

IP Inclusive Business plan & budget 2022-23



IP INCLUSIVE

Working for diversity and inclusion in IP

These plans are for the period from August 2022 to July 2023. They are based on discussions at our 26 April 2022 annual meeting, the results of our early 2022 impact surveys and input from the IP Inclusive Advisory Board. They build on work done in the previous twelve months (see our 2021 Annual Report¹ and our 2021-22 impact assessment²).

The budget for the anticipated work is provided at the end of the document.

We will continue to work with our supporters to devise more detailed plans and projects. Our communities, regional networks, Careers in Ideas task force and Mental Health First Aiders' Network will also coordinate their activities around the general themes below but will have greater independence to tailor their work for the specific groups and issues they represent.

We welcome feedback and suggestions from all our stakeholders. Please contact us via our Lead Executive Officer Andrea Brewster (abrewsteripinclusive@gmail.com), or write to contactipinclusive@gmail.com.

IP Inclusive Management
1 August 2022

¹ See <https://ipinclusive.org.uk/newsandfeatures/our-2021-annual-report/>

² See <https://ipinclusive.org.uk/newsandfeatures/introducing-our-first-ever-impact-report/>

The business plan

1 High-level objectives

We plan to frame our activities this year around four high-level objectives. The first three build on last year's objectives but are accompanied by updated delivery plans. The fourth brings a new focus on resources and other forms of support, and will itself encompass specific areas such as post-lockdown inclusivity, mental wellbeing and allyship.

The four objectives are:

1. *Improving our engagement with, and support for, our EDI (Equality, Diversity and Inclusion) Charter signatories*
2. *Diversifying the recruitment pipeline, by increasing upstream awareness of the IP professions and improving access, in particular for disadvantaged and currently under-represented groups*
3. *Widening participation in IP Inclusive throughout the IP professions*
4. *Developing the support and resources we provide and improving their accessibility*

We intend to use the theme of “allyship” to connect and reinforce our efforts in all four areas. As usual, our communities will be key to our efforts to reach, encourage and support allies.

Below we set out the specific things we plan to do in pursuit of the high-level objectives. There are significant areas of overlap, and we anticipate progress in each being of value to the others.

2 Our EDI Charter (objective 1)

Improving our engagement with, and support for, our EDI Charter signatories

We plan to:

- Increase the range of resources available to help signatories comply with the Charter commitments (see 5 below)
- Facilitate the sharing of ideas, experiences and support between signatories, through our regional networks and other appropriate forums

- Work with the IP Federation to share best practices between industry and private practice, and to incentivise use of the Charter and Senior Leaders' Pledge³ to establish EDI credentials in business partnerships
- Encourage signatories to involve team members in all roles and at all levels, including EDI allies, in IP Inclusive activities
- Develop the Senior Leaders' Pledge:
 - Review its impact with the leaders' think tank⁴, alongside guests from HR and other business support roles
 - If necessary in response to the review, tailor the pledge and its supporting structures
 - Improve take-up, including outside the patent and trade mark professions
- Re-run our 2022 survey in early 2023, asking signatories to reconfirm their commitment to the Charter pledges, update their contact details, share useful experiences and help shape IP Inclusive's plans

Provided we have an intern to help with IP Inclusive comms (see 7 below), we hope to:

- Establish informal "drop-in" discussion forums for signatories' representatives to meet with both key IP Inclusive personnel and one another to exchange ideas, provide feedback and discuss their expectations of, and contributions to, IP Inclusive

3 Diversifying the recruitment pipeline (objective 2)

Increasing upstream awareness of the IP professions and improving access, in particular for disadvantaged and currently under-represented groups

This objective will be pursued through our Careers in Ideas outreach campaign⁵.

We plan to:

- Recruit an intern to help coordinate Careers in Ideas comms and outreach activities (see 7 below)
- Bring more paralegals, business support staff, solicitors, barristers, in-house IP professionals and tech transfer professionals onto the Careers in Ideas task force
- Improve representation of these groups on the website and in associated comms
- With help from our senior leaders' think tank, the IP Federation and other IP sector bodies, coordinate a "summer school" of work experience opportunities, open days and awareness-raising events

³ See <https://ipinclusive.org.uk/the-ip-inclusive-senior-leaders-pledge/>

⁴ See <https://ipinclusive.org.uk/newsandfeatures/new-senior-leaders-diversity-think-tank/>

⁵ See <https://ipinclusive.org.uk/careers-in-ideas/>

We will continue to:

- Maintain the Careers in Ideas Mentoring Hub, to recruit new mentors and mentees, and to generate positive case studies to use in our outreach materials
- Develop our directory of volunteers willing to do outreach work on behalf of Careers in Ideas, and ideally establish an associated Careers in Ideas mailing list to communicate and coordinate outreach opportunities
- Develop our network of contacts among relevant external organisations (in particular those focused on socioeconomic mobility, access to the professions and/or groups currently under-represented in the UK’s IP sector), to help us promote the Careers in Ideas resources and opportunities
- Add to our collection of short “Meet the IP Crowd” videos from individual IP professionals
- Improve university links by gathering information about current outreach activities in the IP professions and using it to target and coordinate future work

Resources permitting, we will aim to:

- Rebuild the Careers in Ideas website
 - Improve its structure, functionality and editability
 - Use it as a platform for an updated, more accessible and potentially more interactive version of the “careers pathways map”
 - Rejuvenate the “opportunities” page, to create a go-to resource for potential recruits seeking open days, work placements, internships etc with inclusive employers

4 Widening participation (objective 3)

Widening participation in IP Inclusive throughout the IP professions

We plan to:

- Increase IP Inclusive’s engagement with:
 - IP paralegals
 - Business support staff
 - IP solicitors
 - IP barristers
 - In-house IP professionals
 - Technology transfer professionals
- Improve their representation in our communities, networks and working groups
- Work with our Advisory Board, communities, regional and other networks, senior leaders’ think tank and IP sector contacts to:

- Tailor the support, resources and events we provide for them, including by establishing new communities or networks if appropriate
- Target our awareness-raising activities to appropriate forums
- Encourage event attendees to invite guests from these groups

We also plan to:

- Continue to encourage and support the involvement of allies and of other IP professionals who are not currently engaged with the IP Inclusive cause, aiming to transform non-engagers and sceptics into allies and champions
- Working with the IP Federation, update the Charter and Senior Leaders' Pledge³ for ease of uptake by in-house departments and teams
- Encourage the exchange of ideas and support between IP professionals at different levels of seniority
- In particular through our communities, networks and Careers in Ideas campaign, increase our engagement with relevant external organisations

5 Developing support & resources (objective 4)

Developing the support and resources we provide and improving their accessibility

We will continue to provide educational, knowledge exchange and network-building events; event reports and recordings; guidelines; collations of resources and contacts available elsewhere; and access to support networks and discussion forums for IP Inclusive supporters.

Some of these will be generated by our communities, networks and Careers in Ideas task force. Where appropriate, we will seek input from experts outside the IP sector, widening our supporters' access to EDI-related contacts and expertise.

We plan to focus this work in particular on:

- Active and effective allyship
 - This will include completion of our AskME directory of speakers and other volunteers from minority ethnic backgrounds
- Inclusivity of workplaces and working arrangements post-lockdown
 - This will take the form of an "Inclusivity Unlocked!"⁶ programme of events, resources and website posts
- Mental wellbeing
 - (In collaboration with Jonathan's Voice and LawCare, and informed by the results of our May 2022 mental wellbeing survey)

⁶ See <https://ipinclusive.org.uk/newsandfeatures/introducing-inclusivity-unlocked/>

- Inclusivity for IP professionals going through the menopause or peri-menopause
- Inclusivity for IP professionals who are retired, approaching retirement or thinking about changes to their work-life balance later in their careers
- Resource-efficient measures for improving EDI within organisations, in particular small and medium-sized organisations

We also plan to:

- Improve awareness of, and access to, IP Inclusive events and resources, with upgrades to the relevant website pages where helpful
- Continue to run virtual and “hybrid” events, and to provide online resources, to optimise accessibility and reach

6 Supporting our volunteer base (all objectives)

As ever, our volunteers will be crucial to achieving our high-level objectives. We will continue to support the work they do under the IP Inclusive banner, with guidance, coordination, administrative and organisational backup, comms and promotion.

IP Inclusive Management, primarily through its Lead Executive Officer and other executive staff (see 7 below), will continue to guide, support and champion their activities.

In particular we will assist the IP & ME community with their committee restructuring and proposed new activities.

7 The executive team

A larger team of executive staff will put IP Inclusive in a better position to pursue its objectives, by strengthening and streamlining the supporting infrastructure. We made significant progress in this direction during 2021 and early 2022, raising the necessary funds, obtaining professional advice and establishing appropriate systems and policies; we also worked with a temporary intern to trial this form of support. We are now in a position to move to more permanent staffing arrangements.

We plan to:

- Appoint an administrative support for 2 half-days a week
- Appoint one or more interns to provide, over 4 half-days a week:
 - Help with stakeholder communications, in particular for Charter signatories
 - Support for Careers in Ideas projects

The budget

<i>Item</i>	<i>In</i> £	<i>Out</i> £	<i>Notes</i>
Fundraising campaign target	80,000		
HR costs:			
LEO fees		30,000	1
LEO expenses (travel, office & misc professional costs)		3,000	2
Additional LEO fees for managing recruitment, appointment and onboarding of support staff and interns		700	3
Administrative support		9,000	4
Intern to help with general IP Inclusive comms		5,300	5
Intern to help with Careers in Ideas projects		5,300	5
IT & comms:			
Website hosting & domain name registrations		1,300	
Mailchimp & SurveyMonkey accounts		1,000	
Xero subscription for online accounting		400	6
MentorLoop subscription (Careers in Ideas Mentoring Hub)		6,700	
Website maintenance		2,000	7
Other operating costs:			
Accountants' fees		1,500	8,6
Third party liability insurance		400	
Other (bank charges, data protection fee)		400	
Contingency fund annual top-up		1,000	9
Additional costs, if funds allow:			
Careers in Ideas website upgrade		12,000	
Totals	80,000	80,000	
PLUS:			
Ring-fenced contingency fund	(10,000)		
Reserve remaining from 2021-22 budget	(27,000)		10

Notes

1. The LEO is paid a maximum of £2,500 pcm, as a contractor, for 2.5 days' work a week. Additional work on specific projects is accommodated within the relevant project budgets where necessary.
2. Whilst the LEO works largely from their own office, they need to travel occasionally to attend key events; we have allowed for about one such trip a month, plus a small amount for office expenses.
3. Approximately 3 extra days at a consultancy rate of £230/day.
4. Annual salary of £8,320 (for 8 hours a week), plus payroll costs, reimbursement of some home office expenses, and a contingency for a small number of additional hours at busy times.
5. These two roles may be covered by a single intern. Overall we have allowed for 4 half-days (16 hours) a week of intern support, and assumed a salary of £11.75 an hour (the current "Real Living Wage" for London is £11.05 an hour⁷). The figures include payroll costs, employer's NI where applicable and a small allowance towards intern office expenses.
6. Our Xero subscription is managed by our accountants Haines Watts; this streamlines the preparation of annual accounting reports and tax documentation, thus reducing the overall accountancy fees.
7. We have allowed £400 for essential fixes and upgrades, in case of unforeseen technical issues with the IP Inclusive and Careers in Ideas websites (both of which are business-critical for organising and promoting IP Inclusive's activities), plus £1,600 for anticipated upgrades to the IP Inclusive website events, calendar, community, mailing list sign-up and "News and Features" pages.
8. Includes set-up and training costs for the Xero account and outsourced payroll system.
9. The ring-fenced contingency fund already contains £10,000, as provided in the 2021-22 budget; this represents approximately two months' worth of operating costs. Our aim is to increase the fund annually to take account of corresponding cost increases.
10. The under-spend on the 2021-22 budget was largely caused by lack of time to recruit administrative and intern support as early as we had hoped, which in turn reduced our capacity to progress some of our other plans. We intend to devote this reserve to (a) additional HR support during 2022-23, if necessary on specific projects; (b) widening the scope of the Careers in Ideas website upgrade; and/or (c) one or two smaller *ad hoc* projects should appropriate needs or opportunities arise.

⁷ See <https://www.livingwage.org.uk/what-real-living-wage>