

IP Inclusive: LEO's report 3Q 2020



IP INCLUSIVE

Working for diversity and inclusion in IP

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1 General

This last quarter year has been busier than ever. Our ability to organise wide-reaching virtual events has allowed us to embark on two major, cross-sector projects: senior-level round table meetings about both BAME representation levels and social mobility. As our standing in the sector grows, we are becoming a serious forum through which the IP professions can work together for D&I-related

change. This puts us in a good position, I believe, for consulting with our stakeholders about the value of IP Inclusive, how it should develop and who will support it going forward (see 6 below).

The two round tables brought more work than in previous summers. In July and September I was working far more than the originally-envisaged two days a week on IP Inclusive business. This will need to be addressed in 2021 as we plan IP Inclusive's development, particularly if we are to build on the momentum generated by those summer projects.

2 Progress on 2020 priorities

2.1 Extending our reach

Persuade more people of the importance of diversity and inclusion (D&I) to the IP professions

- Communities and regional networks collaborating on projects to encourage and support diversity “allies”:
 - July to September: mini-series of interviews recorded on the topic of “Allies & Intersectionality”, with diversity champions whose experiences span more than one of the “minority” categories; four recordings posted on our YouTube account during 3Q 2020.
 - July: blog post published about how to support BAME colleagues.
 - July: sector-wide round table on improving BAME representation levels and supporting BAME professionals (see 2.3 below).
 - August: “Ask Me Anything” survey launched by the North of England network to gather questions for an October event on allyship, which will involve panellists from all five communities.
 - Women in IP planning an event for early 2021, in partnership with the other communities, to establish “quick wins” for organisations to support people in under-represented groups (see 2.5 below).
- July: leaders of private sector patent and trade mark firms invited to join a “think tank” to pioneer new, senior-level D&I initiatives and champion change from the top. Encouraging responses; registrations now being gathered for a first virtual round table in November 2020. This is a joint project with CIPA and CITMA, being led by CIPA's Honorary Secretary Gwilym Roberts and me.
 - Aiming for practical outcomes and commitments, which we will vigorously publicise in order to maintain momentum, guarantee follow-up and raise awareness of the importance of D&I at all levels of the profession.
- The round tables on BAME representation levels and social mobility brought together invited guests from many IP sector membership organisations, including those for IP solicitors, barristers and licensing executives, helping to widen our reach and notoriety throughout the IP professions.

- Generally, lockdown has yielded more remote access events, which have helped us reach more people.

2.2 Disability confidence

Through IP Ability, encourage and support disability confidence in the IP professions

- July: article published in *World Trademark Review*, on the results of IP Ability’s 2019 launch survey and the need for better disability support in the IP professions.
- July and September: IP Ability committee members Jonathan Andrews and Chris Clarke interviewed for IP Inclusive’s “Allies & Intersectionality” mini-series (see 2.1 above).
- September: IP Ability committee members featured in an episode of CIPA’s “Two IPs in a Pod” podcast series, discussing the community’s background, activities and future plans.
- September: IP Ability webinar on invisible disabilities.
- September: session on disability awareness and the work of IP Ability, presented by a group of its committee members, at CIPA Congress.
- September: IP Ability committee published its compilation of useful links and resources to help IP professionals, employers and aspiring IP professionals become more disability-confident. It includes tools and resources relating to specific aspects of disability, neurodiversity, health and caring.
- September: launch of an IP Ability survey on the accessibility of the UK and European patent attorney exams, distributed through CIPA.
 - Aiming to gather evidence to support approaches to the relevant examining bodies over problems identified by the survey.
- Social media activity for World Alzheimer’s Day (21 September).

2.3 Ethnic diversity

Through IP & ME, understand more about, and begin to address, the current low levels of ethnic diversity in the IP professions

- July: Parminder Lally interviewed for IP Inclusive’s “Allies & Intersectionality” series (see 2.1 above), on being both BAME and female.
- July: virtual round table on BAME representation in the IP professions.
 - Involved IP & ME members and high-level invited representatives from a range of IP sector organisations.
 - Tim Moss (IPO Chief Executive) addressed the meeting and endorsed its objectives.
 - Discussion topics included: increasing BAME levels on recruitment into the sector; improving BAME visibility within the sector; supporting BAME professionals; tackling unconscious bias; improving our evidence base.
- August: initial round table commitments published.

- September: detailed round table outcomes published, in the form of suggested steps that IP sector organisations could take to improve BAME representation levels.
 - Published alongside endorsements from several organisations, including the IPO, and progress updates from those who had begun discussing and in cases implementing the suggested steps.
- In 4Q 2020, we need to maintain momentum by encouraging Charter signatories to act on the suggestions, coordinating sector-wide working groups where appropriate and continuing to publicise and celebrate progress updates from within the IP sector.
 - Careers in Ideas Week (see 2.4 below) will incorporate some of the suggestions into its outreach activities.
- September: initial talks with IP & ME committee members on establishing a BAME speaker directory (one of the measures endorsed by the round table); work will continue with a view to creating a prototype scheme by the end of 2020.
- July: “News and Features” website post on how to support BAME colleagues.
- September: article about BAME allyship, by IP & ME committee member Hannah Burrows, published in the *CITMA Review*.
- September: with IP & ME committee member Krishna Kakkaiyadi, I participated in a podcast for *Intellectual Property Magazine* on “Breaking down BAME barriers”.

2.4 Careers in Ideas (CinI)

Continue to raise awareness of, and improve access to, IP-related professions, focusing on currently under-represented groups; develop the existing Careers in Ideas resources

- CinI task force met in July and September; next catch-up scheduled for early November to finalise plans for Careers in Ideas Week.
- Careers in Ideas Week (16-22 November 2020) preparations going well; this looks set to be a valuable way of increasing awareness of the campaign and involving more people. Plans developed thus far include:
 - Call to action based on the outcomes of the September 2020 “think tank” with IP Federation: see below.
 - Webinars to help IP professionals with outreach (one on schools outreach for STEM-based careers; one on schools outreach with input from National Careers Week; one on university outreach with input from the IPO on their IP education and outreach tools).
 - Virtual careers clinic by IP Futures, for students selected by relevant charities.
 - Law Society IP Law Committee event on routes to becoming an IP solicitor.
 - Online “masterclass” offering guidance on the application and interview process, for students (again selected by relevant charities) who hope to enter the patent and trade mark professions.

- IPO recording about their “Cracking Ideas” schools outreach campaign, to raise awareness among IP professionals.
- Databases of schools and universities (NB only publicly-available information), to help IP professionals identify where to do outreach work and help us coordinate our efforts.
- Database of outreach and social mobility charities, again for use by IP professionals when planning CSR and outreach.
- Associated “featured charities” campaign, with website posts on the charities in the database.
- New resources for use in work experience events.
- Updated content on the CinI website, and hopefully a better-populated “opportunities board” in time for any additional traffic generated by CinI Week.
- Dedicated CinI Week page on the IP Inclusive website: see <https://ipinclusive.org.uk/careers-in-ideas-week/>.
- Comms being mirrored on the CinI website, although this is less easy to edit so we are considering some simple CMS upgrades in early 4Q 2020 (there is budget available for this from CinI-related donations earlier in 2020, along with surplus funds from the 2018-2019 IP Inclusive website upgrade).
- The comms working group continues to post regularly in the LinkedIn group, on Twitter and on the website news page and to monitor the new email account for website-generated enquiries.
- September: virtual “think tank” meeting organised in collaboration with IP Federation, on social mobility and access to the IP professions:
 - Involved high-level invited representatives from a range of IP sector organisations; IP Federation; the CinI task force; and several relevant charities.
 - Tim Moss (IPO Chief Executive) and Scott Roberts (IP Federation President) addressed the meeting and endorsed its objectives; Suzanne Oliver (IP Federation Immediate Past President) chaired; I organised the preparations, comms and technical support.
 - Discussion topics included: outreach; access; career development; unconscious and conscious bias; particular issues for the STEM-related IP professions; patent attorney qualification requirements; our evidence base; and national policy.
 - Outcomes, in the form of suggested steps that IP sector organisations could take to improve social mobility and access, will be published in October; they will include ideas for supporting Careers in Ideas Week.
 - Led to much stronger links with the outreach charities, who will be key to effective progress. (A new collaboration with [National Careers Week](#) is expected to be particularly helpful for spreading the word about IP careers among school teachers, pupils, careers advisers and parents.)
 - We hope that as a result, IP sector organisations will offer work experience opportunities and other outreach events, and/or volunteer speakers, mentors etc,

working with the charities to ensure our messages reach a new and more diverse audience.

2.5 The EDI Charter

Encourage and support greater involvement from Charter signatories, and fulfilment of the Charter commitments

- September: event on D&I data gathering (see 7 below).
- September: North of England network's "Ask Me Anything" survey and event plans (see 2.1 above).
- September: Midlands network event on "Culture and belief".
- Plenty of regional involvement in the Women in IP coffee dates, each of which comprises a series of separate virtual meetings hosted around the country ("venues" this quarter included Bath, Belfast, Birmingham, Glasgow, London, Southampton and York, also Dublin ("in association with" IP Inclusive)).
- September: "To Diversity and Beyond" (TDAB) survey sent to Charter signatories (see 6 below).
- Considering a further survey in early 2021, asking signatories to re-confirm their commitment to the Charter pledges; tell us the resources they would like from IP Inclusive in the future; and share updates and ideas from their own experiences with D&I issues.
- Suggest we make it a priority next year to engage more with the Charter signatories (ie the organisations, not just the individuals within them who are already supportive): this will be especially important if/when we move to a more formal structure and require greater financial support from our stakeholders.
- Women in IP annual event, being planned for early 2021, will focus on "quick wins" for Charter signatories to support people from each of the five communities; the outcomes will be published as a Charter signatory toolkit.
- Acquired 2 new Charter signatories during 3Q 2020. Hoping to encourage more in-house departments to sign up, following the collaboration with them on social mobility projects (see 2.4 above).
- Some take-up of the "Steps to Inclusion" D&I review, created by IP Inclusive partners Focal Point Training and tailored for our Charter signatories.
- Added 9 new "resources" to our website Resources page in 3Q 2020, including event, podcast and "Allies & Intersectionality" interview recordings; the outcomes of the July BAME round table (see 2.3 above); IP Ability's "disability confidence" resources (see 2.2 above); and Jonathan's Voice mental wellbeing resources (see 4 below).
- Midlands network committee lead Jennifer Unsworth now on maternity leave but has appointed replacements.
- South West network quieter than the others recently due to its key committee members' professional and domestic workloads; if necessary I can step in here during 4Q 2020 to 1Q

2021 as we've potential mental health-related events that could be run from the South West.

- Scotland network committee lead Laurence Cheyney particularly active in organising regional coffee dates and encouraging activity in new regions.

3 The five communities

The communities continue to be a key source of momentum for IP Inclusive during lockdown, generating events and resources for themselves. All were involved in our two sector-wide events (the BAME round table in July and the social mobility event in September). This quarter has also seen increasing collaboration between the different communities, with preparations for the October joint allies event (see 2.1 above) and Women in IP/IP & ME coffee date.

- **IP & ME**
 - See 2.3 above.
- **IP Ability**
 - See 2.2 above.
- **IP Futures**
 - August: virtual “drinks evening”, with informal discussions – in smaller breakout groups – on post-Covid expectations.
 - As the October patent exams approached, activity inevitably declined, although the committee continued to meet and preparations were begun for an online careers clinic for Careers in Ideas Week (see 2.4 above).
- **IP Out**
 - July: webinar on “An introduction to non-binary identities”.
- **Women in IP**
 - Virtual coffee dates in July (lunch-time) and August (morning)
 - Regional hubs used to create a series of smaller meetings each time (see 2.5 above).
 - Discussion themes were “putting yourself forward” and “banter”; collated discussion points were reported on the website News & Features page.
 - July: webinar on “Learning through lockdown”.
 - September: Women in IP committee leads Joanna Conway and Susi Fish took part in an episode of CIPA’s “Two IPs in a Pod”, discussing the community’s current and future work.
 - The committee continues to meet monthly to ensure a focused pipeline of events and activities.
 - Next annual event being planned for early in 2021 (see 2.5 above).

4 Mental health and wellbeing

- Continued to work with LawCare and Jonathan’s Voice on mental health-related issues, including through my role as a LawCare “Champion”.
 - Provided input into Jonathan’s Voice guidance booklet for leaders and managers in the patent and trade mark professions.
- September: chaired a session with LawCare Chief Executive Elizabeth Rimmer at the CIPA Congress, on “Mental health and wellbeing: what everyone needs to know”.
- September: recorded an interview with Jonathan’s Voice about mental wellbeing at work and their new guide for patent and trade mark professionals; the recording can be accessed via the IP Inclusive and Jonathan’s Voice websites and used as a resource by other IP sector organisations.
- The mental health first aider support network continues to thrive:
 - Occasional exchanges on WhatsApp and LinkedIn to share ideas and provide support for one another.
 - Network growing gradually though still manageable in size.
 - A rota ensures that at least something gets posted on LinkedIn every few days and keeps everyone involved.
 - Hoping to organise some “lunch-&-learn”-style events in the coming months, on topics of interest and/or with inspiring speakers.
- Instead of a Mental Health Awareness Week survey this year, we will be promoting LawCare’s survey on mental wellbeing in the wider legal sector.
 - This will launch in October and we have been promised access to IP sector-specific results.
 - Depending on the value of those results, we may still want to re-run our 2018 and 2019 surveys of patent and trade mark professionals in 2021, in particular to gauge the impact of Covid-19 by comparison with our earlier data.
- Mental health may become more important as Covid-19 restrictions tighten again and a potentially difficult winter sets in: see 5 below.

5 Covid-19 response

Operating remotely, under whatever form of lockdown is currently in force, has become standard for all of us in the IP professions. IP Inclusive adapted well to the new ways of working, and continues to appreciate the organisational, access and inclusivity benefits: the cross-sector BAME and social mobility meetings, for example, would have been far more difficult, and potentially less effective, in the pre-Covid world.

During 3Q 2020 many of our supporters were enjoying a break from the spring restrictions and trying to reinstate some semblance of normality, some even returning to the office and many taking the opportunity to holiday. IP Inclusive did not therefore focus on issues to do with Covid-19, freeing us up to concentrate on bigger issues such as the BAME and social mobility projects.

We expect mental wellbeing to regain importance due to the longer-term implications of living with Covid-19, in particular the continuing limits on social interactions. Loneliness, combined in some cases with grief, anger, and of course more practical problems around job security and personal finances, could become serious issues. The wider availability of events and communications may also mean that people are over-committing their time and failing to step away from the workstation (which is now also their home) as much as they should.

We will listen to what supporters are saying, including at our events, and attempt to provide appropriate support, working of course with the mental health charities.

We will continue to offer online events, which have been well attended even during the period when some people were returning to their employers' workspaces. The round-table format with breakout rooms for smaller group discussions has worked particularly well: meetings like this require a fair amount of background preparation, but have generated extremely constructive outcomes.

Where appropriate, we will weave the impact of Covid-19 into the themes of other events. It was, for example, relevant to our September discussions on social mobility and several of this quarter's community events (see 3 above).

It will remain important for IP Inclusive to provide a safe space in which IP professionals – particularly those who are vulnerable in some way – can access peer support and reassurance. This we expect to happen primarily through our five communities and the regional networks.

6 Strategic development

- “To Diversity and Beyond” (TDAB) survey launched in September to Charter signatories: see 2.5 above. The survey seeks views on a proposed new Community Interest Company (CIC) structure and signatories' willingness to contribute to its funding.
- An alternative (anonymous) version of the survey for individual IP professionals is also now live and will be promoted over the coming weeks through mailshots and social media activity.
- Intended plan from here: see annexed “road map”.

7 D&I data gathering

- September: panel discussion and workshop on D&I data gathering.
 - Received good feedback despite technical hitches at the start.
 - Panel discussion recording and discussion outcomes published afterwards.
 - Outcomes included (a) IP Inclusive should continue to gather sector-wide data, and also information about best practices; (b) we should encourage and support (but not require) Charter signatories to gather D&I data.

- Began work updating the 2019 benchmarking survey ready to repeat in November 2020, taking account of feedback from the earlier survey and the September 2020 event.
 - Information about best practices may be best collected separately through a Charter signatory survey (see 2.5 above).

8 Operational

8.1 Websites

- 16 News & Features posts published on the IP Inclusive website during 3Q 2020, including IP Inclusive news, event reports, guest blogs and comment.
- 2 News posts on the Careers in Ideas website during the same period.

8.2 Other

- Avoided upgrading the Mailchimp account to a paid version for another quarter, by “archiving” some of our older contact lists, but upgrade may be needed in 4Q 2020. IPReg’s 2020 funding covers this.
- I attended an IPIM meeting on 8 September 2020.
- YouTube account, created in mid-June, being well used: 9 recordings posted during 3Q 2020, including webinars, panel discussions and interviews.
 - Free service includes automatically-generated subtitles to improve accessibility.
 - We post our videos as “unlisted”, so only people who know the link can find them; this reduces spam and trolling problems.
 - Event recordings are easy to generate from Zoom meetings and upload.
 - Delegates are informed well in advance if we intend to record meetings; breakout discussions and round tables are generally not recorded, to allow for greater openness.

9 Miscellaneous

- Interest and enquiries from IP professionals overseas:
 - August: I took part in an online Q&A event about D&I with YIPTA (the junior section of the Australian patent attorneys’ membership body).
 - The Women in IP coffee dates continue to include “associated” events in Ireland.
 - I responded to enquiries from the IPO (Intellectual Property Owners Association) in the US regarding our D&I data gathering work and our experience of other D&I data sources in Europe.

ARB
24.10.20

Annex: “Road map” for IP Inclusive development in 2021

4Q 2020	Review TDAB survey responses
	Assuming basic support, update the high-level CIC plans in light of responses
1Q 2021	At annual meeting (19 January 2021): report survey responses and updated CIC plans; discuss with attendees
	Revise plans in light of annual meeting discussions if necessary
	Publish revised plans; further stakeholder consultation period
2Q 2021	Assuming support for revised plans, prepare for transition to CIC: obtain requisite legal and financial advice; draft company documents; recruit steering board members and executive staff; secure company registration; secure initial seed funding and put future funding mechanisms in place
3Q 2021	CIC begins “trading”

Note that:

- All actions are for the Lead Executive Officer (LEO) with IPIM support.
- If the LEO workload continues at current levels and no additional help can be found, timings are likely to slip by a quarter.
 - Restructuring must not undermine the initiative’s core activities.
- If there is insufficient stakeholder support for the CIC model, we need to decide an alternative plan to put to stakeholders during 1Q 2021; discussions at the January 2021 annual meeting would help inform that plan.