

IP Inclusive: LEO's report 2Q 2023



IP INCLUSIVE

Working for diversity and inclusion in IP

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1 General

Early in this quarter we held our 2023 annual meeting. It was a chance to celebrate our recent achievements, and also yielded valuable input from our supporters about the things we should be prioritising in our next business plan. I have been working on that throughout the quarter, seeking input from the Advisory Board, my IPIM colleagues and other IP Inclusive stakeholders. It will be published, with an accompanying budget, in late July 2023.

Much of the quarter has been spent preparing to launch the Careers in Ideas *Summer of IP* campaign, with the help in June of our Clifford Chance-funded intern Ayaan Ali. The campaign officially launches on 3 July.

Sadly, during this quarter we have taken the difficult decision to wind down our IP Non-traditional Family Network, although its co-founders will remain involved with IP Inclusive. We have also temporarily suspended our Midlands Network due to its currently low support levels, but hope to revive it soon. Improving our engagement with, and support for, IP professionals outside London will be a key part of the new business plan.

2 Careers in Ideas (CinI)

2.1 *Summer of IP*

The work of the CinI task force has been focused on *Summer of IP*¹ this quarter. *Summer of IP* provides a programme of awareness-raising events and work experience/taster opportunities, some provided by CinI and some by individual IP sector employers whose contributions are being promoted centrally through CinI. It will run throughout July, August and the first half of September 2023.

The work has been led by our Executive Support Helen Smith and me, with help from members of the CinI task force. During June our intern Ayaan Ali (see 8.3.3 below) helped us promote *Summer of IP* to potential recruits and their advisers.

- By the end of 2Q 2023 we had advertised 16 opportunities with IP sector employers; we expect to be able to add at least 10 more during July
 - These include “taster” events, webinars and online discussions, work experience placements and a mock hearing
 - They embrace a range of IP sector roles including patent attorney, trade mark attorney, IP solicitor, IP barrister, IP Office employee and business support professional
 - Some are being provided in regional locations such as Birmingham, Cambridge, Liverpool and Manchester

¹ See <https://ipinclusive.org.uk/careers-in-ideas/summer-of-ip-2023/>

- Seven introductory events have been organised for July, all either webinars or hybrid events (the recordings of which will be available afterwards), along with five new pre-recorded videos with general information about IP and IP careers
 - Various IP sector organisations, including the UK IPO, have helped to create, organise and/or host these
 - Again they cover a range of roles and working environments (there are specific talks, for example, about careers as an IP paralegal and about working in-house) as well as how to access them

2.2 Mentoring Hub

- April: website “News and Features” post by Mentoring Hub leader Carol Nyahasha (first published in the *CITMA Review*) about the benefits of mentoring both for mentees looking to access IP careers and for the professionals who help them
- May: MentorLoop platform subscription renewed for a further 6 months
- Current numbers of Mentoring Hub participants: 46 mentors and 53 mentees at the end of 2Q 2023

3 The EDI Charter

3.1 General

- Signatory changes during 2Q 2023:
 - One new signatory: Croda International plc’s IP Department
 - One signatory (Freeths) stepped down, for the time being at least, due to a need to focus on its wider EDI efforts as compared to those of its (proportionately small) IP team
 - Leading to a total of 159 signatories
- During the quarter, one more signatory contributed to our 2022-23 fundraising campaign

3.2 The regional networks

Recent discussions with the regional network committees, and with our wider support base at the April annual meeting, have revealed a need to rethink how IP Inclusive supports people in the regions in the wake of the pandemic. This will feature in the 2023-25 business plan (see 8.4 below).

As suggested at the annual meeting, we hope to run a survey later this year to establish how many supporters we have in each region and the types of EDI events and resources they would find useful. Armed with that information, we can then organise tailored events for IP professionals outside London.

The Midlands Network co-leads, Jennifer Unsworth and Lynne Jackson, stepped down from their roles towards the end of 1Q 2023. So far we have been unable to find replacements and so have taken the decision to “park” the network temporarily. I have however been contacted recently by someone interested in helping rekindle it.

3.3 Outreach meetings

We continued to hold small informal outreach meetings for law firm signatories in late April and throughout June. Another is planned for July. These have been very positive initiatives, revealing wide support for IP Inclusive and, typically, a desire to engage more closely. We have made useful new contacts and learned much about how best to communicate with them and to increase the value of what we provide for them. The meetings have also yielded additional hands-on support for our *Summer of IP* campaign.

Having met now with a good proportion of our law firm signatories, we will begin work in 3Q 2023 on a similar programme for in-house department signatories.

4 The six communities

4.1 IP & ME

- April, May and June: online “Coffee Club” discussions
- May: IP & ME committee members attended “Pint of Science” festival events in Manchester, Birmingham and Bradford, inviting supporters to join them for informal talks and socialising

4.2 IP Ability

- May: two guest posts on the website News and Features page:
 - For Deaf Awareness Week, with personal experiences of hearing loss from an IP professional
 - From Chris Naylor at Bnode, as follow-up to his talk at the March webinar “Online, but not forgotten”, with guidance on complying with disability legislation around the world
- June: “How to be Disability Confident – and why it matters” webinar
 - A speaker from the Department for Work and Pensions explained the government’s “Disability Confident” and “Access to Work” schemes, followed by a panel discussion with IP professionals from Disability Confident-certified organisations (including the UK IPO)
- June: “top tips” published for the March *Inclusivity Unlocked!* webinar on online accessibility
- See also our work on (peri)menopause support (5.2 below)

4.3 IP Futures

- Nothing to report this quarter
- Next event planned for late July

4.4 IP Non-traditional Family Network

An informal Bristol “park meet” had been organised for 11 June, but sadly had to be cancelled because of the weather.

This network is now winding down as a formal IP Inclusive community, having decided that the support it provided can now be better offered on a more *ad hoc* basis. The committee co-leads Sarah Phillips, Janine Swarbrick and Julian Crump will continue to be involved with IP Inclusive and to contribute to our events, resources and lobbying work on issues of relevance to solo parents and other non-traditional families. They will also continue to work with our five remaining communities where appropriate. All three have said they would be happy to hear from IP professionals in non-traditional families with suggestions and requests for support; the network's LinkedIn group will remain open for this purpose.

My thanks to Sarah, Janine and Julian, and to Steph Bartley, for setting up the network in 2021, organising so many events and contributing to IP Inclusive projects, in particular through the Covid lockdowns.

4.5 IP Out

- May: "Introduction to gender identity and expression" webinar with Jae Sloan from the Proud Science Alliance
- June: website News and Features post reporting on the May webinar
- June: IP Out received an £800 donation from Triona Desmond, which its committee will allocate to appropriate projects, for example to cover external speaker fees at its events and/or charitable donations
- June/early July: Crystal from *RuPaul's Drag Race UK* (who hosted last year's IP Out quiz evening) invited IP Out supporters to a party to celebrate London Pride, with a 20% discount on tickets
- Throughout 2Q 2023, IP Out continued to collaborate with the Proud Science Alliance, helping to promote one another's events to mark Pride Month in June

4.6.1 Women in IP

- April: collaborated with AIPLA for their Women in IP global networking events
 - In-person gatherings took place in Leeds, London and Manchester, hosted with the help of Women in IP committee members
 - This year's theme was "Own your voice", an encouragement for women to fill up their space and speak up their roles in the IP professions
- See also our work on (peri)menopause support (5.2 below)

5 Resources

5.1 *Inclusivity Unlocked!*

Inclusivity Unlocked! was a programme of events and associated resources to support organisations as they emerge from the Covid-19 lockdowns. Having run 10 events during 4Q 2022 and 1Q 2023, we are now winding down the programme. Events and resources on inclusive hybrid working arrangements, increasingly important post-Covid, will however form part of our next business plan.

During 2Q 2023 we published:

- Reports of two *Inclusivity Unlocked!* webinars from 1Q 2023: “Menopause: what’s changing?” and “Too busy to flourish?”
- Practical “top tips” for these two webinars and also for “Online, but not forgotten” (joint webinar with IP Ability)

The recordings for all of the *Inclusivity Unlocked!* webinars are available on our website Resources page as well as via the individual event posts. The full programme and a compilation of the “top tips” are also on the Resources page.

5.2 (Peri)menopause support

Working group activity in 2Q 2023:

- April: informal online coffee date on the theme of “symptoms, treatments and coping strategies”
- April: website News and Features post reporting on the March “Menopause: what’s changing?” webinar
- Planning a meeting in September to organise further coffee dates with specific themes and/or speakers and to explore the possibility of facilitating “menopause champion” training for IP professionals
- The LinkedIn and WhatsApp groups continue to generate *ad hoc* conversations between IP professionals on issues relating to the (peri)menopause

5.3 Other resources

During 2Q 2023 we published 4 new resources (all webinar recordings, with speaker slides where available), as well as the additional top tips from *Inclusivity Unlocked!* events.

We also published 5 website News and Features posts featuring practical tips and supporting resources from IP Inclusive events. Further posts provided guidance on digital accessibility and support for people with hearing loss (see 4.2 above).

6 Mental health and wellbeing

- April & May: joint webinars with Jonathan’s Voice:
 - “How to have conversations with ourselves and others... and what to do next”, about conducting and acting on conversations about mental health
 - “Using mindfulness at work: a practical introduction”
- May: online round-table meeting on men’s mental wellbeing, again organised jointly with Jonathan’s Voice
 - Followed on from a LawCare round-table on the same theme in February 2023
 - Attendees discussed how best to support men in the IP professions, exploring particular challenges and opportunities as well as possible engagement formats

- In 3Q 2023 Richard Wells (from our Mental Health First Aiders’ Network) and I will work with Jonathan’s Voice on potential follow-up measures
- May & June: website News and Features posts reporting on the two webinars and also on the March *Inclusivity Unlocked!* webinar with LawCare, “Too busy to flourish?”
- Helen Smith, alongside volunteers from our Advisory Board, continued to work with Jonathan’s Voice on an updated version of our website mental health and wellbeing page
- Our (peri)menopause support work is also likely to have value in improving mental wellbeing in the IP professions

7 Extending our reach

7.1 Senior leaders’ diversity think tank

- May: fifth “Pledge Prattle” meeting (an informal online drop-in forum for Senior Leaders’ Pledge signatories and their senior HR and management colleagues), on the theme of parental leave provisions
 - Discussions also extended to (i) other types of long-term leave/sabbatical or flexible working arrangements, for example to accommodate caring responsibilities, to allow someone to pursue an outside interest or learning opportunity, or simply for a break; (ii) support for those who return from an extended period of leave; and (iii) the handling of their workloads in their absence
- May: I met with representatives from CIPA, CITMA, The IP Federation, IPReg and the UK IPO to discuss the potential creation of guidelines and basic sector standards for EDI data gathering, by way of follow-up to the February 2023 think tank meeting with The IP Federation
 - There was unanimous support for collaborating on this project, which will likely begin in 3Q 2023

7.2 IP paralegals and business support professionals

- June: I recorded a *Summer of IP* webinar about careers as an IP paralegal, with panellists representing both CIPA- and CITMA-qualified paralegals
 - The recording will remain as a careers resource for both institutes, and their members, to use when recruiting new paralegals
- I have been invited to speak, on an EDI-related topic of my choice, at CIPA’s Paralegals’ Conference in October
- Paralegals and business support professionals continue to be involved in our (peri)menopause support work, and to attend the associated coffee dates
- A large number of business support professionals from patent and trade mark practices continue to be involved in our Pledge Prattle discussions

7.3 IP solicitors and barristers

- Several IP solicitors and barristers have become involved in the *Summer of IP* campaign, including as event hosts and organisers, as speakers, as providers of employer opportunities and for one-to-one “coffee date” chats
- The Charter signatory outreach meetings have continued to enhance our engagement with law firms and the IP solicitors who work in them

8 Operational

8.1 IPIM

- AGM incorporated into the annual meeting on 18 April 2023
 - 2022 Annual Report (including the 2022 Financial Report) formally accepted
 - New appointments confirmed: Ese Akpogheneta, Robert Andrews, Clair Curran and Lesley Evans
 - Officers elected for 2023-24: Michael Silverleaf as Chair, Gordon Harris as Treasurer, Andrea Brewster as acting Secretary (former Secretary Julia Florence having stepped down from IPIM at the AGM)
 - Breakout discussions yielded useful suggestions for the next business plan: see 8.4 below
- Other meetings held on 2 May and 20 June, plus an informal in-person gathering in London on 26 April for new and existing IPIM members to get to know each other better
- The May meeting:
 - Included a joint session with the Advisory Board
 - Appointed Clair Curran as the new IPIM Secretary
- Updated Register of Interests published on 12 May², incorporating entries for the new members

8.2 Advisory Board

- Meeting held on 2 May; this also involved IPIM and focused largely on the 2023-24 business plan
- The Board continued to provide input into the business plan throughout 2Q 2023
- It has also been discussing its procedures for agreeing, with IPIM, the appointment of new members

8.3 Executive staff

8.3.1 Lead Executive Officer (LEO)

- May: LEO contract updated and signed for the period 1 July 2023 to 30 June 2024

² See <https://ipinclusive.org.uk/ip-inclusive-management/> and <https://ipinclusive.org.uk/the-ip-inclusive-management-team/>

- From 1 July 2023 IPIM will pay the LEO up to £2,750 per calendar month, for 20 hours' work a week; this represents a 10% increase over the period since the LEO was first appointed in July 2019
- It will be the LEO's responsibility to provide for this in the 2023-24 budget and ensure sufficient funds are raised to cover it
- Work done during 2Q 2023 included in particular:
 - Managing and supporting our employees
 - Preparing for and running the 18 April 2023 annual meeting
 - Preparing the 2022-23 business plan and budget, in consultation with IPIM and the Advisory Board, including with respect to associated HR changes
 - Interviewing, appointing, onboarding and supervising a four-week intern (see 8.3.3 below)
 - With help from our intern and Executive Support, preparing for and promoting the Careers in Ideas *Summer of IP* campaign, including coordinating events and employer opportunities, recording introductory talks, and associated website and social media comms
 - Instigating improvements to our online systems (8.5 below)
 - Charter signatory outreach meetings (3.3 above)
 - Involvement in external events (9 below)

8.3.2 *Administrative and executive support*

Anne Burgato and Helen Smith have continued to provide valuable assistance to the LEO and to other parts of the IP Inclusive community.

As workloads increase, and it becomes clear how much more we can achieve with the extra help, we have looked into extending the amount of support we employ. At its 20 June meeting, IPIM agreed to increase Anne Burgato's hours from 8 to 16 a week with effect from 1 September 2023.

IPIM also agreed a salary rise for both employees, with effect from 1 August 2023 (the start of the next budgeting year), from £8,320 pa to £8,900 pa for an 8-hour working week. This is an increase of around 7.6% pa, calculated from their September 2022 start dates.

The additional HR costs, including associated auto-enrolment pension scheme costs, will be provided for in the 2023-24 budget, which will therefore include less provision for intern support. Our accountants Haines Watts will be able to handle the administrative and payroll aspects of the pension scheme.

8.3.3 *Intern*

- From 12 June we were joined for four weeks by intern Ayaan Ali, a future trainee at Clifford Chance who funded her placement under their "LIFT" internship scheme
- The internship went well and Ayaan provided valuable help in promoting *Summer of IP* to schools, universities, outreach charities and IP sector recruiters
- She also:

- Revived the Careers in Ideas Instagram account, in particular to promote *Summer of IP* but also creating new general content
- Met with several IP professionals to learn about their careers in IP
- Attended an IP & ME coffee date and a Charter signatory outreach meeting
- Prepared and delivered a presentation to members of the Careers in Ideas task force, the Advisory Board and IPIM, regarding her work on *Summer of IP* and its longer-term value as well as her more general experiences with IP Inclusive
- Provided a website News and Features post about her internship
- Ayaan worked entirely online, from her home

8.4 Business planning

Throughout May and June I was working on our next business plan, based on stakeholder input from the April annual meeting and Advisory Board recommendations. By the end of 2Q 2023 a final draft was with IPIM and the Advisory Board for their comments before its intended publication towards the end of July.

- “Allyship” will be the theme underpinning all other areas of work
- The provision of more in-person, or at least hybrid, events (including in the regions) will also be a key feature
- We will move this year to a two-year business plan but continue to budget annually
- We will also include provision for some longer-term strategic planning

A 2023-24 budget will be with IPIM, for approval prior to publication alongside the business plan, by early July.

8.5 Websites

- 11 News and Features posts published on the IP Inclusive website during 2Q 2023, 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 approaching *Summer of IP* campaign
- Added 4 items to our website resources page in 2Q 2023 (see 5.3 above), in addition to new *Inclusivity Unlocked!* top tips
- Domain name registrations (originally held by CIPA on trust for IPIM):
 - Ionos account set up in IPIM’s name in June
 - Formal ownership of careersinideas.org.uk transferred to that account, along with “Domain Guard” protection and a facility for associated email addresses
 - We will do the same with ipinclusive.org.uk when it falls due for renewal in July
- During 3Q 2023, I plan to review our website hosting and maintenance arrangements and if possible obtain more cost-effective and responsive alternatives; Advisory Board member Pete Fellows is assisting with this

8.6 Financial

- Bank account balance at 30 June 2023 = £45,288.05

- £11,000 of this is a ring-fenced contingency fund
- Fundraising campaign, to cover the 2022-23 business plan:
 - £54,810.00 of the £80,000 target raised by the end of 2Q 2023; along with the reserve of £27,000 from the previous year's budget, this was ample to cover the 2022-23 operations and will still leave us with a reserve as we enter the next budgeting year (August 2023 to July 2024)
 - We will be launching a new fundraising campaign, for that year, during 3Q 2023
- Key expenditure during 2Q 2023 included:
 - Renewal of MentorLoop subscription for the Careers in Ideas Mentoring Hub: £3,016.80
 - Accountants' fees plus charges for Xero subscriptions and payroll management: £518.40
 - Salaries: £4,199.98
 - Lead Executive Officer fees and expenses: £7,744.90 (of which travel and office expenses = £244.90)

8.7 Other

- IP Inclusive annual meeting held online on 18 April 2023
 - Included updates from the IP Inclusive communities and networks, the formal IPIM AGM and breakout discussions on our 2023-24 priorities and plans
 - The meeting was open to all UK-based IP professionals; representatives from key IP sector organisations were personally invited
- Next year's annual meeting fixed for 16 April 2024
 - It will have a hybrid format, in-person in London and also online, hosted by Allen & Overy

9 Miscellaneous

- April: I spoke at an IP Awareness Network event to mark World IP Day
 - The event celebrated the achievements of women inventors, creators and entrepreneurs around the world; I shared my own ideas about why women can be so resourceful and "can do" in their approaches, how that impacts on people in other under-represented groups, and how inclusivity allows us to amplify the ingenuity and creativeness that results
- April: IPReg published its new regulatory arrangements, in which EDI-related objectives feature in the "overarching principles" of the Core Regulatory Framework as well as the guidance on continuing competence
 - Having taken part in the consultations preceding these changes, we were delighted to see EDI feature so prominently
 - In June we published a website News and Features post about the new arrangements; they come into effect on 1 July 2023

- June: Advisory Board members Caelia Bryn-Jacobsen and Carol Nyahasha represented IP Inclusive at the *Managing IP* awards dinner, where they were invited to say a few words about our work and encourage attendees to get involved
- June: I took part in a joint IP Inclusive and CITMA webinar, “How to create an EDI strategy for lasting change”, alongside Nicola Smith, Inclusion and Diversity Cultural Advisor at the UK IPO, and former CITMA Presidents Kate O’Rourke (Mewburn Ellis) and Richard Goddard (BP)

ARB

17 July 2023