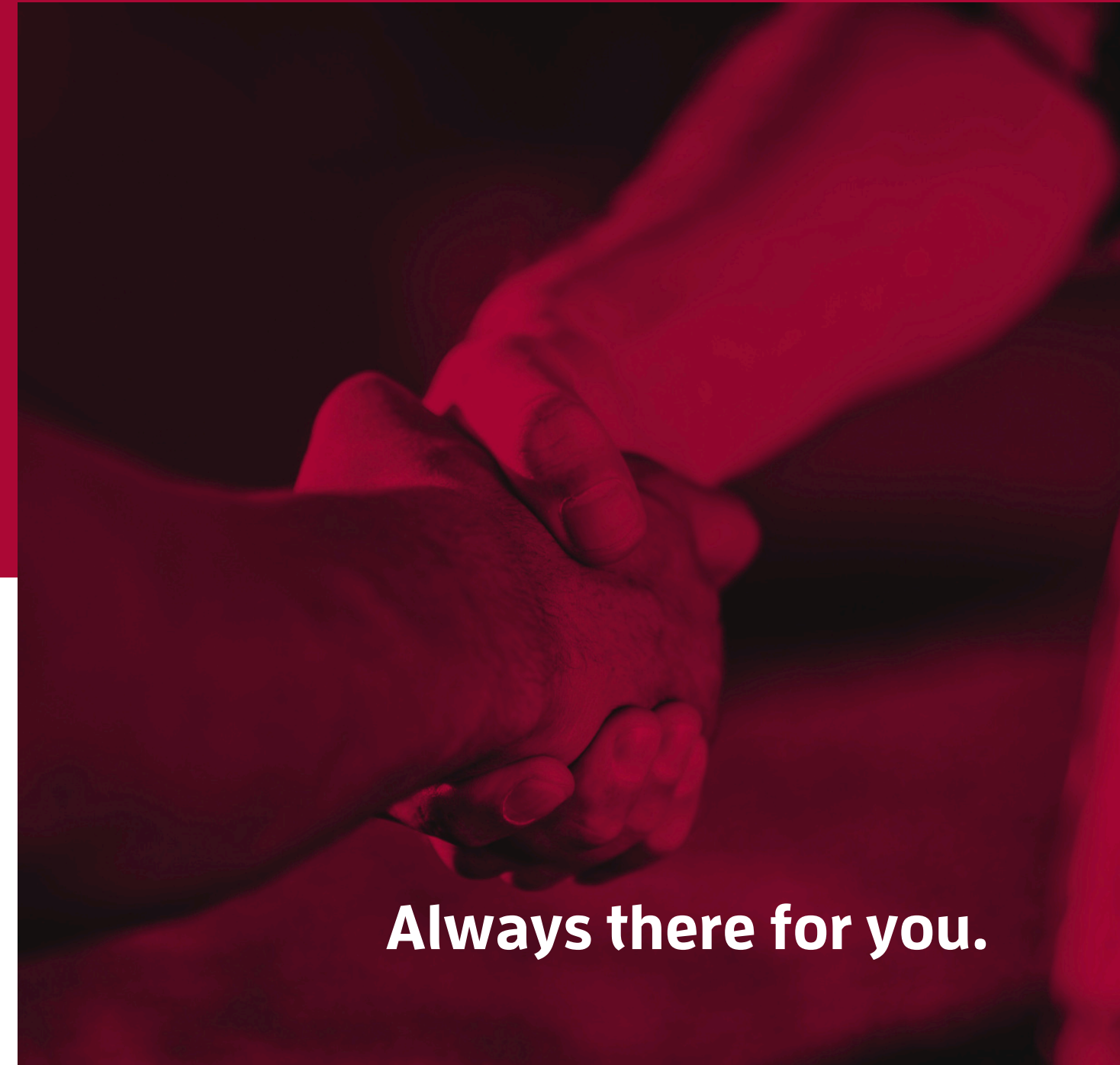


MORRISH SOLICITORS LLP

ANNUAL REVIEW

2023-24



Always there for you.



MANAGING PARTNER'S STATEMENT

Welcome to the firm's first annual review. The aim of this report is to help you understand more about what makes the firm tick, how we work, and what we are achieving.

The review sets out information on our performance over the past 12 months, and how we will achieve our goals in the coming year. It also sets out our new Environmental, Social and Governance (ESG) strategy, showing our commitment to the team, our community and the environment.

Our mission statement is clear: we want to be successful and well-regarded by both our trade union and individual clients, locally, regionally and nationally. We will achieve this by providing a wide range of legal services, providing high-quality advice and assistance, with exceptional client care.

The partners and I are proud of what the firm, our people and our clients have achieved over this past year, built upon our solid foundations and history dating back over 142 years. This deserves a huge thank you to all our staff and colleagues.

A handwritten signature in black ink, appearing to read 'D Sorensen', with a long horizontal flourish extending to the right.

DAVID SORENSEN
MANAGING PARTNER



MISSION STATEMENT

We want to be the most successful, best regarded trade union law firm in the UK and the most successful, best regarded law firm for individuals in West Yorkshire.

We will achieve this by providing high-quality advice, assistance, representation, and exceptional service to individuals (private clients, union members and officials) and by helping them with their lives.

OUR VALUES

1. Fairness

We will act fairly and even-handedly in all our dealings. We adhere to our policies on equality and diversity and treat everyone with respect.

2. Openness and Honesty

We will be honest with each other, sharing information across the firm where personal and/or commercial confidence does not require otherwise. We will explain honestly why some information cannot be shared; we will begin each information-sharing exercise with a presumption that information can and should be shared.

3. Communication

We will say clearly what is required and expected from others and clearly express our thoughts and ideas.

4. Innovation

We will be prepared to take risks and be comfortable in fast-changing environments, whilst looking positively and with an open mind at new ideas and proposals.

5. Effectiveness

We will work hard to achieve our objectives and ensure that we are trained and confident to do the work assigned to us. We will follow the Morrish practices and procedures, always seeking to go above and beyond for our clients, with our professional, but personable service. We endeavour to retain existing business and acquire new, working hard to ensure every client is happy with the level of service they receive. However, if and when complaints are made, we will ensure we manage them effectively.



SERVICES

We provide services to trade unions and associations, their members, and individual clients in: employment; personal injury; clinical negligence; residential property; family law; wills and estates; dispute resolution; professional negligence; criminal; inquests; and professional conduct and regulatory.

APPROACH

We all have a huge role to play in providing the best service to clients and promoting Morrish. This plan is based on our foundations of offering high-quality legal expertise, value for money, amazing client service, great communications, giving practical solutions and being available and accessible.

CORE STRATEGY

We want to be the most successful, best regarded trade union law firm in the UK and the most successful, best regarded law firm for individuals in our heartland of West Yorkshire. These two aims co-exist because we firmly believe in our responsibility to assist individuals.

We want to grow as a firm, across all teams and all areas of work, and we intend to make this happen by following these 10 steps:

- 1. To be a great employer with staff welfare being central at all times.**
- 2. By having a consistent, clear, positive and modern Morrish brand, which both reflects our history and forward-thinking outlook.**
- 3. Strong cyber security protection with a cyber policy which includes insurance, regular training, and contingency planning.**
- 4. By delighting and retaining all existing clients, trade unions and individuals.**

5. By being available, responsive, and communicative to clients be it face-to-face, by telephone, email or other means.

6. By increasing the amount of new work each year, gaining new clients and growing all areas of work.

7. Using and keeping up-to-date with the latest and best technology solutions.

8. A sustainable and agile homeworking strategy, plus increased digitisation and virtual meetings, reducing travel, paper and our environmental impact.

9. By applying a consistent and structured approach to time recording, costs recovery and credit control.

10. Implementing our Environmental, Social and Governance (ESG) Strategy, with regular involvement in charitable work, mentoring and apprenticeship schemes, with an emphasis on social justice and care for the environment.



ENVIRONMENTAL, SOCIAL & GOVERNANCE

The policy aims to integrate environmental, governance and social practises within our work, our client relationships, and the wider community.

By developing this ESG strategy, we aim to deliver gradual but continuous improvements in our performance every year. As a result, our approach is continuously evolving as we learn lessons along the way.

We believe that this ESG strategy will complement our core business strategy and values, and help us make quantifiable decisions which make sound ethical and business sense. Our policy is based on the following principles:

- **To minimise the impact and maximise the benefits that our work has on the environment and people around us.**
- **To integrate ESG considerations across all our business decisions.**
- **To comply with, and exceed where practicable, all applicable legislation, regulations, and codes of practice.**
- **To review, annually report, and to continually strive to improve our ESG performance.**

STRATEGY

People

- We are committed to eliminating discrimination and encouraging equality and diversity amongst our workforce. Our aim is to ensure that our workforce is truly representative of all sections of society and that each employee feels respected and able to contribute fully.
- We are committed to delivering a fair employment environment and the opportunity to advance and strive to ensure that everyone in the firm always has access to development opportunities.
- We are committed to providing our staff with skills and resources to improve their employability. This can be seen in the development plans of our trainee solicitors/solicitor apprentices and wider staff.
- We are committed to working with local institutions to support wider access to the legal profession.
- We are committed to offering our staff a positive and healthy working environment.
- We are committed to emphasising a supportive and welcoming working environment in our induction process for new staff members.

Community

- We are committed to being a responsible contributing member of society, building strong relationships with the local community, and supporting local and national charities.
- We are committed to work in co-operation with the voluntary sector and other bodies in the local area to see where investment (in financial or other terms) can best be made across all offices.
- We are committed to support a broad range of activities locally and nationally, including donations of money, skills and time.

Environment

- We are committed to taking our responsibilities towards the environment seriously, and to encourage all staff members to adopt ethical principles.
- We are committed to taking continuous steps to minimise our impact on the environment through reduction of waste and energy consumption.
- We are committed to making positive steps to reduce the amount of paper we use as a firm.



PEOPLE



Commitment

Eliminate discrimination and encourage equality and diversity amongst our workforce.

Actions and targets

- At least 50% of staff to complete the SRA diversity questionnaire.
- Bi-annually submit data to the SRA to assist in monitoring diversity of legal profession.
- Bi-annually publish anonymised data on our website to provide transparency on diversity within the firm.
- Annually review and publish our Equality and Diversity Policy on our website.

Commitment

Encourage and help all employees to develop their full potential.

Actions and targets

- Trainee Solicitor Development Programme to ensure experience gained in all areas of law covered by the firm.
- At least 35% of staff to take part in additional skill and personal development training (not including mandatory training).

Commitment

Make the legal profession more accessible to all, regardless of background.

Actions and targets

- Annual participation in The Rodillian Academy Career Ready Programme.
- Give access to at least four mentoring and work experience placements each year.
- Take on at least two solicitor apprentices per year.

Commitment

Recognise the importance of staff and offer a positive and healthy working environment.

Actions and targets

- Internally recruit one additional mental health first aider (to support the Office Manager who is already qualified).
- Operate wellbeing initiatives including: a weekly fruit delivery; twice-yearly massage sessions; access to the Employee Assistance Programme.

COMMUNITY



Commitment

Support a broad range of activities, charities and organisations locally and nationally as individuals and as a firm.

Actions and targets

- Monthly fundraising events (e.g., dress down days) to raise funds for local charities.
- An annual charitable fund assigned in the marketing budget of up to £4,000 to use for community sponsorships, events, and donations.
- Support of up to four local charities each year to include donations, events, and promoting campaigns.
- Annual membership of Solicitors for the Elderly for our wills and estates team, which helps vulnerable people with help and advice.
- Advice from our employment team for individuals who have suffered discrimination, including physical and mental disabilities.
- Personal injury and clinical negligence teams assist individuals with significant, severe injuries, including those with disabilities.
- Providing annual advice and support to national charities such as Headway (the organisation representing victims with all aspects of head injury) and Age UK.
- Staff to support the work of local parties and councils, and serve as Board members for charitable trusts, arts and cultural organisations.
- Staff members use their professional skills to support local social enterprises on a voluntary basis.



ENVIRONMENT

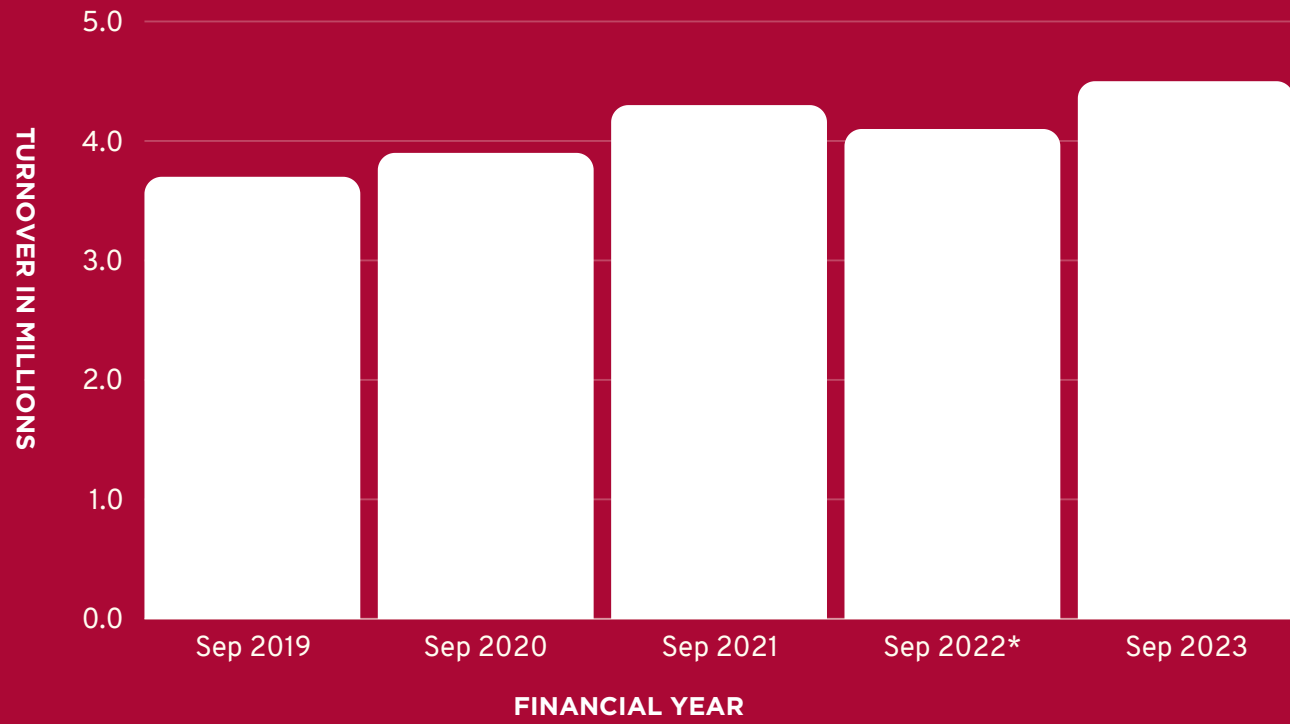
Commitment

Introduce and maintain significant environmental practices.

Actions and targets

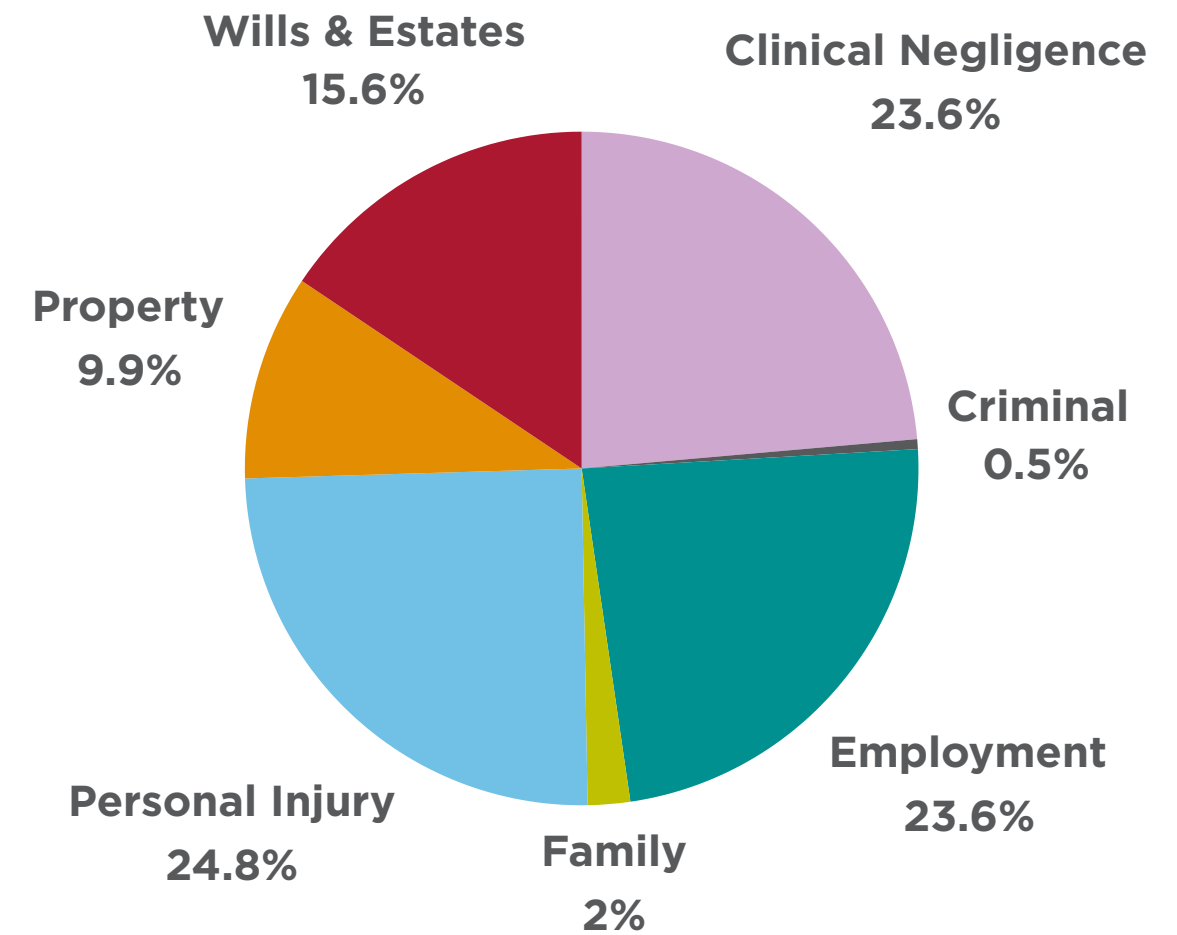
- 100% of shredded paper to be recycled.
- 80% of office waste to be recycled.
- 100% of paper stationery supplies to be recycled.
- 80% of marketing merchandise to be made from recycled materials or able to be recycled.
- 70% of office electrical and printer waste to be recycled or donated.
- Reduce environmental impact of staff commuter journeys by 45% via hybrid working.
- Use of hybrid/electric vehicles as a firm and reduce mileage by 20%.
- Encourage car sharing when attending meetings.
- 70% (where possible) of correspondence to be sent via email.
- File documents electronically where possible to reduce the amount of paper files.
- 70% (where appropriate) of clients to sign documentation electronically (e.g., via DocuSign).
- For cases with multiple claimants, use electronic surveys to gather information and store this information electronically.
- HubSpot CRM will allow for regular electronic client communications and updates.
- Ensure PCs/laptops are switched off on a night and no devices including screens, monitors etc., are left on standby except where necessary for business continuity.
- Migration to Microsoft Azure cloud and complete removal of on-site servers by 2024 will reduce electricity consumption by devices and cooling systems in server room.
- 90% of products and marketing merchandise to be sourced from local and UK-based, employee-friendly, sustainable suppliers which supports the UK economy and job creation, reduces carbon from shipping costs, and provides employee wellbeing.

MORRISH SOLICITORS LLP



ANNUAL REVIEW 2023-24

% REVENUE BY TEAM 2022-23



TURNOVER YEAR-ON-YEAR

- Graph shows data in £millions.
- Financial year runs from 1 October - 30 September:
 - 2019 £3.7m
 - 2020 £3.9m
 - 2021 £4.3m
 - 2022 £4.1m
 - 2023 £4.5m
- *Year ending September 2022 was affected by a temporary reduction in billing when new practice management system P4W was introduced.

EMPLOYMENT

“Daniel was professional, efficient and handled my case expertly. He was fantastic and I would absolutely recommend Morrish and their services.”

41.6%

Increase in new cases in 2022-23.

“It has been quite a difficult time for me and my family, and your assistance and understanding has been invaluable.”

810

Trade union and association cases in 2022-23.

“It’s been a very long journey but in the end I got my life back, my freedom and my ability to do what I’ve always loved and done best.”

3

New fee earners in the employment team.

PERSONAL INJURY

“An excellent company to work with. John Morrison and Lucy Wilson are excellent solicitors whom I would thoroughly recommend.”

“I wanted to take the time to write and thank you for your time and support after my accident at work...Laura Nabozny, who handled my complaint was professional, supportive and efficient. ”

“You came to us highly recommended and you have more than lived up to that billing! We will be forever grateful for your wise counsel and for acting unfailingly in our best interests throughout.”

£6.7M

Damages won for stunt industry worker.

£1.1M

Compensation won for accident at work client.

£775K

Damages won for injured stage performer.

CLINICAL NEGLIGENCE

“Anna Sari, her professional competence in securing expert input, clear advices to me as a client, her caring approach through some difficult periods and determination to bring the good result. The process went exactly as she set out at the outset.”

“Excellent work, help and support given by everyone involved in our case.”

“From the beginning to the end you are supportive, honest and skillful. I am so happy with your service..”

£700K

Compensation won for failure to diagnose idiopathic intercranial hypertension.

£190K

Damages won for serious surgical error claim.

£35K

Compensation won for delayed cancer diagnosis.

FAMILY LAW

“I received an excellent service and received the outcome that I had hoped for from my case.”

“Great awareness for me. Perfect response. Good working partners within the company. I was made to feel valued..”

“Calm and down to earth approach, good advice, straightforward and easy to understand at all stages. All of the staff I dealt with were helpful and supportive.”

33%

Increase in new cases in 2022-23.

30%

Clients returning to use Morrish family law services.

88

New cases in 2022-23.

PROPERTY

“You were recommended to deal with a remortgage. I was kept really well informed with the progress on the case. Would recommend and use again without doubt.”

“Throughout the whole process all my queries were responded to promptly. Overall, I am delighted with the service and been well supported. I would be happy to recommend Mark Laird and team to anyone who is looking for a reliable solicitor to purchase a property. Thank you for all your hard work for making this happen for me.”

10%

Increase in fees in 2022-23 despite 12% fall in property transactions nationally.

59%

Clients returning to use Morrish residential property services.

573

New cases in 2022-23

WILLS & ESTATES

“Very professional from start to finish, with help and advice for preparing my will. Thanks to the team. Would highly recommend Morrish Solicitors.”

“Prompt response to queries, getting good information without having to wait. A very efficient service.”

“Very helpful when explaining what was happening and what needed to be done.”

25.7%

Increase in new cases in 2022-23.

41%

Clients returning to use Morrish wills and estates services.

919

New cases in 2022-23.