutual.com.au">B.Anderson2@employersmutual.com.au</a>  Mark McKie Luke Roberts	31/8 (VM), 03/9	3/9	Joint interview with Bahlia, Mark and Luke 2pm, 12/9 EML office	✓	✓	✓

Stakeholder	Contact/s	Initial call	Questionnaire sent	Interview scheduled	Interview conducted	Report of interview prepared	Incorporated into straw man model
Allianz	Mark Pittman R: TMF claims operations manager T: 9017 2052 E: <a href="mailto:mark.pittman@allianz.com.au">mark.pittman@allianz.com.au</a>	31/8	3/9	Joint interview with Paul and Nadia at 2pm, 5/9	✓	✓	✓
	Paul Hillard R: Performance & Technical Manager T: 9017 2133 E: <a href="mailto:Paul.Hillard@allianz.com.au">Paul.Hillard@allianz.com.au</a>	4/9	4/9				
	Nadia Ramzy R: Specialist Team Leader T: 9017 2140 E:	4/9 (VM)	4/9				
QBE	David Bacon R: TMF claims operations manager T: 9375 4596 E: <a href="mailto:david.bacon@qbe.com">david.bacon@qbe.com</a>	31/8	3/9	T/Conference 1pm, 5/9	✓	✓	✓
Technology provider (when appointed)	TBA						

## QUESTIONS FOR CHANGE MANAGEMENT PROCESS FOR TMF LEGAL SERVICES PANEL

Please consider responses to each of the questions below in respect of all workers compensation claims and other claims you handle (e.g. general, complex, employment, health, protective actions).

Please identify any documents that relate to your answers to any of the questions.

Questions	Responses	Relevant Documents
<p><b>1. RESPONSIBILITES/DELEGATIONS FROM SICORP</b></p> <p>What are your current responsibilities/SICorp delegations in relation to the conduct of TMF claims, by reference to the following categories:</p> <ul style="list-style-type: none"> <li>a. notification/acceptance of claim</li> <li>b. assessment of claim</li> <li>c. selecting and engaging law firm</li> <li>d. day to day instruction of law firm</li> <li>e. settlement instructions</li> <li>f. invoicing</li> <li>g. keeping parties informed</li> <li>h. complex claims</li> <li>i. closing of claims</li> <li>j. any other operational considerations</li> </ul> <p>What responsibilities/SICorp delegations do you believe you will need to have in relation to TMF claims under the new TMF panel?</p>		

Questions	Responses	Relevant Documents
<p><b>2. INTERNAL RESPONSIBILITIES/DELEGATIONS</b></p> <p>Where applicable, who within your organisation is responsible for the following aspects of TMF claims:</p> <ul style="list-style-type: none"> <li>a. notification/acceptance of claim</li> <li>b. selecting and engaging law firm</li> <li>c. day to day instruction of law firm</li> <li>d. settlement instructions</li> <li>e. invoicing</li> <li>f. keeping parties informed</li> <li>g. complex claims</li> <li>h. any other operational considerations</li> </ul>		
<p><b>3. CURRENT PROCESSES</b></p> <p>Does your organisation receive claims?</p> <p>How does your organisation receive claims?</p> <p>What is the current process followed when a claim is notified to your organisation?</p> <p>Who undertakes the initial assessment of the claim? Who takes responsibility for the conduct of the claim? Is this dependent on the value/significance of the claim?</p> <p>Who do you have to notify of the claim? Is this dependent on the value/significance of the claim?</p> <p>Who determines that a law firm needs to be engaged?</p>		

Questions	Responses	Relevant Documents
<p>Who authorises a law firm to be engaged?</p> <p>Who engages a law firm?</p> <p>What is the process used to engage a law firm?</p> <p>Who do you notify that you have engaged a law firm?</p> <p>Who then instructs the engaged law firm?</p> <p>Who receives reports from the law firm?</p> <p>Who do you have to report to on the progress of the claim (internal and external)?</p> <p>Who does this reporting?</p> <p>Who receives invoices from the law firm?</p> <p>Who processes invoices received from the law firm?</p> <p>Who has authority to settle a matter? Are there limits on this authority?</p> <p>Who is responsible for closing a matter?</p> <p>What is the process for closing a matter?</p>		

Questions	Responses	Relevant Documents
<p><b>4. PERFORMANCE MANAGEMENT</b></p> <p>Do you have any internal KPIs or other processes for monitoring the progress of matters?</p> <p>Do you have any systems for monitoring/performance management of matters?</p> <p>Who is responsible internally for monitoring progress of matters and performance of law firms?</p> <p>How is performance feedback provided to law firms?</p>		
<p><b>5. REPORTING</b></p> <p>What internal reporting do you think you will require from the panel management system?</p> <p>Who internally needs access to this reporting?</p> <p>What external reporting will you need to provide from the panel management system?</p> <p>Do you have any technical requirements for the format of reports (for example, to input into internal matter management systems)?</p>		

Questions	Responses	Relevant Documents
<p><b>6. PAYMENT OF INVOICES</b></p> <p>How are invoices received from law firms processed?</p> <p>What systems do you use to process invoices?</p> <p>Do you have any technical requirements for the format of invoices?</p> <p>Who approves the payment of invoices?</p> <p>Who undertakes the actual payment of invoices?</p> <p>How do you record that an invoice is received/paid?</p> <p>What process do you follow where an invoice is disputed?</p>		
<p><b>7. USERS OF TMF PANEL</b></p> <p>Who within your organisation will need to access the panel management system?</p> <p>What are the different roles that will need access to the system, and what will they need to be able to do:</p> <ol style="list-style-type: none"> <li>a. initiate new matters</li> <li>b. view current matters</li> <li>c. provide internal authorisations (i.e. manager needing to provide internal approval of engagement (NOT selecting a law firm).</li> <li>d. issue instructions</li> <li>e. capture the progress of a matter</li> <li>f. monitor the progress of a matter</li> <li>g. record performance information</li> </ol>		



Questions	Responses	Relevant Documents
<ul style="list-style-type: none"> <li>h. review performance information</li> <li>i. review invoices</li> <li>j. approve invoices</li> <li>k. close matters on the system</li> </ul> <p>Taking into account the above, are there clear categories of users that can be identified (e.g. instructors, approvers, reviewers etc)?</p> <p>What notifications would you ideally want to receive from the panel management system (i.e. receipt of advice, receipt of invoice, payment of invoice, costs variation request, etc)?</p>		
<p><b>8. CHALLENGES IN PROCUREMENT PROCESS</b></p> <p>What are the current challenges in procurement of legal services for TMF claims?</p> <p>Do you have any concerns regarding procurement of legal services using the new panel management system?</p> <p>Do you have any specialist or regional needs within any sub-panel?</p>		



Contact: Paul Davies  
Telephone: (02) 9228 3754  
Our Reference: EA311636

Mr X Xxxxxxx  
Director General  
Department of Xxxxxxxx  
Xxxxxxx  
Sydney NSW 2000

Dear Mr X,

### **Finalisation of TMF Legal Services Panel**

The NSW Self Insurance Corporation (SICorp) has finalised the Treasury Managed Fund (TMF) Legal Services Panel. The panel will begin operating on 1 August 2013. TMF agencies will be required to cease using their own arrangements for legal services for TMF claim matters.

The Legal Panel Management System (LPMS) will allocate the providers from the panel on a sequential basis, rotating fairly between providers. This is a contractual obligation between the TMF and the providers for legal services for TMF claim matters. As such procurement for legal services outside the panel will not be paid by the fund.

The tender evaluation team chose the most competitive and innovative tenderers, which will achieve the project outcomes for the NSW Government. Those outcomes include:

- Procuring cost effective, high quality Legal Services for the TMF
- Achieving transparency and accountability for expenditure and in performance
- Establishing innovative, alternate fee arrangements to provide certainty and control of costs
- Establishing and maintaining constructive and mutually beneficial relationships with Panel Firms to partner with SICorp
- Information sharing among Panel Firms, Member Agencies, Claims Managers and SICorp to ensure continuous improvement
- Reduction of duplication or unnecessary advices

Meeting these outcomes will result in better value for money services. Thank you for your assistance.

Yours sincerely

Philip Gaetjens  
Secretary

[SENT MAY 2013]



**SICorp TFM Legal Services Panel**

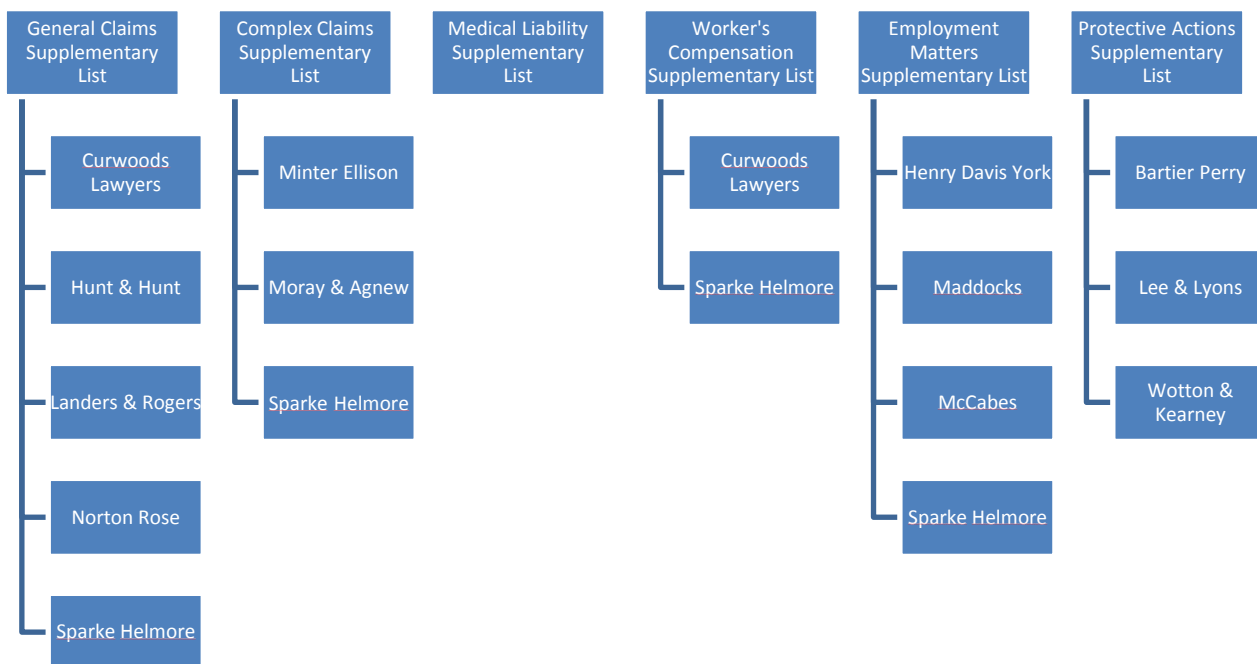
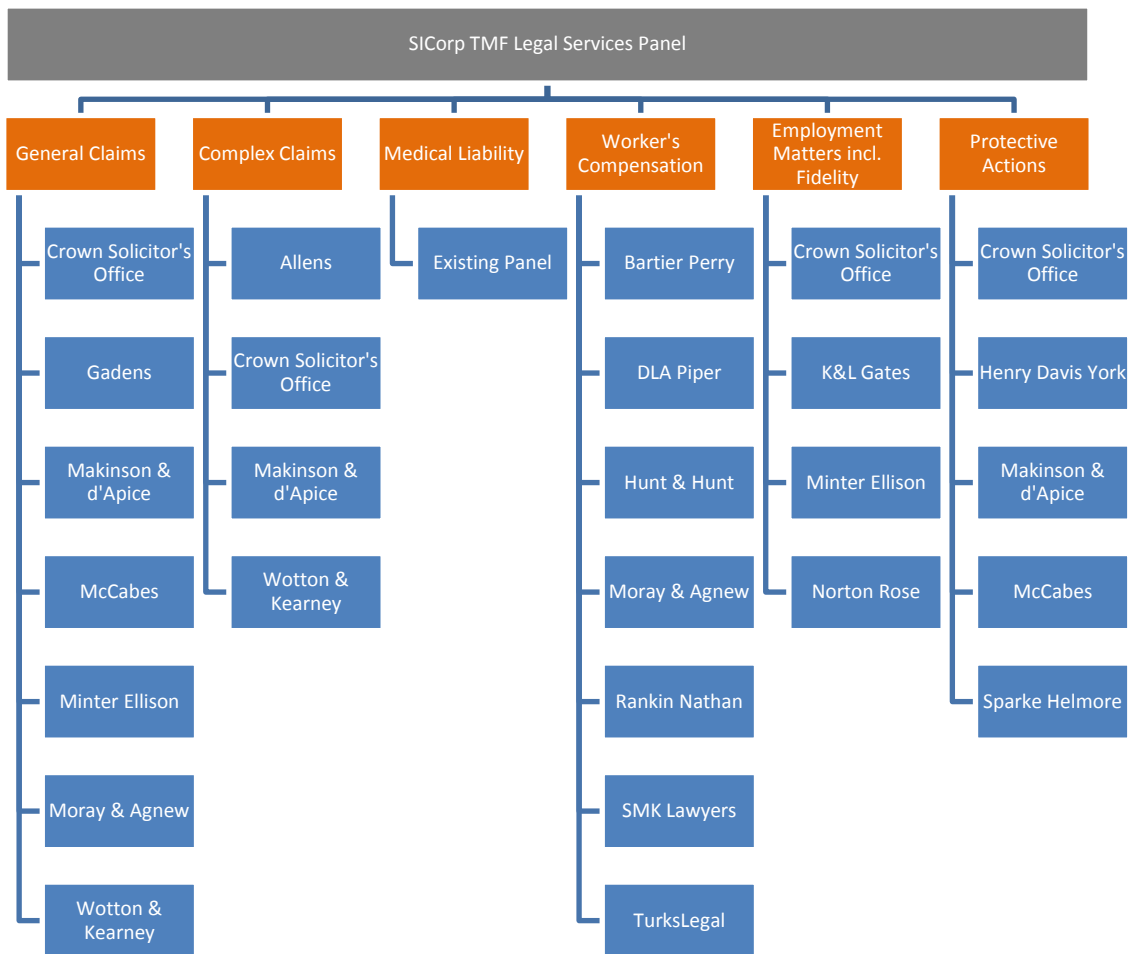
**Briefing Pack for Member Agencies | 13 June 2013**

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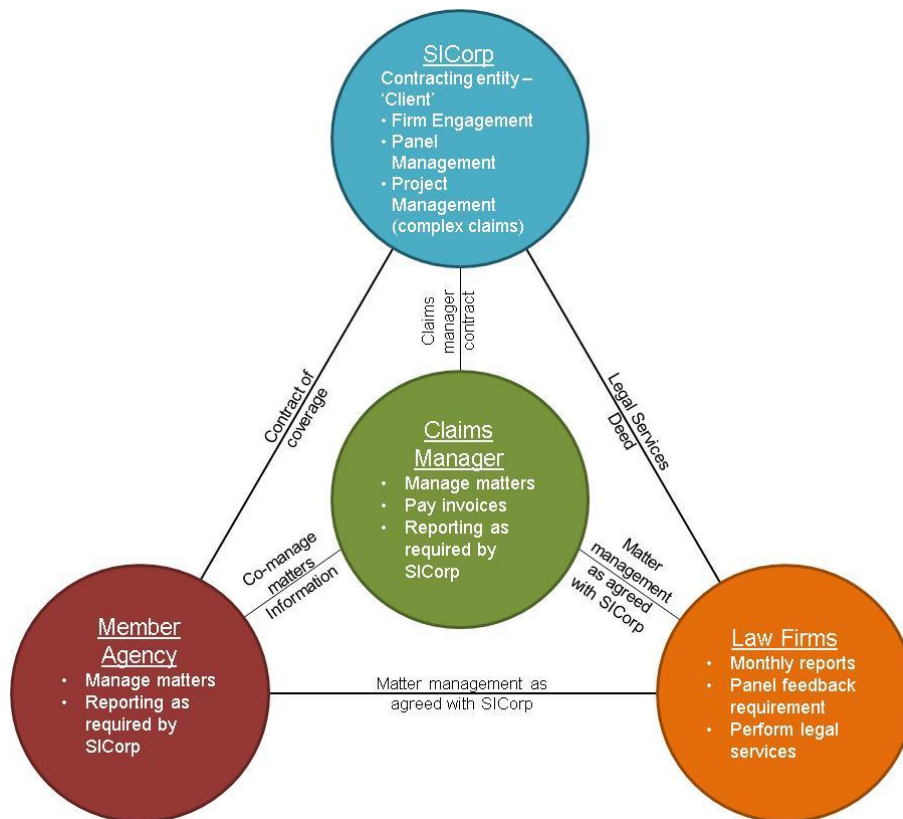
# 1. SICorp TMF Legal Services Panel Structure



## 2. SICorp TFM Legal Services Panel Governance

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### Panel Governance



The roles and responsibilities of SICorp, Claims Managers, key Member Agencies and Law Firms are set out below.

## **Roles and responsibilities for SICorp will include:**

### Firm Engagement

- contracting entity with legal services providers
- classify general liability matters according to risk and complexity
- select a legal services provider from the panel unless delegated to Claims Managers in the Delegations Manual (automated)
- respond to firm override requests
- obtain scope of works and cost estimate from legal service providers at the commencement of matters unless delegated to Claims Managers in the Delegations Manual
- provide initial instructions and approve cost estimates and strategy on Complex Claims
- project management of Complex Claims
- set fixed event/staged fees
- provide instructions on settlement in accordance with delegations
- managing the overall distribution of work to legal services providers in accordance with Panel arrangements and individual panel legal services provider performance

### Panel Management

- review and monitor KPIs;
- facilitate periodic meetings with legal services providers (individually and as a group);
- conduct periodic benchmarking of legal services providers;
- relationship management with panel legal services providers, including providing performance feedback

## **Roles and responsibilities of the Claims Managers will include:**

- selecting a legal services provider from the panel for matters as delegated by SICorp (automated)
- obtaining a scope of works and costs estimate with the legal services provider at the commencement of engagements as delegated by SICorp
- day to day conduct of matter
- information exchange between claims manager and agency as to progress of matter
- reporting panel legal services provider performance against KPIs to SICorp on the completion of matters (by way of survey)
- providing periodic reports on KPIs to SICorp to allow SICorp to benchmark panel legal services providers
- Claims Managers will also verify legal service provider invoices and pay amounts owing

## **Roles and responsibilities of Member Agencies will include:**

- day to day conduct of matter with Claims Manager
- information exchange between claims manager and agency as to progress of matter
- reporting panel legal services provider performance against KPIs to SICorp on the completion of matters (by way of survey)
- providing periodic reports on KPIs to SICorp to allow SICorp to benchmark panel legal services providers

## Roles and responsibilities of panel legal services providers will include:

- providing a scope of works and costs estimate at the commencement of an engagement
  - providing a detailed project plan for Complex Claims
  - comply with the service levels set out in Schedule 4 of the Legal Services Deed
  - comply with any structured fee arrangements prescribed by SICorp
  - provide alternative fee arrangement options in cost estimates where appropriate
  - provide invoices in the format specified by SICorp
  - provide Monthly Report as required by SICorp
  - provide value adds to SICorp, claims managers and/or member agencies as agreed in the Legal Services Deed
  - comply with information sharing requirements, such as attending whole of panel meetings, as set out in Schedule 3 of the Legal Services Deed
  - attend performance review meetings as required
-



### 3. SICorp TMF Legal Services Panel Law Firm KPIs

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Law Firms have a contractual obligation to comply with a number of service levels that are categorised according to the following KPIs:

- Timeliness (advices, reports, updates, invoices)
- Quality of service
- Cost estimates, cost management and billing
- Early resolution and settlement
- Engagement of Counsel
- Panel management and performance reviews
- Risk management and trend analysis
- Value add services

The panel management team will, on behalf of SICorp, monitor Law Firm performance against these KPIs, benchmark the Law Firms on a regular basis and conduct performance reviews with Law Firms

## **LIST OF ATTENDEES**

### **MEMBER AGENCY BRIEFING – 13 JUNE 2013**

1	Clare HODGE	General Counsel	NSW Police Force
2	Robert RODGERS	Manager, Employment Law Unit	NSW Police Force
3	Genevieve HAMBLY	Acting Manager, Insurance Litigation Unit	NSW Police Force
4	Chris DIKEMAN		Roads and Maritime Services
5	Luisa SIRIANNI	Lawyer, Litigation Inquiries	Roads and Maritime Services
6	Emma MODEL		Roads and Maritime Services
7	Wendy LOBLEY	Manager, Injury Management	Department of Corrective Services
8	TBA	TBA	Department of Corrective Services
9	Terry NATSIA	Corporate Claims Manager	Sydney Water
10	Laura ANDREWS	Claims Team Leader	Sydney Water
11	Shamini DUTT	Senior Claims Officer	Sydney Water
12	Michele MURPHY	Manager, Insurance & Risk	Department of Health
13	Stephen O'GORMAN	General Counsel	Transport for NSW
14	Lucy HOWES	Legal Counsel, Governance and Compliance	Transport for NSW
15	Melissa SLOANE	Office Manager	Transport for NSW
16	Rae GIFFIN	Principal Manager, Injury and Claims Management	Transport for NSW
17	Jennifer MAR YOUNG	Director, Legal Services Coordination	NSW Department of Attorney General & Justice
18	Victoria ABIGAIL	Principal Legal Officer	Department of Education & Communities
19	Margaret BAKER	Senior Legal Officer	Department of Education & Communities
20	Peter McGHEE	Senior Legal Officer	Department of Education & Communities

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## MEMORANDUM

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**TO:** KEY MEMBER AGENCIES  
**FROM:** JOANNE REES, ALLYGROUP  
**SUBJECT:** SICORP TMF LEGAL SERVICES PANEL COMMENCEMENT AND TRAINING DATES  
**DATE:** JULY 11, 2013

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We write to confirm arrangements for the TMF Legal Services Panel, which is administered by the NSW Self Insurance Corporation (**SICorp**).

<b>General, Complex Claims, Employment and Protective Actions Sub-Panels</b>
--

All sub-panels with the exception of the workers compensation sub-panel will commence operation on **1 August 2013**. The sub-panels commencing on 1 August 2013 date will be:

- General Claims
- Complex Claims
- Employment
- Protective Actions

The electronic legal panel management system known as the NSW Legal Panel Gateway (**LPG**) will commence on **19 August 2013** for all sub-panels (except workers compensation).

In preparation for the commencement of the new panel arrangements on 1 August 2013, the following will occur:

- **Week commencing 22 July 2013** - SICorp will be inducting panel firms.

- **1 August 2013** – All sub-panels (except workers compensation) commence.
- **Week commencing 12 August 2013** - SICorp will provide sub-panel firms with training on the LPG.
- **19 August 2013** – All sub-panels (except workers compensation) go live on the LPG.
- **Week commencing 26 August 2013 – SICorp will be providing LPG training to key member agencies.**

From 1 August 2013, all new engagements for sub-panels will be made under the TMF Legal Services Panel arrangements, as set out in the Legal Services Deed.

Between 1 August and 19 August 2013, matters will be allocated to sub-panel law firms on a sequential basis. SICorp will capture all procurement data in relation to engagements during this period. This data will be entered into the LPG before it goes live.

From 19 August 2013, the LPG will allocate work to sub-panel firms on an equitable basis, taking into account all engagements in the period from 1 to 19 August 2013. The LPG has the capability to automatically allocate new matters to ensure that the overall distribution of matters between firms is equal over the first quarter of operation of the TMF Legal Services Panel. The number of matters sent to particular sub-panel law firms may change in subsequent quarters, as set out in the Legal Services Deed.

Please provide us with the following details via email by **Thursday, 25 July 2013**:

- 1) Nominate **two** personnel from your agency to attend technology training on the LPG which will take place in the week of 26 August 2013.

## Workers Compensation Sub-Panel

The workers compensation sub-panel will commence on **16 September 2013**.

In preparation for the commencement of the new panel on 16 September 2013, the following will occur.

- **Week commencing 9 September 2013** - SICorp will be inducting firms on the workers compensation sub-panel including technology training.
- **16 September 2013** - The workers compensation sub-panel will commence operation.

Certain Member Agencies have expressed interest in providing information and training to law firms on their sub-panel in relation to how their agency operates. Please let us know if you are interested in providing this type of training to the relevant panel firms and if so, how long you anticipate this training would run and what you anticipate this training would involve. This will enable us to work with you and the panel firms to achieve this training in a timely manner.

We will contact you in August to confirm the date and details of member agency LPG training. Please contact Laila Ragupathy on (02) 9216 9800 or [laila.ragupathy@allygroup.com.au](mailto:laila.ragupathy@allygroup.com.au) should you have any enquiries.

Yours faithfully



Joanne Rees  
CEO