

IP Inclusive: LEO's report 3Q 2022



IP INCLUSIVE

Working for diversity and inclusion in IP

Contents

1	General.....	2
2	Careers in Ideas (CinI)	2
3	The EDI Charter	2
4	The six communities	3
4.1	IP & ME.....	3
4.2	IP Ability	3
4.3	IP Futures	4
4.4	IP Non-traditional Family Network	4
4.5	IP Out	4
4.6	Women in IP.....	4
5	Resources.....	5
5.1	<i>Inclusivity Unlocked!</i>	5
5.2	Other	5
6	Mental health and wellbeing.....	6
7	Extending our reach.....	6
8	Operational	7
8.1	IPIM	7
8.2	Advisory Board	7
8.3	Executive staff.....	7
8.4	Websites.....	9
8.5	Financial	9
9	Miscellaneous	9
9.1	Lobbying and influence.....	9
9.2	Other	9

1 General

The third quarter of the year is often a quieter time for IP Inclusive because of the summer holidays. We have however used the period productively, expanding our executive team and creating a new programme of events and resources, *Inclusivity Unlocked!*, focused on rebuilding working arrangements post-Covid (see 5.1 below). Other initiatives we have begun planning include a 2023 Careers in Ideas *Summer of IP* (2 below) and an informal online discussion forum for our Senior Leaders' Pledge signatories (7 below).

We have also published our business plan and budget for 2022-23 and launched our second fundraising campaign to cover it. The projects identified above align with the priorities it identified.

2 Careers in Ideas (CinI)

- Our intern Susan Nelson has spent a significant proportion of her time on CinI, including:
 - Maintaining the new Instagram account and creating content to introduce different types of IP right
 - Handling email queries generated through the CinI website
 - Writing news posts for the website
 - Planning, and coordinating initial work on, a “Summer of IP” campaign for 2023
- *Summer of IP* will be a programme of awareness-raising events and work experience/open day opportunities, some provided by CinI and some by individual IP sector employers whose contributions will be promoted centrally through CinI
 - Initial planning meetings have been held and a prospectus drafted
 - A working group within the CinI task force will be established to run the project from here on
- August: guest post on the IP Inclusive website News and Features page from the outreach and social mobility charity In2scienceUK, which continues to foster strong links with the IP professions based on its relationship with CinI
- September: news posts about *Summer of IP* published on both the CinI and IP Inclusive websites
- Mentoring Hub: 35 mentors and 52 mentees at the end of 3Q 2022

3 The EDI Charter

- September: Midlands Network joint social event with IP Out (drinks in central Birmingham the day before Birmingham Pride)
- Signatory changes during 3Q 2022:
 - Acquired 2 new signatories (a small private sector patent and trade mark firm and the mental wellbeing charity Jonathan's Voice)
 - 3 signatories removed due to their closure or acquisition

- 3 new sign-ups received on the last day of September (one of them the acquirer of a previously removed signatory); these will be processed early in October, leading to a total of 155 signatories

15 signatories have already contributed to our 2022-23 fundraising campaign. Many of them have representatives on the senior leaders' diversity think tank and/or who have signed our Senior Leaders' Pledge (see 7 below); this helps us to build more effective relationships with our community of signatories. We hope to reach out to other sections of that community, which are not currently so well engaged (for example law firms, barristers' chambers and in-house departments), through more targeted meetings over the next six months.

The *Inclusivity Unlocked!* campaign (see 5.1 below) is designed to help our Charter signatories with EDI as they emerge from the pandemic and should help us increase the value of their involvement in IP Inclusive.

4 The six communities

4.1 IP & ME

- July & August: 2 website News and Features posts to mark South Asian Heritage Month
- September: committee co-lead Josh McLennon represented IP & ME in part i of our *Inclusivity Unlocked!* event "Leaving no one behind" (see 5.1 below)
- September: organised a dinner get-together for IP & ME supporters in the Manchester region, to take place in the first week of October
- Committee members are also liaising with their counterparts at the IPO over activities to mark Black History Month in October
- The IP Inclusive AskME directory: new website pages and functionality signed off but lack of volunteer time has sadly delayed the testing phase and therefore the launch

4.2 IP Ability

- July: coordinated a response to the EPO's consultation on proposed new EQE arrangements, prepared with input from the IP Non-traditional Family Network and Women in IP, discussing in particular the needs of disabled candidates, parents and carers and the availability of reasonable adjustments
- July: webinar for Disability Pride Month, in which panellists discussed their experiences as disabled professionals in the legal sector
- July: sourced a guest post for the website News and Features page on general workplace inclusivity for disabled people
- September: committee member Megan Rannard represented IP Ability in part ii of "Leaving no one behind"

4.3 IP Futures

- September: committee member Sanam Habib represented IP Futures in part ii “Leaving no one behind”

4.4 IP Non-traditional Family Network

- July: provided input into IP Inclusive’s response to the EPO EQE consultation, led by IP Ability: see 4.2 above
- September: committee co-lead Janine Swarbrick represented the IP Non-traditional Family Network in part i of “Leaving no one behind”

4.5 IP Out

- July: committee member Darren Smyth addressed a group of German IP professionals who are establishing their own IP-focused LGBT+ support network and wanted to hear about the IP Out/IP Inclusive model
 - His talk was reproduced in a website News and Features post later in July
- July: charity quiz night with Crystal from *RuPaul’s Drag Race UK* – a sell-out in-person London event which raised over £1,000 for the chosen charity *The Outside Project*
- August: committee co-leads Isobel Barry and Tom Leonard were interviewed about IP Out in an article to celebrate Pride season published by the *Intellectual Property Institute of Canada*
- September: committee member Kevin Rich represented IP Out in part i of “Leaving no one behind”
- September: joint social event in Birmingham, with the Midlands Network, to mark Birmingham Pride (see 3 above)

4.6 Women in IP

- July: provided input into IP Inclusive’s response to the EPO EQE consultation, led by IP Ability: see 4.2 above
- July & August: 3 website News and Features posts, including reports of the February 2022 “Invisible labour” coffee date and the June 2022 annual event, the experiences of a breastfeeding female patent attorney at the EPO, and menopause inclusivity
- September: online “coffee date” with discussions hosted by several individual volunteers, discussing gender balance in performance reviews
- September: committee member Lucy Samuels represented Women in IP in part ii of “Leaving no one behind”
- Follow-up to the June annual event now organised for early October
 - The same panellists will return to explore the “authority gap” theme in more detail
 - Being run as a hybrid event, hosted by Gowling WLG in-person in London and online, to make up for cancellation of the in-person part of the June event due to rail strikes

5 Resources

5.1 *Inclusivity Unlocked!*

One of the high-level objectives in our 2022-23 business plan is to develop the support and resources we provide. Within this, at the request of our Advisory Board and 2022 annual meeting delegates, we pledged to provide specific support on the inclusivity of workplaces and working arrangements post-lockdown: this gave rise to *Inclusivity Unlocked!*, which we launched in September.

Inclusivity Unlocked! is a programme of events and associated resources to support organisations as they emerge from the Covid-19 lockdowns. The project is being led by our intern Susan Nelson. Events covering a range of themes, largely if not entirely online, will be used to generate practical tips for an ongoing compilation. We expect the programme to last about six months.

The first event was a two-part September webinar, “Leaving no one behind”, in which representatives from our six communities discussed how to shape new working arrangements to support specific groups of people.

Events set up so far for 4Q 2022 are:

- October: “What’s for starters?” – a webinar with Jonathan’s Voice about supporting the mental wellbeing of new starters, trainees and other early-career IP professionals
- November: “Harnessing hybrid” – a webinar with Smart Working Revolution about building efficient and inclusive hybrid working models
- November: “Teamwork, Trust and the post-Covid Tide” – a webinar with Focal Point Training about developing good working relationships and managing expectations within teams, especially in hybrid working environments

Also in the planning are events focused on business development in the post-Covid world; menopause support; inclusive workspace design; and more (hopefully with Jonathan’s Voice and LawCare) about the mental health impact of new working arrangements.

The full programme is available online and updated on a rolling basis. We also have a survey open for supporters to suggest additional event topics and formats.

5.2 Other

Other resource topics mentioned in the business plan will be woven into *Inclusivity Unlocked!* events where feasible. For example, the “Leaving no one behind” webinars also covered allyship, whilst mental wellbeing will be referenced in all events relating to workplace behaviour and working arrangements, as well as in the specific events referred to in 5.1 above.

During 3Q 2022 we published 4 website News and Features posts featuring guidance, practical tips and supporting resources from IP Inclusive events, for example from Women in IP discussions on the “authority gap” and from webinars with Jonathan’s Voice on mental wellbeing. Other posts during

this time signposted sources of help about accessibility, reasonable adjustments and menopause inclusivity; shared ideas on organisational mental health policies; flagged the results of an external survey on banter in the workplace; and provided reading suggestions to mark South Asian Heritage Month. Having an intern to help produce these posts has made it easier for us to publish prompt and targeted resources.

6 Mental health and wellbeing

- July: Mental Health Awareness Week survey re-opened for a few weeks to allow for greater participation from CITMA members (the earlier one clashed with their membership survey)
 - A report of the survey results is being prepared by our Executive Support Helen Smith; we hope to publish at the start of 4Q 2022
- September: webinar with Jonathan’s Voice to mark World Suicide Prevention Day
- Several other events organised for 4Q 2022, including:
 - An *Inclusivity Unlocked!* webinar with Jonathan’s Voice on mental wellbeing for early-career IP professionals (see 5.1 above)
 - An online mental health first aid refresher course from Illuminate VR, provided at a discounted fee for IP Inclusive supporters
 - A webinar with Jonathan’s Voice, about male suicide, to mark International Men’s Day UK
- 5 of our website News and Features posts during 3Q 2022 related to mental health: the IPO’s approach to mental health first aid (an article shared from the *CIPA Journal*), an external survey on the mental health impact of workplace banter, the Jonathan’s Voice response to the EPO’s EQE consultation, and reports of our “The sticking plaster and the stairwell” and “Darkness to hope” webinars with Jonathan’s Voice

7 Extending our reach

- Senior leaders’ diversity think tank:
 - “Pledge Prattle” forum (for informal online discussions between Senior Leaders’ Pledge signatories and their senior HR and management colleagues) established, with the first drop-in meeting scheduled for mid-October
- Business support professionals:
 - Involved in the Pledge Prattle discussions (as invited guests of Pledge signatories)
 - Attending *Inclusivity Unlocked!* events, and in some cases contributing as speakers and/or organisers (including through the IP Practice Directors’ Group)
- IP paralegals:
 - In September I addressed a CITMA paralegals’ conference, on the importance of EDI, IP Inclusive’s work and how to get involved

- Two members of our Advisory Board will speak on similar issues at CIPA’s paralegals’ conference dinner in October
- July: met with someone running an EDI-improving scheme at Oxford Innovation, who has contacts in tech transfer; this could lead to a future event on improving EDI among innovators and other IP owners, and how IP professionals can help
- September: I wrote an article for the *CITMA Review* about involving all team members, not just attorneys, in IP Inclusive and in EDI more generally
- Intending to work with Jonathan’s Voice on an event in early 2023 about mental wellbeing for paralegals and business support professionals

8 Operational

8.1 IPIM

- July: updated Register of Interests published¹
- August: business plan and budget for August 2022 to July 2023 published²
- Meeting held on 20 September 2022
- IPIM liability insurance – insurers informed about our new employees (see 8.3.2 below); no change to premium or terms at this stage

8.2 Advisory Board

- July: members provided input into the draft 2022-23 business plan before its publication in August
- Meeting held on 20 September 2022
 - Discussed (a) what the *Inclusivity Unlocked!* programme (see 5.1 above) could include to improve our engagement with and support for Charter signatories, and/or to widen participation in IP Inclusive; and (b) how best to capture and utilise Board members’ diverse expertise and interests
 - Joined by IPIM in the last 30 minutes to report back key outcomes and also to discuss the ongoing relationship between IPIM and the Advisory Board after this first pilot year; more detailed advice will be provided with the meeting minutes
- Dola Kayode-Temenu resigned from the Board in July; the remaining members will discuss in a future meeting the membership term, succession planning and recruitment mechanisms

8.3 Executive staff

8.3.1 Lead Executive Officer (LEO)

- Work done during 3Q 2022 included in particular:
 - Completing and publishing the 2022-23 business plan and budget
 - Launching and administering the 2022-23 fundraising campaign

¹ See <https://ipinclusive.org.uk/ip-inclusive-management/> and <https://ipinclusive.org.uk/the-ip-inclusive-management-team/>

² See <https://ipinclusive.org.uk/newsandfeatures/the-journey-continues-our-2022-23-business-plan/>

- Selecting, appointing and onboarding new employees (see 8.3.2 below)
- Associated administrative and formal issues, including establishing contracts of employment and payroll systems
- Supervising our intern Susan Nelson and working with her in particular on the *Inclusivity Unlocked!* project (see 5.1 above) and *Careers in Ideas Summer of IP* campaign (see 2 above)
- September: additional payments made to cover the recruitment, appointment and onboarding of new support staff during August and September, as provided for in the 2022-23 business plan and budget

8.3.2 Administrative support

The new post of Administrative Support was advertised from mid-July with a closing date of 31 August, the vacancy appearing on the IP Inclusive website, in our update newsletters and on the Fellows and Associates jobs page (thanks to Advisory Board member Pete Fellows). This yielded a small but strong field of candidates, from which we appointed two:

- Helen Smith takes the role of Executive Support and will provide cover similar to that of our current intern Susan Nelson, who will be leaving at the end of October: coordinating *Inclusivity Unlocked!* and *Summer of IP* and helping with the creation of reports, online content and update newsletters
 - She started with us on 5 September 2022 and will work 8 hours a week, normally on Tuesdays and Wednesdays from 11 am to 3 pm
- Anne Burgato takes the role of Administrative Support which, as originally envisaged, will include helping with book-keeping, Charter signatory comms, event management and general administrative support for the LEO
 - She started with us on 6 September 2022 and will also work 8 hours a week, normally on Mondays and Wednesdays from 9.30 am to 1.30 pm
- Both work virtually, from their own homes, with a degree of flexibility in their weekly hours by agreement with the LEO

8.3.3 Intern

- Our intern Susan Nelson has continued to work with us for two days a week, in particular on:
 - The *Careers in Ideas* projects outlined at 2 above
 - The *Inclusivity Unlocked!* programme (5.1 above); this included both managing and chairing the first two events with our communities' representatives
 - The selection, interviewing and onboarding of new employees
 - Website News and Features posts on a range of topics, including event reports and articles to mark EDI awareness dates
 - The IP Inclusive Twitter account
 - Update newsletters
- As planned, she will finish at the end of October, her final working day being Tuesday 25 October

8.4 Websites

- 24 “News and Features” posts published on the IP Inclusive website during 3Q 2022, including IP Inclusive news, event reports, guest blogs and comment
- One news post on the Careers in Ideas website during the same period, about the planned 2023 *Summer of IP* campaign (see 2 above)
- Added 6 items to our website Resources page in 3Q 2022, including webinar follow-up materials such as presentations, recordings and reports, and also a general programme of events in the *Inclusivity Unlocked!* series (see 5.1 above)

8.5 Financial

- Bank account balance at 30 September 2022 = £59,894.45
 - £10,000 of this is a ring-fenced contingency fund
- Fundraising campaign, to cover the 2022-23 business plan, launched in August
 - £35,250.00 of the £80,000 target raised by the end of 3Q 2022
- Key expenditure during 3Q 2022 included:
 - Creation of extra functionality for the AskME directory development (£408.00)
 - Accountants’ fees for set-up of our Xero online bookkeeping account, including initial training and first subscription payment (£480.00)
 - Payroll (salaries and PAYE tax): total amount during 3Q 2022 = £1,779.74
- Outsourced payroll set up with our accountants Haines Watts for new employees Anne Burgato and Helen Smith (see 8.3.2 above)

9 Miscellaneous

9.1 Lobbying and influence

- July: led by IP Ability, responded to the EPO’s consultation on proposed new EQE arrangements (see 4.2 above)
- August: responded to IPReg’s July 2022 consultation on its 2023/24 business plan, budget and practising fees
 - Strongly supported its proposal to continue, and extend the scope of, a discretionary fee waiver in ways we recommended in our response to the corresponding 2021 consultation

9.2 Other

- July: attended, by invitation, two IPReg stakeholder meetings:
 - To discuss the outcomes of its regulatory review consultation and proposed follow-up
 - To discuss collaborative approaches to EDI data gathering in the patent and trade mark professions, between IPReg, CIPA, CITMA, the IP Federation and IP Inclusive

- June/July: I contributed an article to a special EDI edition of the *CIPA Journal*, regarding IP Inclusive's relationship with CIPA, its development over the years and its value to both organisations

ARB

6 October 2022