



IP INCLUSIVE

Working for diversity and inclusion in IP

Annual Report 2022

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IP Inclusive Annual Report 2022

2022: Impact and growth

Foreword by Andrea Brewster OBE

We began 2022 by asking ourselves some searching questions about our impact. We wanted to know how well we were delivering on our mission to promote equality, diversity, inclusion (EDI) and wellbeing in the UK's IP professions.

We could have simply quoted statistics about the work we've been doing: numbers of events and resources published, for instance. But in a field like ours, we felt the best way to find out if we were making a difference was to ask our stakeholders. In particular, what did they think the sector would look like if IP Inclusive didn't exist?

Our February impact survey yielded encouraging responses, both from our Charter signatories and from individual IP professionals. It told us that IP Inclusive is successfully raising awareness of EDI issues; starting meaningful conversations; giving people the confidence to speak out; and providing the leadership, drive and coordination that can catalyse change. Respondents were clear: without IP Inclusive, progress in this area would be slower, less "joined-up", less well informed – and the IP sector as a whole would be the poorer for it.

This fits with my own observations. When IP Inclusive launched in 2015, many people questioned its relevance. Now virtually every organisation, from small private sector firms upwards, has at least someone whose role it is to see that EDI is on the agenda and appropriately addressed. There is a growing appreciation of its business benefits: today's leaders understand its effects on recruitment and retention of staff and on their performance. Individual IP professionals now talk about EDI in ways, and in forums, that would have seemed alien when IP Inclusive began. They are more open about their identities; they share their experiences and help others do the same. Alongside this, wonderful relationships are being built between under-represented groups and their allies.

I like to think – and our survey results confirmed this – that IP Inclusive provides a nucleus around which everyone in the IP sector, with their increasing EDI interests, can gather and collaborate. It is a catalyst, but also, at a more practical level, a mechanism for coordinating and amplifying our sector's response to all manner of EDI-related stimuli in the IP and wider communities. Our organisations now share best practices as they rarely would have done before, for the good of the entire sector. Inclusivity is being woven into the fabric of the IP professions. As IP Inclusive flourishes, so too does the community it stems from.

Armed with the feedback and suggestions from our impact survey, we felt ready to expand at last. We took on our first intern, then two further executive team members. It was a scary phase in our development but it has been very much worth it. We've been able, in particular during the second half of 2022, to increase the support we provide for our volunteers and to produce an array of extra events and resources to help people with their EDI work. We're particularly proud of our *Inclusivity Unlocked!* programme, which in response to demand from several quarters has focused on rebuilding after the pandemic, making the most of this unique opportunity to create more inclusive and accessible working environments.

Other noteworthy initiatives in 2022 included an online discussion forum for our Senior Leaders' Pledge signatories, the reinvigoration of our IP & ME committee, and early plans for a 2023 Careers in Ideas *Summer of IP* to improve awareness of, and access to, IP careers. The latter is a campaign we hope will engage supporters from across the sector and in turn help us widen our reach. To us, anyone who works in IP – whether directly, or indirectly through the people they supply or procure from – is an “IP professional”; we want all of them to be involved.

The better-structured IP Inclusive we've been developing this past year can face the future with confidence. We have funding and generous contributions from across the sector, and a clear endorsement of our work so far. We have the resources to engage with an even wider range of IP professionals and provide them with still richer sources of support. We have had an impact and we can continue to do so. Over the next twelve months, then, we will pursue with increasing vigour our mission to improve EDI and wellbeing in our community.

I would like to thank everyone who was involved, in whatever way, in our 2022 activities. From our donors, event hosts and partner organisations, to our executive and management team, Advisory Board and hundreds of volunteers, without you all none of this great work would have been able to happen. IP Inclusive is an expanding, flourishing enterprise. Like all good collaborations, it is so much greater than the sum of its parts.

Andrea Brewster OBE (she/her)
Lead Executive Officer
IP Inclusive

1 Our 2022-23 strategic objectives

Our latest business plan, published on 1 August 2022¹, set out four high-level objectives around which to frame our activities for the period from August 2022 to July 2023. The first three built on the previous year's objectives but were accompanied by updated delivery plans. The fourth brought a new focus on resources and other forms of support, and itself encompassed specific areas such as post-lockdown inclusivity, mental wellbeing and allyship.

There are significant areas of overlap between the four objectives, and we anticipate progress in each being of value to the others. They 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*

Where appropriate we are using the theme of “allyship” to connect and reinforce our efforts in all four areas. Our communities remain key here, helping us to reach, encourage and support more allies.

Since our volunteers are crucial to achieving the strategic objectives, our 2022-23 business plan also included the development of our executive team (see 9.4 below) in order to provide them with better support.

This report describes the specific things we did during 2022 to pursue the above objectives and their precursors from the 2021-22 business plan².

2 Our EDI Charter (strategic objective 1)

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

2.1 General

Our EDI Charter scheme³ is our main vehicle for promulgating best practices throughout the IP professions, in particular at the organisational level. It is open to all UK-based organisations that work in or with the UK's IP professions, whatever their size or the type(s) of product or service they provide. It is a voluntary, self-certifying code of practice with six high-level commitments, by which

¹ See <https://ipinclusive.org.uk/newsandfeatures/the-journey-continues-our-2022-23-business-plan/>

² See <https://ipinclusive.org.uk/newsandfeatures/the-road-ahead-ip-inclusives-2021-22-business-plan/>

³ See <https://ipinclusive.org.uk/about/our-charter/>

signatories make a public endorsement of support for equality, diversity and inclusion within their sector.

Our signatories provide a rich seam of ideas and experience, of feedback on our current and past work and of input into our future plans. They are also our main source of income: by the end of 2022, 24 signatories had together contributed £44,600 to our 2022-23 fundraising campaign.

During 2022 we acquired 8 new Charter signatories; these included 3 small private sector patent and trade mark firms, an IP law firm, an IP consultancy, a law firm with a specialist IP department, a trade mark research and protection service provider, and the mental wellbeing charity Jonathan's Voice.

Following data clean-up checks, 5 signatories were removed from our database, due either to their closure or acquisition or to their failure to supply up-to-date contact details. Two of the new signatories were the acquirers of previously removed ones.

The remaining signatories (156 at the start of 2023, compared to 153 at the start of 2022) continue to represent a wide range of entities in terms of size, structure, location, areas of practice and business model; they include membership bodies, suppliers to the IP sector, the IP Regulation Board (IPReg) and the UK Intellectual Property Office (IPO). All are listed on our website⁴.

Many of our Charter signatories have representatives on the senior leaders' diversity think tank (see 4.3 below) and/or who have signed our Senior Leaders' Pledge (2.5 below); this helps us to build more effective relationships with our community of signatories.

2.2 Charter signatories' survey

This year we surveyed our signatories in order to form a better idea of our impact on, and value to, the sector. This information was used as the basis for our first ever formal impact report. The results were encouraging: 32 signatories responded, the majority of whom said they valued our events, networking opportunities and resources, as well as the exchanges of ideas we facilitate with others in the sector. They also valued the fact that the Charter had helped them to demonstrate their EDI values and credentials, both internally and externally.

Most respondents felt that being an IP Inclusive Charter signatory had had a positive impact on their organisations, providing the impetus to embark on or develop their EDI efforts, opening dialogue and encouraging individual members of staff to engage. 72% said they believed IP Inclusive had had a positive impact on inclusion within their organisations, and 90% that it had had a positive impact on inclusion within the wider UK IP sector.

The Charter signatories' survey included opportunities to confirm the six Charter commitments and to update contact details if necessary. Whilst 32 respondents (nearly 21% of our signatories at the

⁴ See <https://ipinclusive.org.uk/about/charter-signatories/>

time) was a reasonably-sized population from which to draw conclusions about our impact, it does show that we have work to do in ensuring good levels of communication with our signatory base, and in helping them all to engage meaningfully with the Charter scheme.

There is more about the impact survey results at 8 below.

2.3 The regional networks

Our four regional networks⁵ provide opportunities for signatories from specific areas to share ideas and support one another in fulfilling the Charter commitments. This in turn helps us to reach more people, and to provide better tailored events and resources. The networks are generally run by small, informal committees which include representatives from local organisations.

Three regional events were held during 2022:

- In May, a Scotland Network in-person breakfast meeting, in association with Women in IP, to discuss the return to work and hybrid working. This event was similar in format to the Women in IP coffee dates (see 6.7.2 below) and was hosted by CMS Cameron McKenna Nabarro Olswang.
- In September, a Midlands Network joint social event with IP Out (drinks in central Birmingham the day before Birmingham Pride).
- In December, a joint Midlands Network and IP & ME Hanukkah/Chanukah/Christmas get-together at the Oxford Christmas market.

A further Scotland Network meeting has been planned for late January 2023, this time in a hybrid format, on the theme of unconscious bias.

Attendance at regional social events was patchy this year, suggesting that the role of the regional networks may need to change as more working hours are spent at home or in other remote locations rather than based in a particular office. We have therefore organised a January 2023 meeting of regional network committee members, to discuss the networks' roles from here on, explore new models for regional get-togethers and support one another.

A 2022 highlight for the North of England Network was the inclusion of its committee lead Vanessa Stainthorpe in *World IP Review's* 2022 "Diversity Champions in IP" list, published in its *WIPR Diversity* issue in October. Vanessa is also a member of the IP Inclusive Advisory Board.

Each regional network has its own section in the IP Inclusive mailing list, allowing it to target notifications, updates and invitations to relevant people. These sections included, at the start of 2023, 42 subscribers for the Midlands Network, 70 for the North of England, 56 for Scotland and 112 for the South West (compared with 41, 70, 54 and 105 respectively at the start of 2022). The North

⁵ See <https://ipinclusive.org.uk/our-regional-edi-charter-networks/>

of England Network has its own email address, YouTube channel and LinkedIn group, of which the latter had 60 members at the start of 2023 (the same as at the start of 2022). The Scotland Network's LinkedIn group, established in early 2021, had 52 members (48 at the start of 2022).

2.4 Charter signatory resources and comms

IP Inclusive's growing collection of free resources, along with our training and awareness-raising events, helps signatories to fulfil the Charter commitments. Our 2022 impact survey showed that they were valued and that signatories want us to continue providing them.

There is more information about the IP Inclusive resources at 5 below. Of particular note this year were:

- Our Women in IP community's collection of "Quick wins for Charter signatories" published in February (see 6.7.3 below).
- The *Inclusivity Unlocked!* campaign (5.2 below), designed to help signatories with EDI as they emerge from the pandemic.
- Our new "Pledge Prattle" forum (2.5 below), which provides excellent opportunities for senior professionals in signatory organisations to share ideas and best practices, and to collaborate to improve standards across the sector.

During the first half of 2022, our Lead Executive Officer Andrea Brewster held discussions with several Charter signatories, at their instigation, regarding their involvement in IP Inclusive activities. With the help of our new executive support team, we hope to organise more of these informal meetings during 2023 in order to develop our relationships with individual signatories, in particular among less-engaged groups such as law firms, barristers' chambers and in-house departments (see also 4.1 below).

Throughout the year we continued to update the Charter signatories' "designated EDI officers" on our work, roughly fortnightly, through our mailing list. Again our new executive staff are allowing us to improve our Charter signatory database and to issue more targeted communications to signatory contacts.

2.5 The Senior Leaders' Pledge

The IP Inclusive Senior Leaders' Pledge⁶, introduced in July 2021 by our senior leaders' think tank, has strengthened our engagement with many signatories, particularly those in the patent and trade mark sector. The pledge is intended to encourage visible championing of EDI at the highest levels of our signatory organisations. It is a personal rather than organisational scheme and involves eight

⁶ See <https://ipinclusive.org.uk/the-ip-inclusive-senior-leaders-pledge/>

generic commitments. These are accompanied by suggestions for practical steps that could be taken to demonstrate each of them: individual signatories tailor their versions of the pledge, selecting measures for each of the eight commitments that are appropriate for them and their organisations. We believe this simple scheme is helping our Charter signatories improve their EDI efforts.

The think tank held a plenary catch-up meeting in June 2022 to review the impact of the pledge and discuss improving take-up, support for signatories and the sharing of best practices. As a result we established the “Pledge Prattle” forum: a series of informal, drop-in online discussions for signatories and their senior HR and management colleagues to share experiences – and occasionally hear from external experts – regarding specific aspects of the pledge and its implementation. These half-hour gatherings (which are not recorded) have proved both popular and candid. The first, in October 2022, looked at tailoring the Senior Leaders’ Pledge to fit the organisational culture and the best ways to publicise it so as to maximise its impact. A second, in November, tackled talent retention, exploring strategies to reduce diversity “leakage” as employees progress through an organisation. The next Pledge Prattle has been scheduled for late January 2023, on the theme of EDI policies.

During 2022 we also worked with the IP Federation on a version of the Senior Leaders’ Pledge tailored for in-house department heads. We are hoping this can be rolled out in the first half of 2023 and that it will in turn encourage more in-house departments to engage with IP Inclusive and in particular to sign up to our Charter. If successful, other tailored versions – for example, suitable for barristers or for IP department heads in larger law firms – could potentially be considered.

At the start of 2023 there were 96 pledge signatories to the Senior Leaders’ Pledge, compared to 88 at the start of 2022.

2.6 Key contacts

The EDI Charter group as a whole is coordinated by Andrea Brewster, with help since September 2022 from our Administrative Support Anne Burgato. Anne is responsible for administering the scheme, maintaining records and communicating with signatories.

The committee members for the four regional networks are:

- Midlands: Helen Bartlett (Potter Clarkson); Lynne Jackson (Marks & Clerk; committee co-lead); Claire O’Brien (Mills & Reeve); Gareth Probert (EIP); Philippa Roberts (Withers & Rogers); Hannah Thorne (Marks & Clerk; IP Futures representative); Dan Tough (Withers & Rogers); Jennifer Unsworth (HGF; committee co-lead).
- North of England: Catherine French (Sacco Mann); Abdulmalik Lawal (Franks & Co; IP & ME representative); Liam O’Connor (Marks & Clerk); Kerry Russell (Shakespeare Martineau); Vanessa Stainthorpe (HGF; committee lead); Joanna Thurston (Withers & Rogers).

- Scotland: the Scotland Network is led by Laurence Cheney (Murgitroyd), Rachel Gillan (CMS Cameron McKenna Nabarro Olswang), Margaret Hastie (Murgitroyd) and David Blair (AA Thornton). The committee is also supported by representatives of Brodies, BTO, Burness Paull, Cameron IP, Capella IP, Dentons, HGF, Hindles, Innovare IP, IP Pragmatics, KPIP, Lawrie IP, Lean IP, Lincoln IP, MacRoberts, Marks & Clerk, Morton Fraser, Ouzman IP, Scintilla IP, Shepherd and Wedderburn, Snapdragon IP and Thorntons Law, who have been involved in its recent activities, as have a number of in-house IP professionals.
- South West: Susan Antoine and Caroline Day (Haseltine Lake Kempner); Megan Jefferies (Thrings; committee co-lead); Andrew Mears (Mewburn Ellis); Jonny Lerwill (Airbus Defence & Space; IP Out representative); Fiona McBride (Withers & Rogers; committee co-lead); Jim Pearson (Abel + Imray).

3 Careers in Ideas (strategic objective 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.

3.1 General

As in 2021, we have been addressing objective 2 through Careers in Ideas⁷: this is IP Inclusive’s outreach initiative, designed to raise awareness of IP-related careers and encourage recruits from a wider range of backgrounds.

In 2022 we had help from an intern, Susan Nelson (see 9.4.2 below), a significant proportion of whose time was devoted to Careers in Ideas projects. During her five months with IP Inclusive Susan established and maintained a Careers in Ideas Instagram account, created online content for the Instagram account and the Careers in Ideas website news pages, handled email queries generated through the website and began preparations for the 2023 *Summer of IP* campaign (3.6 below).

The work of the Careers in Ideas “task force” was praised by respondents to our 2022 impact survey, one individual saying that they valued IP Inclusive because it “encourages people from all different backgrounds to consider careers in IP”. 64% of the Charter signatory and 74% of the individual respondents were keen for us to continue to promote, and improve access to, IP sector careers.

The task force met in February and June 2022. A working group including both task force members and other interested volunteers also met in July and October to start planning for *Summer of IP*.

⁷ See <https://ipinclusive.org.uk/careers-in-ideas/> and <https://careersinideas.org.uk/>

3.2 The Careers in Ideas Mentoring Hub

The Careers in Ideas Mentoring Hub⁸ was launched as a pilot in December 2021 and continued to develop during 2022. No longer in the pilot phase, it continued to recruit new mentees during 2022 and by the start of 2023 had 55 registered mentees and 35 mentors (the corresponding figures at the start of 2022 being 27 mentees and 17 mentors).

The scheme is designed to help higher and further education students navigate their way into IP sector careers. It is hosted on the online MentorLoop⁹ platform, which helps us streamline processes, reduce the administrative burden and generally ensure that both mentees and mentors get the best out of their interactions. Mentor-mentee matching and communications take place via the platform, so as to provide an appropriate degree of privacy and protection for all participants. During 1Q 2022 we secured funding to renew the MentorLoop subscription for at least a further six months; future subscriptions are provided for in our 2022-23 business plan and budget. We were therefore able to renew the subscription, in each case for a further six months, in both May and November 2022.

A cohort of new mentors was trained in 1Q 2022. A further training course is being organised for January 2023, which will then allow us to accept more mentees. The training continues to be delivered primarily by task force member Julie Barrett – who provides workshops on the role and remit of a mentor and practical guidance for the situations they might encounter – along with guidance from the scheme leader Carol Nyahasha on the MentorLoop platform and on the formal support and safeguards available for participants through IP Inclusive.

The Mentoring Hub hosts a collection of resources for both mentees and mentors, including the mentor terms of reference, mentee guidelines, general information about IP-related careers, and recordings and presentations from the mentor training sessions.

Feedback from this scheme was positive during 2022. Several mentees went on to secure IP sector traineeships. In our 2021-22 impact report, one of the mentors is quoted as saying that involvement in the Careers in Ideas Mentoring Hub is “one of the most rewarding things I have ever done”, whilst mentee quotes included “My mentor’s advice has been invaluable” and “I am so thankful ...I really think it helped with my applications”.

3.3 National Careers Week

For National Careers Week¹⁰ in March 2022 we created new resources including:

- A set of bite-size “Meet the IP Crowd” videos for school students and their career advisers¹¹.

⁸ See <https://ipinclusive.org.uk/careers-in-ideas-mentoring-hub/>

⁹ See <https://mentorloop.com/>

¹⁰ See <https://nationalcareersweek.com/>

¹¹ See <https://ipinclusive.org.uk/resources/meet-the-ip-crowd-videos/>

- This series, in which people in IP jobs shared their thoughts about what they do and why they enjoy it, included a 5-minute general video about why now is a good time to be thinking about a career in the IP sector.
- A video to illustrate the roles played by patent and trade mark attorneys when a client wants to protect a new idea.

We also re-ran, with IP Futures, our November 2020 and September 2021 online “careers clinic”, with personal perspectives from early-career IP professionals and facilitated breakout discussions.

3.4 Other 2022 highlights

In February 2022 we published a commitment from members of our senior leaders’ think tank to work alongside Careers in Ideas to improve awareness of, and access to, the IP professions¹². We are hoping to build on this in particular by seeking their involvement in our 2023 *Summer of IP* campaign.

In the meantime, both Careers in Ideas and individual think tank members have continued to work with relevant charities and outreach groups outside the IP sector (which are showcased in our directory for IP professionals¹³). The IP Inclusive website News and Features page has featured updates on partnerships between IP sector organisations and the charity In2scienceUK, whilst other organisations have been encouraged, through Careers in Ideas, to work with charities such as Generating Genius and The Sutton Trust. In February 2022 our Lead Executive Officer Andrea Brewster spoke at a Boulton Wade Tennant and Sutton Trust student workshop, about EDI in the IP professions and the work of Careers in Ideas.

We will be taking these collaborations a step further in January 2023 through a joint webinar with the Chartered Institute of Patent Attorneys (CIPA), in which representatives from Generating Genius, In2scienceUK and The Access Project will speak about mentoring, coaching and similar volunteering opportunities for patent professionals. The webinar will also feature contributions from CIPA members about their involvement with these charities. We hope to run similar future events with the Chartered Institute of Trade Mark Attorneys (CITMA) and/or other IP sector membership groups.

3.5 Social media and comms

February 2022 saw the creation of a new Careers in Ideas profile page on LinkedIn, run by task force member Carol Nyahasha. In June we also established a Careers in Ideas Instagram presence, set up and initially run by our intern Susan Nelson. We posted a mini-series of “stories” introducing the key types of IP, which were then mirrored in posts on the website news pages.

¹² See <https://ipinclusive.org.uk/newsandfeatures/sharing-our-privileges-high-level-outreach-access-commitments/>

¹³ See <https://ipinclusive.org.uk/resources/careers-in-ideas-directory-of-outreach-organisations/>

A team of people from the task force update the Careers in Ideas website, LinkedIn group and Twitter account and respond to visitor queries when necessary. The LinkedIn group had 112 members at the start of 2023 (99 at the start of 2022), with the new profile page having 204 followers. The Twitter account (@CareersInIdeas) had 596 followers at the start of 2023, compared to 591 at the start of 2022. On Instagram @careersinideas had 61 followers at the start of 2023.

During 2022, the Careers in Ideas website carried 10 news posts. These covered a podcast about routes into patent and trade mark attorney careers, why now is a good time to consider a career in IP, our National Careers Week resources, the role of an in-house patent attorney, our new Instagram account and the *Summer of IP* plans, as well as the mini-series referred to above on key types of IP.

The IP Inclusive website News and Features page also featured a guest post, in August, from the outreach and social mobility charity In2scienceUK, which continues to foster strong links with the IP professions based on its relationship with Careers in Ideas. A news post about *Summer of IP* appeared on the IP Inclusive website in September.

See 11.2.2 below for more about the Careers in Ideas website.

3.6 *Summer of IP: planning for 2023*

We began planning our Careers in Ideas *Summer of IP* campaign¹⁴ in July 2022. It is intended as a suite of awareness-raising events and “taster” opportunities, some provided by Careers in Ideas and some by individual IP sector employers. It will run from early July (we hope to launch on British IP Day on 6 July) throughout the summer of 2023.

The Careers in Ideas events will be introductory in nature, raising awareness about IP generally and the careers available in the sector. They will include re-runs of both our online “masterclass”¹⁵ offering guidance on the application and interview process for students hoping to train as patent and/or trade mark attorneys, and our “careers clinic” with IP Futures (see 3.3 above).

We are currently inviting IP sector employers to take part by providing an activity such as a taster day or half-day, a work experience placement, a mentoring opportunity or a talk to inspire new recruits. Careers in Ideas will publish a central listing of all the available activities, providing an umbrella under which, and contacts through which, the activities can be promoted to a wider audience than usual. We hope they will cover a range of different roles and target would-be recruits from diverse backgrounds and levels.

During the second half of 2022 we established a working group, within the Careers in Ideas task force, to run *Summer of IP*. We also created a prospectus¹⁶ and registration form (the latter including

¹⁴ See <https://ipinclusive.org.uk/careers-in-ideas/summer-of-ip-2023/>

¹⁵ See <https://ipinclusive.org.uk/events/applying-to-train-as-a-patent-or-trade-mark-attorney-june-2021/>

¹⁶ See <https://ipinclusive.org.uk/wp-content/uploads/2022/11/221123-summer-of-ip-prospectus.docx>

taster session ideas) for employers wishing to participate; and built a dedicated *Summer of IP* page on the IP Inclusive website. The project was initially planned and coordinated by our intern Susan Nelson; it is now being led by our Executive Support Helen Smith.

3.7 Key contacts

The Careers in Ideas task force lead is Chris Burnett (Birkett Long). Its current members are: Julie Barrett (PurposiveStep Consulting); Andrea Brewster (IP Inclusive); Rebecca Brooks (Mewburn Ellis); Julie Browne (Shell); John Enser (CMS Cameron McKenna Nabarro Olswang); Sally Lingjun Gao (Mathys & Squire); Joshua Green (Kilburn & Strode); Thomas Hailes (Beck Greener); Gordon Harris (Gowling WLG); Jay Janusz (Boult Wade Tennant); Charlotte Jones (Viatrix & RSC Law Group); David Joo (Aon); Philip Lawrence (IPO); Alison Lawson (Zacco); Stephanie Learoyd; Joseph Letang (Dehns); Ayesha Malik (University of Law); Carol Nyahasha (Elkington & Fife); Natasha Perks (Abel + Imray); Monifa Phillips (Appleyard Lees); Anna Rice (IPO); Heather Scott (Gill Jennings & Every); Polly Shaw (Dehns); Cherry Shin (HGF, formerly Appleyard Lees); Helen Smith (IP Inclusive); Sheila Wallace (Marks & Clerk); Ellie Wilson (Mishcon de Reya); and Connor Yap (Sagittarius IP).

Also involved in the *Summer of IP* working group are Brenna Howley (Gill Jennings & Every); Anna Matthew (Powell Gilbert); Jo Spreckley (Marks & Clerk); and Tess Waldron (Powell Gilbert).

The Mentoring Hub is run by Carol Nyahasha (project lead), Julie Barrett and Natasha Perks.

The Careers in Ideas website and social media accounts are managed by Andrea Brewster, Rebecca Brooks, Joshua Green, Thomas Hailes, Jay Janusz, Ayesha Malik and Ellie Wilson.

4 Widening participation (strategic objective 3)

Widening participation in IP Inclusive throughout the IP professions.

4.1 General

Involvement in IP Inclusive is open to anyone who works in the UK's IP sector. Historically our greatest levels of engagement have been from patent and trade mark attorneys, but during 2022 we also saw increasing amounts from the business support professionals who work alongside them. We recognise, however, that there is still work to do in persuading other professionals such as IP barristers, paralegals and solicitors – as well as information scientists, licensing executives, tech transfer specialists and other less well-represented communities – to join our networks and events.

In 2021 our Advisory Board had emphasised the importance of involving, for example, more business support and other non-attorney professionals. Breakout discussions at our April 2022 annual meeting, which was attended by a wide range of IP sector stakeholders, also recommended prioritising outreach to these groups. It therefore became a key part of our 2022-23 business plan.

The Advisory Board itself remains important in this regard, since its members represent a variety of roles, organisations and career levels. Together they can significantly improve our understanding of, and hence engagement with, the community that IP Inclusive serves. Our governing body IP Inclusive Management (IPIM) has continually sought their guidance, as well as the views of other IP Inclusive communities and networks, on how best to reach under-represented groups. Since IPIM’s members include patent and trade mark attorneys, an IP solicitor, two IP barristers and two in-house IP professionals, we have access to a range of perspectives for our strategic planning.

Some of our ongoing outreach work will be done through the EDI Charter scheme (see 2.4 above and 8.4 below), particularly now we have a larger executive team. We plan to organise informal meetings with groups of signatories from currently under-represented sectors such as law firms and the IP Bar, and to seek their views on opportunities for collaboration as well as for IP Inclusive to provide better tailored support. There are already signs of progress in both these areas: several law firms contributed funding during 2022, as did the IP Bar Association and a number of IP chambers, and we also met – at their instigation – with several law firm representatives regarding their involvement in the Charter. Law firms that are active in the IP sector have also been generous in hosting our events, particularly as we return to hybrid and in-person formats, whilst Clifford Chance funded a four-week intern for us in 2Q 2022 (see 9.4.2 below).

4.2 Paralegals and business support professionals

2022 brought us several collaborations with paralegal members of CIPA and CITMA, as well as with the business support professionals (for example HR and marketing professionals and practice managers) who work alongside CIPA and CITMA members. They included:

- Our mental wellbeing survey with Jonathan’s Voice (see 7.1.3 below), which was open to patent and trade mark paralegals and also, for the first time, to business support professionals in the sector. Created with input from members of these groups, it yielded valuable information about the issues affecting them. It also sought views on a potential IP Inclusive network or community for paralegals and business support professionals; the response was encouraging and can be used as a basis for our 2023 outreach initiatives.
- The senior leaders’ diversity think tank (4.3 below) and the Senior Leaders’ Pledge that it created (2.5 above), both of which have seen enthusiastic involvement from senior HR professionals and managers. They attended the June 2022 think tank meeting and made valuable contributions regarding the implementation and impact of the pledge and have helped with the follow-up through their participation in the “Pledge Prattle” forum.
- The *Inclusivity Unlocked!* programme (5.2 below). Many of the themes explored in this series of events have been of interest to managers and business support professionals, who have attended and in some cases contributed as speakers and/or organisers. The IP Practice Directors’ Group has been particularly helpful on this front, and following our collaboration

on an *Inclusivity Unlocked!* webinar about workspace design, our Lead Executive Officer Andrea Brewster has been invited to address its first meeting of 2023.

Andrea addressed CITMA paralegal members, at their conference in September 2022, about the importance of EDI, IP Inclusive's work and opportunities for involvement. Two members of our Advisory Board, Caelia Bryn-Jacobsen and Jodie Johnson, spoke on similar issues at CIPA's paralegals' conference dinner in October. Andrea also contributed an article to the September *CITMA Review* about involving all team members, not just attorneys, in IP Inclusive and in EDI more generally.

The committees of our six communities and four regional networks now include more paralegals and business support professionals. This is especially true of our most recently recruited IP & ME committee (see 6.2.2 below).

We hope to build on these collaborations in 2023 in order to widen involvement in IP Inclusive. In particular we are hoping to organise an event with and for IP paralegals, and if appropriate to create a support network to follow up on the issues raised. We will also continue to support Jonathan's Voice with their work on mental wellbeing for paralegals and business support professionals, including where appropriate with bespoke events.

4.3 The senior leaders' diversity think tank

Our senior leaders' diversity think tank was established in the autumn of 2020. Since then it has helped raise awareness of IP Inclusive's work and its value to our Charter signatory organisations, ensuring their engagement has the requisite authority and support. Although still focused on private sector patent and trade mark practices, it has helped us extend our reach to professionals in previously under-represented groups (for example business support professionals) as well as to its members' contacts both within and outside their sector. Importantly, since at present many in senior roles are not themselves members of "minority" groups, it has added significantly – in numbers and influence – to our community of EDI allies.

In 2021 the think tank created the IP Inclusive Senior Leaders' Pledge. Signature is open to anyone in a senior position within an IP sector organisation; this too is helping us reach more business support professionals and also (see 4.4.3 below) more in-house professionals.

2022 highlights for the think tank included:

- In February, a published commitment from its members to help improve awareness of, and access to, the IP professions, in particular through Careers in Ideas (see 3.4 above).
- In June, a plenary meeting to review the impact of the Senior Leaders' Pledge and to discuss improving take-up, support for signatories and the sharing of best practices. Attendees' senior HR and management colleagues also participated in these discussions.

- By way of follow-up, the establishment of the “Pledge Prattle” forum (2.5 above) for pledge signatories to exchange ideas and experiences and support one another’s EDI efforts.

We hope, in view of the February commitment and its preceding discussions, that think tank members will be actively involved in our 2023 *Summer of IP* outreach campaign (see 3.6 above).

A further plenary meeting had been planned for December 2022, in which the think tank was to hear from IP Federation representatives about in-house counsels’ EDI expectations. This unfortunately had to be postponed but is being rescheduled for early 2023.

The senior leaders’ think tank is a joint project with CIPA and CITMA, led by CIPA’s Honorary Secretary Gwilym Roberts and our Lead Executive Officer Andrea Brewster.

4.4 Other IP sector organisations

4.4.1 The importance of our founding organisations

However much we want to widen IP Inclusive’s reach, we are determined not to forget the cohort of supporters who have been with us since our inception and played such a key role in our development so far. Our founding organisations (CIPA, CITMA, the IP Federation and FICPI-UK) can help us engage not only patent and trade mark attorneys, but also the professionals who work with them in the IP sector.

Our relationships with these organisations remain close and productive. They are all represented on our Advisory Board, as is the IPO, one of our earliest Charter signatories. We are grateful to them for their continuing support, both financially and through involvement in specific projects.

4.4.2 CIPA and CITMA

In February 2022 our Lead Executive Officer Andrea Brewster met with CIPA’s relatively new D&I (Diversity and Inclusion) committee to discuss how we can support one another, and we have since worked together on, for example, our respective responses to IPReg’s regulatory review consultation (see 7.2.2 below) and the EPO’s eEQE consultation (7.2.3 below). Andrea contributes regular IP Inclusive updates to the *CIPA Journal*, and also this year an article for a dedicated EDI edition in June, in which she discussed IP Inclusive’s relationship with CIPA, its development over the years and its value to both organisations. She also writes regular articles for the *CITMA Review*.

IP Inclusive was represented at the annual CIPA and American Intellectual Property Law Association (AIPLA) diversity breakfast in June, in a panel discussion on the theme of “allyship” chaired by IP Ability co-lead Marianne Privett. We were also given the chance to address paralegal members of both CIPA and CITMA during the autumn: see 4.2 above.

As in 2021, both CIPA and CITMA have kindly opened their EDI- and wellbeing-related webinars, free of charge, to all IP Inclusive supporters. Those we promoted on our website events page during 2022

included CITMA webinars about trade mark careers (for National Careers Week), gender equality in the trade mark profession (for International Women’s Day), non-traditional families (for LGBT+ History Month) and managing workplace stress (for Mental Health Awareness Week), along with CIPA webinars about bullying and harassment in the workplace and (jointly with IP Ability: see 6.3.2 below) workplace adjustments.

We have scheduled a joint webinar with CIPA, through our Careers in Ideas campaign, for January 2023. Through IP Ability we hope to organise another, about online accessibility, later in the year.

The Informals, CIPA’s student body, have also been strong supporters of the IP Inclusive cause, participating in our events as both speakers and delegates, and helping to promote our work. We plan to collaborate during 2023 on discussions around the intersections between mental wellbeing, diversity and inclusion.

4.4.3 The IP Federation

During 2022 we worked with the IP Federation on a version of our Senior Leaders’ Pledge tailored specifically for in-house leaders: see 2.5 above. We are also still hoping to organise a joint event with the Federation on in-house professionals’ expectations of outside counsel on the EDI front. Its members have a great deal of EDI expertise that can help us promulgate best practices in the private sector, whilst at the same time allowing us to tailor our offering for in-house supporters.

4.4.4 Other

We have continued to collaborate with the IPO, its senior staff and its internal support networks, ensuring that IPO employees can also engage with IP Inclusive activities and events. The IPO team have been particularly helpful with Careers in Ideas projects, and their Deputy Director of Patents Ben Buchanan chaired our Advisory Board throughout 2022. We have also shared knowledge and experiences with IPO staff regarding mental wellbeing initiatives and EDI data gathering.

In December we received our first donation from the IP Bar Association; we are hoping to meet with them in 2023 to discuss closer collaboration.

In addition we continue to collaborate with the IP and legal sector mental health charities Jonathan’s Voice and LawCare: see 7.1.2 below.

We believe our relationships with these and other IP sector organisations are mutually beneficial, allowing us to learn from one another’s efforts in the EDI space and to raise awareness of our work among ever-widening audiences.

4.5 International collaborations

IP sector organisations outside the UK, in particular membership bodies, continue to show an interest in the IP Inclusive model. In early 2022 we learned that Australian and New Zealand IP attorneys, led by The Institute of Patent and Trade Mark Attorneys of Australia, were setting up an

EDI group along similar lines to ours. We were happy to agree to their request to use resources from our website, with appropriate acknowledgements, and in turn we look forward to the opportunity to learn from their experiences.

In 2Q 2022 we were invited to participate in the US-based Global IP Alliance¹⁷. Gwilym Roberts (co-leader of our senior leaders' think tank and CIPA Honorary Secretary) kindly agreed to act as an IP Inclusive representative and rapporteur in that group, EDI being a key part of its objectives.

IP Out generated interest overseas during 3Q 2022. In July, committee member Darren Smyth addressed a group of German IP professionals who were establishing an LGBTQ+ support network, and in August committee co-leads Isobel Barry and Tom Leonard were interviewed in an article published by the Intellectual Property Institute of Canada. See 6.6.3 below.

In April, Women in IP collaborated with the AIPLA on their global Women in IP networking events (see 6.7.4 below). Our involvement in *World IP Review's* autumn diversity issue (7.3 below) also took word of IP Inclusive to IP professionals far beyond the UK.

IP Inclusive supporters are still represented on the D&I working group established by the board of the Institute of Professional Representatives before the European Patent Office (epi). We will assist them wherever possible in promoting EDI to the epi Council and its wider membership.

4.6 Careers in Ideas

Our Careers in Ideas outreach campaign brings together participants from a range of different IP-related roles and career levels, united by their desire to make the whole sector more accessible. We are hopeful that its 2023 *Summer of IP* will increase that; several business support professionals are already involved and we also hope to organise events and activities with specific groups such as paralegals, IP solicitors and barristers and IPO staff, raising awareness of the roles they play in the IP sector and helping them access the longer-term benefits of involvement in IP Inclusive.

4.7 Menopause support

In 4Q 2022, as part of our *Inclusivity Unlocked!* programme, we began work on events and resources to improve menopause support and inclusivity in the IP professions. A group of interested individuals have together been planning a compilation of useful resources, a series of informal "coffee date" gatherings, discussion forums such as LinkedIn and WhatsApp groups, and more formal webinars on both organisational best practice and allyship.

This is a theme that unites people in all kinds of roles and working environments, not just those who are going through the menopause or perimenopause but also those who have done, will do in the

¹⁷ See <https://www.glipa.org/>

future and/or wish to support others who are doing so. It has the potential, therefore, to play a key part in our 2023 efforts to engage with a wider range of supporters. The activities and resources will be open to professionals of all genders and ages and in all IP sector roles.

4.8 Men in IP

We welcome male allies and our networks and communities (including Women in IP) are open to involvement from people of all genders. Women in IP's 2022 "coffee dates" (see 6.7.2 below) saw increasing levels of participation by male IP professionals. We are hopeful that our menopause-related work will also be of value to men who want to understand and support colleagues, friends and family members affected by the (peri)menopause.

Also important, we believe, is to address challenges that are unique to male IP professionals. In November 2022, to mark International Men's Day in the UK, we ran a joint webinar with Jonathan's Voice entitled "Why do men take their lives? – What we know and what we don't", which looked specifically at the reasons behind, and potential solutions to, male suicide rates: see 7.1.4 below.

It is worth pointing out that our senior leaders' think tank includes a large number of men, due to their historical over-representation among senior ranks in the IP professions. Their work is helping to reinforce our message that IP Inclusive is for everyone and that the involvement of allies is crucial for supporting under-represented groups.

4.9 General accessibility

Our events continue to be largely online or hybrid, and wherever appropriate recordings are made available afterwards. This helps us share information, guidance and resources with a wider range of people, regardless of their physical location, professional role, working arrangements or personal constraints. It also makes it easier for us to schedule and administer events and to capture the learning outcomes, which in turn allows us to provide more of them, on a wider range of themes, and better associated resources. Ironically it was not Covid-19 restrictions that limited face-to-face interactions in 2022, but the more current issue of rail strikes.

For most of our online events and larger meetings we provide automatic closed captions to improve accessibility. Our event recordings also carry YouTube's free automatic subtitles. Wherever possible, we and our co-hosts offer support to event delegates who have special access requirements.

Led by IP Out and in 2022 by Women in IP, our communities and networks have increasingly been moving towards "hybrid" events that allow both in-person and virtual attendance. This has required us to take special care to ensure that both groups of participants feel suitably welcome and included (for example during interactive Q&A sessions), but seems to have been largely successful.

In terms of opportunities for informal networking, relationship-building and mutual support, in-person events still appear to be favoured by most IP professionals. Some of our 2022 events, in particular those with a social rather than purely educational purpose, were solely in-person. This gradual change of emphasis will likely return the importance of our regional networks closer to its pre-Covid levels, as we seek to minimise our London-centricity. In January 2023 we will be working with these networks to provide more targeted support for people in specific regions, especially in the context of in-person and hybrid events.

5 Resources (strategic objective 4)

Developing the support and resources we provide and improving their accessibility.

5.1 General

IP Inclusive aims to provide cost-effective, accessible and appropriately-tailored training for IP professionals in EDI-related issues. Our resources include events (and associated materials such as recordings, speaker presentations and reports); knowledge exchange opportunities; guidelines, toolkits and template documents; directories; signposts to useful external resources; and social media content on relevant topics to spark further discussion. In addition, through Careers in Ideas, we provide resources to help IP professionals in their careers outreach work.

All of these are available free of charge to UK-based IP professionals. They can be accessed via our website resources page¹⁸ and/or relevant website event posts.

One of the high-level objectives in our 2022-23 business plan is to develop the support and resources we provide – both their content and their accessibility. 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-pandemic: this gave rise to *Inclusivity Unlocked!*, which we launched in September 2022 (see 5.2 below).

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 conditions, as well as in the mental health-focused events referred to below. Conversely, issues to do with post-Covid working arrangements are regularly visited in our events and resources on other topics such as mental wellbeing, support for disabled people and carers, and career development. Our Scotland Network ran a May event with Women in IP that looked specifically at the return to the office and hybrid working.

¹⁸ See <https://ipinclusive.org.uk/resources/>

Respondents to our 2022 impact survey valued our events and other resources highly. One commented that they had “opened my eyes to other areas of D&I which have no direct impact on me but where I have scope to learn and become an ally”; one that “IP Inclusive events, contents and... resources are good starting points for conversations and also generate conversations”; and another that involvement in IP Inclusive had challenged them to consider their own unconscious biases to become a more inclusive colleague. These are exactly the goals that we set out to achieve through our work. 76% of individual and 93% of Charter signatory respondents were keen for us to continue providing our free EDI resources. An attendee at a meeting of our senior leaders’ think tank remarked that “IP Inclusive is my go-to place to find EDI content.”

5.2 *Inclusivity Unlocked!*

Our supporters are still building back after the 2020 and 2021 Covid-19 lockdowns. They are also using the opportunity to think more broadly about their workspaces and their employees’ working patterns (for example in terms of locations, timings and IT platforms). We continue to help them put inclusivity at the heart of this rebuilding process, and to ensure that new “hybrid” arrangements do not disadvantage or exclude any particular groups.

Inclusivity Unlocked! is a programme of events and associated resources to support organisations as they emerge from the pandemic. Events covering a range of themes, largely if not entirely online, are being used to generate practical tips for an ongoing compilation. They include input from experts within the IP Inclusive community as well as from external sources where appropriate. We expect the programme, which launched in September 2022, to last about six months.

Our first *Inclusivity Unlocked!* 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. This was a popular and thought-provoking start to the programme. The full event listing for 2022 was:

- In September, the two “Leaving no one behind” webinars.
- In 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.
- In November, “Harnessing hybrid” – a webinar with Smart Working Revolution about building efficient and inclusive hybrid working models.
- Also in 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.

Events already set up for 1Q 2023 will focus on inclusive workspace design, business development in the post-Covid world, and menopause support. We also hope to organise more 2023 webinars, with the help of Jonathan’s Voice and LawCare, about the mental health impact of new working arrangements.

The full *Inclusivity Unlocked!* programme – which includes both past and future events, together with links to associated resources such as event recordings and reports – is available on our website resources page and updated on a rolling basis. In November 2022 we also published an initial compilation of “top tips”, distilled from the events thus far and presented as easily-digested slides for organisations, individual IP professionals, managers and in one case specifically small businesses. This compilation is also on the resources page and regularly updated.

We have a survey for supporters to suggest additional event topics and formats. Open since August 2022, this has provided valuable ideas for the programme, and reassured us that the work done so far is helpful and appropriate.

One of our 2021-22 objectives was to support IP professionals and their organisations as they began to emerge from the Covid-19 lockdowns, “to help ensure that D&I and wellbeing are appropriately addressed in the new working arrangements and that positive aspects of the 2020 changes can be retained.” *Inclusivity Unlocked!* builds on this, focusing relevant resources and guidance – including those available elsewhere – in a single, more accessible, programme. Through it we can continue to support the people who make management and strategic decisions in our sector, helping them to safeguard inclusivity throughout the necessary changes to their working environments.

Inclusivity Unlocked! was initially led by our intern Susan Nelson. She handed over the role to our Executive Support Helen Smith at the end of October 2022.

5.3 IP Inclusive events

Our events allow us to raise awareness and increase understanding of EDI-related issues, and provide a forum for people within the IP sector to share experiences and best practices. They continue to be open to all our UK-based supporters, free of charge, being largely developed and hosted by volunteers. As in previous years, experts from both within and outside the IP professions have been kind enough to contribute their time and expertise for free, which has been vital to our avoidance of a “paywall”. It has also helped foster a sense of involvement in the IP Inclusive cause, as well as creating networking, business development and PR opportunities for speakers, hosts and delegates alike.

Many of the events yield follow-up resources, including speaker presentations and supplementary materials, recordings, guidance notes and discussion outcomes. These are available, also free of charge, on our website and increase the accessibility and longer-term value of the events they derive from.

IPReg’s continuing professional development (CPD) guidelines continue to recognise the CPD content of our training events for patent and trade mark attorneys¹⁹.

¹⁹ See IPReg’s guidance on CPD activities at <https://ipreg.org.uk/pro/cpd/cpd-activities>

In total we posted 37 events for 2022 on our website events page²⁰. Most of these were organised through our communities (15), regional networks (3) and Careers in Ideas task force (1) and as such are discussed elsewhere in this report, as are the 5 in our *Inclusivity Unlocked!* series and our 2022 annual meeting. Often our communities and networks run joint events, recognising the intersectionality between various under-represented groups; during 2022 there were 7 such events.

We organise some of our events in partnership with other organisations such as CIPA, Focal Point Training, Illuminate VR, Jonathan’s Voice, LawCare and the IPO (2022 saw 8 such collaborations, of which 5 involved Jonathan’s Voice: see 7.1.4 below), as well as with generous hosts from among our Charter signatories.

During 2022 our events page also listed one AIPLA, 2 CIPA and 4 CITMA events, all of which were open, free of charge, to IP Inclusive supporters. Meetings of our senior leaders’ think tank were not posted on the website; nor were the related “Pledge Prattle” sessions.

Perhaps inevitably, event “no-show” rates have increased during 2021 and 2022 – it is easy to register for an online event and equally easy not to attend, particularly in the context of a “non-core” topic such as EDI. IP professionals’ working routines have also changed since the pandemic, with perhaps less certainty as to location and timing and less “spare time” than during the 2020 lockdowns. These issues were further complicated in 2022 by rail strikes, which compromised travel plans. We factor all of this into our event planning and registration systems and most events have still been better attended than they would have been pre-Covid.

Our 2022 impact survey revealed huge levels of support for our events. Respondents felt they were having a positive impact in the IP professions, that they were educational and informative and that they increased awareness and understanding of a wide range of EDI issues. Many also valued the networking opportunities afforded by the events, which can in turn help with business development and enhance working relationships as well as providing more personal support and social interactions. One survey respondent commented that they had made “genuine friendships” through IP Inclusive. Another said that they “like to attend the events and then try and use the learnings for D&I initiatives I’m involved in.”

62% of the individual survey respondents were keen for IP Inclusive to continue to provide sector-wide networking and business development opportunities. 82% of the Charter signatory respondents wanted us to continue to provide training.

5.4 Other 2022 resources

Our website resources page saw plenty of additions during 2022, expanding and enriching the content available to help our supporters with their EDI work. We posted 19 new items: these

²⁰ See <https://ipinclusive.org.uk/events/>

included 14 event recordings and/or associated materials such as speaker presentations; Careers in Ideas videos created for National Careers Week; and resource compilations for *Inclusivity Unlocked!*.

In February, our Women in IP community published its collection of “Quick wins for Charter signatories”, which is also available on our resources page: see 6.7.3 below.

During the year a small group (largely from the IP & ME committee) worked on creating AskME, a directory of speakers, content contributors and other volunteers from minority ethnic backgrounds. See 6.2.4 below. We hope this will prove a valuable resource for improving the visibility and influence of minority ethnic professionals in the IP sector.

On our website News and Features page²¹, we published posts covering a wide range of topics including IP Inclusive news, resources and event reports; comment and opinion; and features containing relevant information and updates. The 12 event reports summarised guidance and insights shared by participants; they embraced events on mental wellbeing, *Inclusivity Unlocked!* webinars and (see 6.7.2 below) Women in IP’s coffee dates and discussions on the “authority gap”.

Other 2022 News and Features posts:

- Signposted sources of help about accessibility, reasonable adjustments, menopause inclusivity and hybrid working.
- Shared ideas on organisational mental health (including mental health first aid) policies, on working arrangements to reduce mental health problems, and on improving your individual mental wellbeing.
- Flagged the results of an external survey on banter in the workplace.
- Provided reading suggestions to mark South Asian Heritage Month in the summer.
- Discussed topics including progress towards LGBTQ+ inclusion, workplace alcohol culture, age-related diversity issues and inclusive recruitment processes for people with dyslexia.
- Offered personal reflections and experiences from IP professionals with ADHD, autism and multiple sclerosis, as well as on loneliness in the IP professions and on breastfeeding provision at European Patent Office (EPO) hearings.
- Reported on IP Inclusive initiatives such as our mental wellbeing survey, our consultation responses, *Inclusivity Unlocked!* and the *2023 Summer of IP*.
- Publicised our 2021 Annual Report; our 2021-22 impact report; our 2022-23 business plan; and news from our communities, our governing body IPIM, our executive team and our senior leaders’ think tank. Our 2022 intern Susan Nelson also contributed two blog posts reflecting on her time with IP Inclusive.

We also published the following guest posts:

- Personal thoughts on anxiety and depression, to mark Time to Talk Day in February.

²¹ See <https://ipinclusive.org.uk/newsandfeatures/>

- A three-part series from Emphasis HR & Training covering part-time working, religious bank holidays and gender identity inclusion.
- A report from The World Intellectual Property Organization (WIPO) and Invent Together about their campaign to raise awareness of the IP diversity gap across regions.
- Tips for making disabled people feel included, comfortable and welcome at work.
- An update from the charity In2scienceUK on their work with the IP professions (see 3.5 above).
- Comments on both Pride Month and Black History Month, offering practical measures to continue supporting the respective communities.

Many of the News and Features posts were contributed voluntarily by, or sourced by, our supporters. However, having an executive team to help generate content and capture event outcomes has made it easier for us to publish prompt and targeted resources: see 9.4 below.

Further resources are available from our website Mental Health and Wellbeing page (which Jonathan’s Voice will be helping us update in 2023), and from specific community pages (for example the disability-related resources collated by IP Ability: see 6.3.3 below).

5.5 Resource coordination and accessibility

New events and resources are flagged in our fortnightly update newsletters. Supporters can also subscribe to notifications of new News and Features posts. Where feasible, we also collate and publish ideas, best practices and resources available from relevant external organisations – with the help of our Advisory Board, communities, regional networks, Careers in Ideas task force and Mental Health First Aiders’ Network. We also work with IP sector membership bodies to disseminate our resources more widely. However, we recognise there is still room to improve the accessibility and uptake of our resources among IP professionals.

Our intern and other executive team members have helped us to post more about our work on LinkedIn and to provide additional newsletter content and better-targeted event reminders. In October 2022 we altered our website events page to allow visitors to search separately for events or “awareness dates” (for example Black History Month); previously these were all displayed on the same calendar and with increasing numbers of EDI-related awareness dates this often obscured information about IP Inclusive events.

In 2023, if we have access to additional intern support, we hope to create a cross-referenced directory of our resources and events – including event reports and relevant News and Features posts – to help users identify, by topic, the content they need. This will include guidance for locating and filtering the materials already available on the website.

We hope that these measures, in parallel with our efforts to widen engagement (see 4 above), will improve awareness of, and access to, our growing range of resources.

6 The six communities

6.1 General

We currently have six networking and support communities²². Each organises its own social, training and awareness-raising events, and communicates relevant issues and resources via its own communication channels and the IP Inclusive website.

Our communities provide safe spaces for their members to share experiences and seek guidance and support from one another, as well as a focus for those wishing to act as “allies” to the relevant groups, who are welcome to become members. They are valuable ambassadors for the IP Inclusive cause, both within the IP sector and in their relationships with counterpart groups elsewhere.

The communities collaborate with one another and with the regional networks, in particular on events. All six were involved in our May 2022 “Mental health & intersectionality” webinar (see 7.1.4 below) and in our two-part “Leaving no one behind” webinar which opened the *Inclusivity Unlocked!* programme (5.2 above).

Following discussions at our annual meeting in April, a small group began discussing a possible new community for IP professionals who have retired, are approaching retirement or are otherwise considering winding down their work. 2023 may yet bring us a seventh community.

Our 2022 impact survey demonstrated the value that IP professionals associate with our communities, in terms of the sense of belonging and support they provide as well as the opportunity to network with like-minded people. 94% of the individual respondents were keen for IP Inclusive to continue providing access to support networks. As part of the online content we posted during Pride Month in June, one IP Out committee member commented that the community “gives a wonderful opportunity a few times a year not to be in the minority”.

6.2 IP & ME

6.2.1 General

IP & ME²³ is our community for IP professionals from minority ethnic backgrounds, and their allies.

At the start of 2023 it had 478 subscribers to its mailing list, 414 followers on Twitter (@ipinclusiveIPME) and 125 members in its LinkedIn group (these figures at the start of 2022 were

²² See <https://ipinclusive.org.uk/community/>

²³ See <https://ipinclusive.org.uk/community/ip-me/>

430, 420 and 99 respectively), as well as 204 followers and 500+ connections for its LinkedIn profile page.

6.2.2 Committee restructuring

For IP & ME the most significant aspect of 2022 was the restructuring and revitalisation of its committee. During 1Q 2022 Cass Dottridge, Josh McLennon and Monifa Phillips were appointed as the new co-leads; during 2Q 2022 they recruited over 20 new committee members and established four working groups focused on internal communications, external communications, events and “empowerment”. These have since been liaising with one another, with other communities, with the IP Inclusive executive team and with relevant external groups (for example their counterpart network at the IPO) over plans for activities, events, resources and social media content.

6.2.3 Events

The new IP & ME committee organised or co-organised the following events during the second half of 2022:

- In October, to mark Black History Month, a dinner and get-together for supporters in the Manchester region.
- In December, an online “coffee morning”, offering a chance for committee members and their allies to chat informally about IP & ME’s future role.
- Also in December, a Hanukkah/Chanukah/Christmas get-together with our Midlands Network at the Oxford Christmas market.

IP & ME was represented by committee co-lead Josh McLennon in our May webinar on mental health and intersectionality and our September *Inclusivity Unlocked!* webinars “Leaving no one behind”. Josh also represented IP & ME, alongside Advisory Board member Saiful Khan, on the panel of an internal IPO seminar entitled “Who Am I?” in October.

6.2.4 The IP Inclusive AskME directory

Work continued throughout 2022 on the “AskME” directory, intended to improve the visibility of minority ethnic professionals in the IP sector. This resource, hosted on the IP Inclusive website, will allow “customers” such as publishers, editors and event organisers to search, for free, an online list of IP professionals from minority ethnic backgrounds who are willing to speak at events, provide content, contribute to committees, mentor others or act as examiners for professional exams.

Unfortunately the development of AskME’s online functionality was held up during 1Q 2022 due to staffing issues in the supplier’s team. More progress was made during 2Q 2022 and in 3Q 2022 the new website pages were signed off, but lack of volunteer time then delayed the testing phase and launch. A “soft” launch was initiated during 4Q 2022 and we are currently sourcing an initial cohort of directory entries prior to allowing customer access.

In 1Q 2022, IP & ME committee and IP Inclusive Advisory Board member Abdulmalik Lawal kindly provided *pro bono* advice on trade mark clearance for the directory title.

6.2.5 Other 2022 highlights

In April, the new committee co-leads created a short introductory video to attract and welcome new IP & ME members; this was published on the IP & ME website page.

3Q 2022 saw the community's LinkedIn page re-activated with a series of posts from new committee members. The committee also sourced posts for our website News and Features page: two in July and August to mark South Asian Heritage Month, and one in December about "keeping the conversation going" beyond October's Black History Month. The IP & ME Twitter account was also rebranded to move away from the acronym BAME.

In October 2022, IP & ME committee member Daniyal Khan and former committee member Tibor Gold, alongside Advisory Board member Saiful Khan, contributed to a *World IP Review* article about religious (in)tolerance; this formed part of the annual EDI-focused publication *WIPR Diversity*.

6.2.6 Key contacts

The current IP & ME committee members and their working groups are:

- Internal communications: Emily Bevan-Smith (Appleyard Lees); Promilla Caughey (IPO); Anne-Marie Diaz del Castillo (Carpmaels & Ransford); Theodore Jemmott (HGF); Nessa Khandaker (Kirkland & Ellis International, group lead); Nirmal Trivedy (Stobbs); Tanzilla Virmani (Appleyard Lees).
- External communications: Joanna Danquah (Stobbs); Melis Engin (Einhell); Shobana Iyer (Swan Chambers); Vinay Iyer (HGF); Daniyal Khan (Marks & Clerk); Beatrice Malacart (Forresters, group lead); Kate Selwyn (Forresters).
- Events: Olivia Buckingham (Reddie & Grose); Promilla Caughey; Elida Dode (Queen Mary University of London); Melis Engin; Daniel Hurst (Dehns); Sophia Karim (D Young & Co); Nessa Khandaker; Abdulmalik Lawal (Franks & Co); Michael Lindsey (Geldards); Joanne Pham (Reddie & Grose); Cherry Shin (HGF, formerly Appleyard Lees); Ji-Young Song (HGF); Alexandra Wood (Forresters, group lead).
- Empowerment: Victoria Akintola (Manton Legal Consultancy); Joanna Danquah (group lead); Anne-Marie Diaz del Castillo; Vinay Iyer; Krishna Kakkaiyadi (Pinsent Masons); Sophia Karim; Maranatha Kifle; Parjeet Tawana (BenevolentAI).

The committee leads are Cass Dottridge (Cargill), Josh McLennon (Kilburn & Strode) and Monifa Phillips (Appleyard Lees).

The AskME project is being run by Krishna Kakkaiyadi and Josh McLennon from the IP & ME committee and Jay Janusz (Dehns) from the Careers in Ideas task force, with assistance from our Lead Executive Officer Andrea Brewster.

6.3 IP Ability

6.3.1 General

IP Ability²⁴ is our community for IP professionals who are disabled (including neurodivergent) or carers, as well as their allies. Its work embraces disabilities and long-term health conditions of all kinds, be they mental or physical, visible or invisible, permanent or temporary, sudden onset or progressive.

Its committee includes working groups focused on specific topics: neurodiversity; exam accessibility; invisible/concealed disabilities; physical disabilities; long-term health conditions; carers and caring responsibilities; mental health; and workplace adjustments.

At the start of 2023, IP Ability had 104 subscribers to its mailing list, 278 followers on Twitter (@IP_Ability), 116 members in its LinkedIn group and 14 members in its Facebook group (these figures at the start of 2022 were 81, 272, 91 and 14 respectively).

6.3.2 Events

IP Ability's 2022 events were:

- In June, a joint webinar with CIPA on workplace adjustments and the implications of the Equality Act 2010 for disabled employees.
- In July, a webinar for Disability Pride Month, in which panellists discussed their experiences as disabled professionals in the legal sector.

IP Ability was also represented by committee members Rebecca (Becky) Campbell in our May webinar on mental health and intersectionality and Megan Rannard in our September *Inclusivity Unlocked!* webinars "Leaving no one behind". Its committee co-lead Marianne Privett represented IP Inclusive at the annual CIPA and AIPLA diversity breakfast in June, where she chaired a panel discussion on allyship.

6.3.3 Resources and awareness-raising

IP Ability continued to raise awareness and educate in other ways, by creating content for both the IP Inclusive website and external publications.

Its contributions to the IP Inclusive website News and Features page included:

- In April and May, three posts by committee member Debra Smith for Multiple Sclerosis (MS) Awareness Week and World MS Day.
- In July, a guest post it sourced for us on general workplace inclusivity for disabled people.
- In October, a post about fairer recruitment processes for people with dyslexia.

²⁴ See <https://ipinclusive.org.uk/community/ip-ability/>

- In November, a series of three posts by new committee member Sophia Karim about her personal experiences of living with ADHD and how the neurodivergent brain can be an asset in the legal sector.
- In July and December, updates about its lobbying work on the proposed new EQEs (see 6.3.4 below).

Its contributions to external publications included:

- In March, an article by committee member Becky Campbell, published in *World IP Review* to mark Neurodiversity Celebration Week. The article, in which Becky outlined the challenges faced by neurodivergent IP lawyers and how she has learned to deal with them, was also published on the IP Inclusive News and Features page.
- Contributions by committee members Jonathan Andrews, Becky Campbell and Carolyn Pepper to an article in *World IP Review's* October *WIPR Diversity* publication, again about the challenges facing neurodivergent professionals.

In both May and October 2022 IP Ability updated its compilation of links and sources to help the IP professions become more disability-confident²⁵. This includes tools and resources for employers, employees and aspiring IP professionals, highlighting some that relate to specific aspects of disability, neurodiversity, health and caring.

6.3.4 Lobbying and influence

IP Ability has continued to lobby for greater accessibility in the European Qualifying Exams (EQEs). In July 2022 it 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 IP²⁶. The submissions discussed in particular the needs of disabled candidates, parents and carers and the availability of reasonable adjustments.

We were subsequently delighted to see, in the EPO's November 2022 analysis of the feedback they received, several mentions of the need to improve exam accessibility²⁷. They included direct references to IP Inclusive's submissions, promised "follow-up on diversity and inclusion and digital examination (notably with regard to visual impairment, disability and work-life balance)" and commented that "When it comes to disability, while possibilities provided by the online examination platform were welcomed (customising font sizes, enablement of some assistive technologies), more work will be done on enabling assistive technologies and paying due attention to inclusive actions when amending the EQE legal setting." We will continue to engage with the EPO's consultation processes as the new exams are developed, to ensure these issues are not forgotten.

The IP Ability committee has also continued to help individual IP professionals with concerns about access and reasonable adjustments, in particular in professional qualification and assessment

²⁵ See <https://ipinclusive.org.uk/resources/disability-confidence/>

²⁶ See <https://ipinclusive.org.uk/newsandfeatures/ip-inclusive-submissions-on-proposed-new-eqes/>

²⁷ See <https://ipinclusive.org.uk/newsandfeatures/inclusivity-accessibility-in-the-proposed-new-eqes-update/>

systems, tribunals and administrative processes. For these people it is able to signpost sources of guidance and broker helpful connections.

6.3.5 Other 2022 highlights

IP Ability committee co-lead Chris Clarke was included in *World IP Review's* 2022 “Diversity Champions in IP” list, published in its *WIPR Diversity* issue in October. His co-lead Marianne Privett was also mentioned in the listing. In the same publication committee member Becky Campbell was included in the 2022 “Trailblazers” list.

In December 2022, to mark International Day of Persons with Disabilities, IP Ability launched an update of its 2019 inaugural survey. Its aim is to explore how things have changed in the IP sector for disabled people and carers, and what further support the community can provide. In 2019 a relatively low proportion of the disabled and carer respondents said they had felt able – for various reasons, including fear of discrimination or stigma – to tell their employer about their disabilities or caring responsibilities. Responses also indicated that workplace support was sometimes less helpful than it could be, and that disabled people and carers did not always feel properly included at work. We await with interest the results of the 2022-23 survey, particularly in view of the intervening Covid-19 pandemic.

As in 2019, the new survey is open to all UK-based IP professionals, whether or not disabled/neurodivergent or carers. It closes in mid-January 2023.

6.3.6 Key contacts

The current IP Ability committee members are Jonathan Andrews (Reed Smith); Victoria Barker (Finnegan); Fran Bleach (CIPA); Caelia Bryn-Jacobsen (Kilburn & Strode); Becky Campbell (Mewburn Ellis); Gemma Christie (Keltie); Chris Clarke (Vectura); Nicholas Fischer (Marks & Clerk); Karen Genuardi (AA Thornton); Stephanie Jackson (HGF); Sophia Karim (D Young & Co); Rob Knight (Cummins); Beth Marshall (Murgitroyd); Carolyn Pepper (Reed Smith); Marianne Privett (AA Thornton); Megan Rannard (Marks & Clerk); Michael Reynolds (D Young & Co); Francesca Rivers (Cancer Research Technology); Kerry Russell (Shakespeare Martineau); Debra Smith (Mayfin IP); and Alex Vowinckel (CMS Cameron McKenna Nabarro Olswang).

The committee leads are Chris Clarke and Marianne Privett.

6.4 IP Futures

6.4.1 General

IP Futures²⁸ is our community for early-career IP professionals. We define “early-career” loosely as meaning the first 5 or 6 years or so in the IP professions.

²⁸ See <https://ipinclusive.org.uk/community/ip-futures/>

At the start of 2023, IP Futures had 172 subscribers to its mailing list and 118 members in its LinkedIn group (these figures at the start of 2022 were 152 and 118 respectively). It also had 336 connections through its LinkedIn profile page (301 at the start of 2022), with 438 followers.

6.4.2 2022 highlights

During 2022 the IP Futures committee continued to organise events, both online and in-person, to support and inspire more junior members of the IP professions. Its members were also involved in the work of the Careers in Ideas task force.

Its events were:

- In March, in collaboration with Careers in Ideas, an online “careers clinic” for National Careers Week (see 3.3 above).
- Also in March, episode 3 in the “What I’d tell my younger self” series: an online discussion with Robert Andrews, Chief Inclusion and Diversity Officer at Mewburn Ellis.
- In May, an in-person panel discussion and networking event hosted by Finnegan Europe in London, on “Navigating your career in IP”; this event was open to would-be recruits as well as early-career IP professionals.

IP Futures was also represented by Giovanna Viganò in our May webinar on mental health and intersectionality and by Sanam Habib in our September *Inclusivity Unlocked!* webinars “Leaving no one behind”.

It has already organised its first event for 2023, a hybrid panel discussion on the transition from trainee to qualified professional, which will take place in London and online at the start of February.

Another 2022 highlight for IP Futures was the inclusion of its then committee lead Rachel Bell in *World IP Review’s* 2022 “Trailblazers” list, published in *WIPR Diversity* in October.

6.4.3 Key contacts

The current IP Futures committee members are Kritika Chhokra (BAT); David Ewing (BAE Systems); Sanam Habib (HGF); Thomas Hailes (Beck Greener); Monifa Phillips (Appleyard Lees); Fionnuala Richardson (Finnegan); Mehreen Sattar (HGF); Eilidh Smith (Pinsent Masons); and Giovanna Verganò (Cleveland Scott York).

Rachel Bell (GSK) was the committee lead until 4Q 2022 and was succeeded by Sanam Habib. Rachel stepped down to take maternity leave; we wish her well and thank her for the enormous amounts of work she has put into establishing and running IP Futures since 2019.

6.5 IP Non-traditional Family Network

6.5.1 General

The IP Non-traditional Family Network²⁹ is for IP professionals in solo parent, blended, adoptive, LGBTQ+ and other non-traditional families, as well as their allies.

It has its own LinkedIn group and blogsite³⁰. At the start of 2023, it had 63 members in its LinkedIn group (52 at the start of 2022).

6.5.2 2022 highlights

The IP Non-traditional Family Network ran three events in 2022:

- In March, “Challenging the narrative”, an online discussion on the strengths brought by non-traditional families to the workplace.
- Also in March, a joint event with IP Out that again addressed issues for non-traditional families (see 6.6.2 below).
- In December, a joint “coffee date” with Women in IP on the theme of “Work and family” (see 6.7.2 below).

The network was represented by Sandra Pelling in our May webinar on mental health and intersectionality, and by Janine Swarbrick in our September *Inclusivity Unlocked!* webinars “Leaving no one behind”. Its work was also mentioned in a CITMA webinar about non-traditional families to mark LGBT+ History Month in February.

In July its committee provided input into IP Inclusive’s response to the EPO EQE consultation, led by IP Ability: see 6.3.4 above.

6.5.3 Key contacts

The current IP Non-traditional Family Network committee co-leads are Sarah Phillips and Julian Crump (Abel + Imray), and Janine Swarbrick (HGF).

6.6 IP Out

6.6.1 General

IP Out³¹ is our community for LGBTQ+ IP professionals and their allies.

At the start of 2023 its LinkedIn group, “IP Out Network”, had 182 members. It had 318 followers on Twitter (@ip_out) and 600 subscribers to its mailing list. (These figures at the start of 2022 were 156, 309 and 559 respectively.)

²⁹ See <https://ipinclusive.org.uk/community/ip-non-traditional-family-network/>

³⁰ See <https://nontraditionalfamilies.blog/>

³¹ See <https://ipinclusive.org.uk/community/ip-out/>

6.6.2 Events

IP Out ran the usual mixture of educational and social events during 2022. All were either in-person or hybrid. They included:

- In March, a hybrid panel discussion on “Modern families: routes and obstacles to parenthood”.
 - This joint project with the IP Non-traditional Family Network covered non-traditional families, the routes to parenthood for LGBTQ+ people and related legal challenges, as well as panellists’ personal experiences. It was hosted by Carpmaels & Ransford in London and online.
- In July, a 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*.
- In September, a joint social event in Birmingham, with our Midlands Network, to mark Birmingham Pride.
- In November, a hybrid event on “Queer identities and faith experiences”.
 - Hosted by Allen & Overy in London and online, this was IP Out’s second event to look at the experiences of LGBTQ+ people in the context of religion, the first being in June 2021. The speakers covered a range of faiths, from Christianity to paganism, and the spaces they can provide for people who identify as LGBTQ+.

IP Out was also represented by committee members Darren Smyth in our May webinar on mental health and intersectionality and Kevin Rich in our September *Inclusivity Unlocked!* webinars “Leaving no one behind”.

6.6.3 Other 2022 highlights

During the year IP Out committee members did plenty to raise awareness of the community’s work and of LGBTQ+ issues more generally.

In June, to mark Pride Month, they sourced two guest posts for our website News and Features page and also contributed to our mini-series of quotes on Twitter about the value of involvement in IP Out. In July, Darren Smyth addressed a group of German IP professionals who were establishing their own IP-focused LGBTQ+ support network and wanted to hear about the IP Out/IP Inclusive model; his talk was later reproduced in a website News and Features post. Darren also contributed to an article, “Striving for authenticity”, in *World IP Review’s* EDI-focused publication *WIPR Diversity* in October.

Committee co-chairs Isobel Barry and Tom Leonard created a short introductory video to attract and welcome new IP Out members, which we published in April on the IP Out website page. They were also interviewed about IP Out in an article to celebrate Pride season published by the *Intellectual Property Institute of Canada* in August. Isobel was herself listed in the *WIPR Diversity 2022* list of “Influential Women in IP”.

In August IP Out received a £720 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.

6.6.4 Key contacts

The current IP Out committee members are Isobel Barry (Carpmaels & Ransford; LinkedIn co-director); Becky Campbell (Mewburn Ellis; IP Ability liaison); Triona Desmond (Pinsent Masons; LinkedIn co-director); Georgina Hart (Wiggin LLP; co-secretary); Tom Leonard (Kilburn & Strode; co-chair); Jonny Lerwill (Airbus Defence & Space; communications co-director); Robin de Meyere (Hoffmann Eitle; communications co-director); Kevin Rich (Potter Clarkson; co-secretary); Eden Sarid (Essex Law School; email director and Twitter director); Al Skilton (IPO); and Darren Smyth (EIP; co-chair and IP Inclusive liaison).

The committee co-chairs are Tom Leonard and Darren Smyth. Darren succeeded Isobel Barry when committee roles changed at the end of 2022.

6.7 Women in IP

6.7.1 General

Women in IP³² is our community focussing on issues that can predominantly affect women in the IP professions. It is open to people of all genders, as are its events.

At the start of 2023 it had 1,016 subscribers to its mailing list, 655 followers on Twitter (@WomeninIP) and 1,679 members in its LinkedIn group, compared to 987, 616 and 1,396 respectively at the start of 2022.

6.7.2 Events

Several of Women in IP's 2022 events were based on the concept of the "authority gap" for women and other under-represented groups, as discussed in Mary Ann Sieghart's book *The Authority Gap: Why women are still taken less seriously than men, and what we can do about it*³³. It was a topic that allowed the community to work with allies of all genders, and to weave in the impact of intersectionality on the way a person is treated both in the workplace and beyond.

Its coffee dates also continued to bring supporters together for informal discussions on important gender-related themes. Having established the programme and run many successful events, including through the Covid-19 lockdowns, Isobel Barry and Emily Teesdale handed over the reins to Michelle Montgomery and Wendy Peet in mid-2022. Michelle and Wendy went on to organise the September and December coffee dates and are now planning more, including in collaboration with other IP Inclusive communities.

³² See <https://ipinclusive.org.uk/community/women-in-ip/>

³³ See <https://www.penguin.co.uk/books/112/1120787/the-authority-gap/9781784165888.html>

Women in IP's 2022 events were:

- In February, an online coffee date about “invisible labour” (“office housework”) in the workplace and its impact in particular on women; this was held as a single event with breakout rooms for better networking and discussion opportunities.
- In May, a book club-style coffee date (again online) discussing *The Authority Gap*, as a precursor to the annual event in June.
- Also in May, a breakfast event in association with our Scotland Network about the return to work and hybrid working (see 2.3 above).
- In June, its annual panel event, “Mind the Gap!”
 - The theme for this event was again the authority gap and the issues it raises for women and other under-represented groups. Allyship was an important aspect of the discussions and the panel featured both women and men. Hosted by Gowling WLG, it was originally intended as a hybrid event but had to be rescheduled, due to rail strikes, as online only.
- In September, an online coffee date with discussions, hosted by several individual volunteers, about gender balance in performance reviews.
- In October, a follow-up to the June annual event, in which some of the original panellists returned to explore the authority gap theme in more detail.
 - This one was successfully run as a hybrid event, in London and online, to make up for cancellation of the in-person part of the June event. It too was hosted by Gowling WLG.
- In December, an online coffee date run jointly with the IP Non-traditional Family Network, with discussions addressing the theme of “Work and family” from a range of perspectives.

Women in IP was also represented by committee co-lead Susi Fish in our May webinar on mental health and intersectionality and by committee member Lucy Samuels in our September *Inclusivity Unlocked!* webinars “Leaving no one behind”.

6.7.3 Resources

The outcomes of Women in IP's coffee date discussions are summarised and shared with the wider IP Inclusive community through our website News and Features page, as were the key discussion points from the June and October 2022 “Mind the Gap!” events.

In February 2022, the community published its collection of “Quick wins” to help our Charter signatories improve EDI in their organisations³⁴. These collated suggestions were based on discussions at its 2021 annual event, its follow-up coffee dates and an associated survey seeking delegates’ ideas for effective EDI-improving measures. They are available on our website resources page.

³⁴ See <https://ipinclusive.org.uk/resources/quick-wins-for-charter-signatories/>

Women in IP also distributes an occasional e-newsletter to its mailing list subscribers, flagging relevant events, resources and comment; there is an archive of these newsletters on its website page³⁵.

6.7.4 Other 2022 highlights

Other 2022 achievements for the Women in IP community included:

- In March, a social media campaign for International Women’s Day: photos and quotes on the #BreaktheBias theme were published on LinkedIn and Twitter.
- In April, a collaboration with AIPLA to publicise their global “Women in IP networking events”. These included in-person gatherings hosted with the help of committee members in both London and Manchester; the theme, to mark World Health Day on the same date, was “Being happy and healthy in our work”.
- In July, the provision of input into IP Inclusive’s response to the EPO EQE consultation, led by IP Ability: see 6.3.4 above.
- In October, the inclusion of former committee member Isobel Barry in the *WIPR Diversity* 2022 list of “Influential Women in IP”.
- Throughout the year, six website News and Features posts, including reports of the December 2021 and February 2022 coffee dates, the June annual event and the October follow-up; the experiences of a breastfeeding patent attorney at the EPO; and menopause inclusivity.

6.7.5 Key contacts

The current Women in IP committee members are Andrea Brewster (IP Inclusive); Megan Briggs (Burness Paull); Lucy Coe (Mewburn Ellis); Joanna Conway (Deloitte); Triona Desmond (Pinsent Masons); Susi Fish (Boult Wade Tennant); Barbara Fleck (Appleyard Lees); Catherine French (Sacco Mann, North of England representative); Michelle Montgomery (Carpmaels & Ransford); Yelena Morozova (Finnegan Europe); Wendy Peet (Procter & Gamble); Sabine Rehaber (Mathys & Squire); Lucy Samuels (Gill Jennings & Every); Tara Sarwal (Haleon); and Emily Teesdale (Airbus).

The committee leads are Joanna Conway and Susi Fish.

Isobel Barry (Carpmaels & Ransford) stepped down from the committee in July 2022. Michelle Montgomery joined in July and Sabine Rehaber in November.

³⁵ See <https://ipinclusive.org.uk/newsandfeatures/women-in-ip-newsletter-archive/>

7 Other activities

7.1 Mental health and wellbeing

7.1.1 General

We believe that mental health support is key to an inclusive working environment. Thankfully awareness of, and the freedom to speak about, mental health has been steadily improving over recent years, making the discussion both more accessible and more important. There is, however, much still to be done, as our 2022 survey showed (see 7.1.3 below). Working alongside other organisations we have continued to stimulate conversations on this topic and to provide guidance and training to help improve wellbeing in the UK's IP professions.

Our 2022 impact survey confirmed that this work is valued. Representatives of our Charter signatories commented that IP Inclusive has raised general awareness on wellbeing within their organisations. One individual survey respondent said they believed that “the work of IP Inclusive to help break the taboo of wellbeing, especially mental wellbeing, is crucial for [the] IP professions.” 74% of individual survey respondents, and 79% of Charter signatory respondents, believed that IP Inclusive had had a positive impact on wellbeing within the wider UK IP sector.

Highlights of our 2022 work in this area included a re-run of our mental wellbeing survey for the patent and trade mark professions, an event on mental health and intersectionality and several joint webinars with Jonathan's Voice.

7.1.2 Collaborations with external organisations

We recognise that other, more specialist, organisations are already doing great work to promote mental wellbeing. Rather than duplicating their efforts, we have chosen to partner with them wherever feasible.

As such, we continued to work closely in 2022 with the mental health charities LawCare (which serves the entire legal community) and Jonathan's Voice³⁶ (which focuses more on the IP sector). We promoted their activities and resources via our newsletters and social media communications, and where possible collaborated with them on events for our own supporters. We also helped promote relevant events from other IP sector organisations, for example a CITMA webinar for Mental Health Awareness Week.

In the early part of the year our Lead Executive Officer Andrea Brewster met with both LawCare's new D&I champion and an IPO mental wellbeing champion to exchange ideas and discuss collaborations. She remains a LawCare Champion, and is therefore well placed to help the charity ensure its support is accessible to, and appropriate for, IP professionals.

³⁶ See <https://jonathansvoice.org.uk/>

During 2022 we also established a valuable partnership with the wellbeing support consultancy Illuminate VR. Illuminate took part in one of our webinars and subsequently provided discounted training courses for IP Inclusive supporters, with more planned for 2023.

Jonathan’s Voice kindly provided a quote for our 2021-22 impact survey, in which it said that “IP Inclusive has played a key role in raising the profile of mental wellbeing within the profession. We have greatly valued your support and partnership in the work we do.”

7.1.3 Our mental wellbeing survey

We did not manage to repeat our 2018 and 2019 mental wellbeing surveys as we had hoped to in 2021. We did however do so in 2022, launching this version as a collaboration with Jonathan’s Voice to mark Mental Health Awareness Week in May.

As before the survey was open to both CIPA and CITMA members, with separate versions for students and paralegals, but the 2022 survey also extended to business support professionals working in patent and trade mark organisations or departments, who are not necessarily members of either institute. It included questions on the impact of Covid-19; these aligned with questions in LawCare’s 2020-21 *Life in the Law* survey³⁷, to enable comparisons with the wider legal sector. The survey was open throughout May, and re-opened for a period in July to increase participation by CITMA members (whose membership survey had coincided with our May response window).

The survey results were analysed during 3Q 2022 by our Lead Executive Officer Andrea Brewster and Executive Support Helen Smith. They revealed significant levels of stress, anxiety and depression, more than half of all respondents saying they had been adversely affected by stress in the preceding twelve months, at least 45% by anxiety and at least 20% by depression. The most significant causes, as in 2018 and 2019, were said to be related to high workloads. For the student respondents, exams were key contributors as well. Inclusivity-related problems also still appeared to be prevalent.

In terms of business impact, the survey revealed that stress and other mental health issues were leading to reduced productivity, difficulty concentrating, mistakes (or near-mistakes) and reduced confidence, as well as physical problems such as fatigue and loss of sleep. In many cases they had caused respondents to consider leaving their current jobs and/or the profession itself.

Responses about the impact of the pandemic were mixed. Although most respondents said they now benefited from more flexible working arrangements, a significant number were more concerned about work-life balance than pre-Covid, and student respondents more concerned about their exams.

We published our report of the survey results in October 2022³⁸ and were encouraged by the responses, not only from CIPA and CITMA but also from IP sector publications such as *Managing IP*

³⁷ See <https://www.lawcare.org.uk/latest-news/life-in-the-law-new-research-into-lawyer-wellbeing/>

³⁸ See <https://ipinclusive.org.uk/newsandfeatures/the-results-of-our-2022-mental-wellbeing-survey/>

and *World Trademark Review* (both of whose articles included contributions from Andrea)³⁹. Commentators typically focused on the underlying causes as well as the symptoms of stress in the workplace, and on the implications for businesses: we take this as a sign of progress, as we know that individual IP professionals have been struggling for some time but it is their businesses that are best placed to address the problems.

Andrea also offered her personal insights on the survey results and their implications, in a post on our website News and Features page which included practical suggestions for managing working practices to improve team members' wellbeing⁴⁰.

7.1.4 IP Inclusive events

Our 2022 events on mental health and wellbeing, run in collaboration with Jonathan's Voice, were:

- In May (during Mental Health Awareness Week), "Mental health & intersectionality", a panel discussion which brought together all six of the IP Inclusive communities to discuss specific mental health challenges within the groups they represent.
- In June, alongside Illuminate VR, "The sticking plaster and the stairwell", about how organisations can take a more systematic and holistic approach to mental wellbeing.
- In September, "Darkness to hope", a webinar to mark World Suicide Prevention Day, including insights from experts on suicide risks, outcomes and prevention.
- In October, "What's for starters?", an *Inclusivity Unlocked!* webinar on mental wellbeing for early-career IP professionals.
- In November, "Why do men take their lives? – What we know and what we don't", a webinar to mark International Men's Day in the UK that discussed the causes and prevention of male suicide. This included an update on research being funded by Jonathan's Voice at the University of Glasgow's Suicidal Behaviour Research Laboratory.

The May webinar was inspired by the results of LawCare's 2020-21 *Life in the Law* survey, which had revealed strong intersections between diversity and mental wellbeing. Our panellists affirmed those findings and provided suggestions for addressing them.

In early November, we also partnered with Illuminate VR to offer an online mental health first aid (MHFA) refresher course for IP Inclusive supporters, which Illuminate provided at a discounted fee. They are running a full (two-day) MHFA course for us, on the same basis, in January 2023.

Mental wellbeing remains an important topic as organisations emerge from the Covid-19 lockdowns and reshape their working arrangements. We have therefore addressed the topic in several of our *Inclusivity Unlocked!* events and will continue to do so: we are currently working with LawCare, for example, on a 2023 webinar about working cultures.

³⁹ See <https://ipinclusive.org.uk/newsandfeatures/keeping-the-conversation-alive/>

⁴⁰ See <https://ipinclusive.org.uk/newsandfeatures/mental-health-taking-the-long-view/>

7.1.5 Our Mental Health First Aiders' Network

Our Mental Health First Aiders' (MHFAers') Network⁴¹ continues to provide a forum for qualified MHFAers and would-be MHFAers in the IP sector to share experiences and support one another. Exchanges take place through both LinkedIn and WhatsApp groups: at the start of 2023 the LinkedIn group had 65 members (54 at the start of 2022) and the WhatsApp group 31 members. These help us widen access to relevant events and resources.

The discounted training that we now offer in partnership with Illuminate VR provides additional practical support for network members.

7.1.6 Resources and awareness-raising

During 2022 we published several mental health-related posts on our website News and Features page, including one to mark Time to Talk Day in February and one for World Mental Health Day in October; reports from relevant webinars; the results of and follow-up to our mental wellbeing survey; and articles about the IPO's approach to MHFA (shared from the *CIPA Journal*), an external survey on the mental health impact of workplace banter, a Jonathan's Voice response to the EPO's EQE consultation (see 6.3.4 above), and workplace alcohol culture. Many of IP Ability's posts (6.3.3 above) also touched on the mental health implications of living with neurodiversity.

In May, our Lead Executive Officer Andrea Brewster wrote a post on "The loneliness of the IP professional", based on the Mental Health Awareness Week "loneliness" theme, for *World IP Review*; this was re-published on our own website.

Recordings of the key parts of our 2022 webinars were made available via our website resources page, alongside associated content such as speaker presentations and lists of sources of help.

In 2023 we plan to refresh our website Mental Health and Wellbeing page⁴² with a more concise and accessible structure. We will be working with Jonathan's Voice to ensure it signposts the third party sources that are most likely to be of use to our site visitors. Jonathan's Voice are consulting with their supporters about this project and we have also asked ours for input.

7.1.7 Key contacts

Our work on mental health and wellbeing is coordinated by Andrea Brewster. She also co-leads the MHFAer Network with Jonny Lerwill (Airbus Defence & Space).

⁴¹ See <https://ipinclusive.org.uk/newsandfeatures/our-support-network-for-mental-health-first-aiders/>

⁴² See <https://ipinclusive.org.uk/mental-health-and-wellbeing/>

7.2 Lobbying/influence

7.2.1 General

Although we avoid political lobbying, we do try to encourage positive change in our sector. Where we become aware of inequalities, or policies that impact negatively on EDI in the IP professions, we seek to catalyse improvements.

We continue to welcome requests and suggestions from IP professionals who are affected by relevant issues, and where feasible we will help them address those issues. Our six communities also provide forums through which to channel concerns about challenges affecting specific groups: see in particular 6.3.4 above regarding IP Ability's work on disability and accessibility.

The general move towards virtual working continued this year to bring, or develop, changes to IP professionals' core work, for example to the format of tribunal hearings and professional exams. Led by IP Ability, we remain ready to contribute to public consultations on these issues, to help ensure that the needs of all groups are taken into account.

7.2.2 Regulation

IPReg regulates all UK-registered patent and trade mark attorneys. Encouraging a diverse workforce is one of its regulatory objectives. It is therefore uniquely positioned to influence EDI-related attitudes and behaviours in a significant section of the IP professions. We are delighted that it has continued to work with and support IP Inclusive over the last twelve months, whilst also safeguarding an appropriate independence between the regulatory and representative functions of the two organisations.

In March 2022 we filed a response to IPReg's December 2021 consultation paper which, as part of a review of its regulatory arrangements, outlined proposed changes and invited stakeholder views⁴³. Our communities and Advisory Board had input into the draft response. Comments made in our 2021 submissions on this subject⁴⁴ appeared to have been taken on board and our 2022 response:

- Supported IPReg's proposed focus on high-level regulatory principles, in preference to prescriptive rules, which we believe will encourage diversity and inclusivity in the sector's working patterns, business models and client base.
- Approved the extension of this approach to the proposed CPD arrangements, which we believe will help remove barriers to entry into, and progression within, the UK's patent and trade mark professions.
- Praised the use of an EDI-encompassing impact assessment to underpin and inform the proposed changes, as well as the adoption of clear and inclusive language throughout the consultation paper and proposed regulatory arrangements.

⁴³ See <https://ipinclusive.org.uk/newsandfeatures/ip-inclusive-response-to-ipregs-regulatory-review-consultation/>

⁴⁴ See <https://ipinclusive.org.uk/newsandfeatures/ip-inclusive-submissions-for-ipregs-regulatory-review/>

In July 2022 we attended, by invitation, two IPReg stakeholder meetings: one about the regulatory review consultation and proposed follow-up, the other (with CIPA, CITMA and the IP Federation) to discuss collaborative approaches to EDI data gathering.

In August we responded to IPReg’s July consultation on its 2023/24 business plan, budget and practising fees. Our submissions⁴⁵ strongly supported the regulator’s proposal to continue, and extend the scope of, a discretionary fee waiver in ways we had recommended in our response to the corresponding 2021 consultation⁴⁶.

7.2.3 Disability and accessibility

IP Ability, our community for disabled (including neurodivergent) people and carers, also remained active on the lobbying front during 2022, taking the lead on IP Inclusive’s response to an EPO consultation on proposed new exam arrangements. See 6.3.4 above.

7.3 Awards and other publicity

During 2022 we contributed to various IP sector publications, many of them through our communities (see 6 above). We regularly provide content for the *CITMA Review*, as well as monthly updates for the *CIPA Journal*.

We also partnered with *World IP Review* on their autumn 2022 EDI-focused publication *WIPR Diversity*⁴⁷. This yielded opportunities for several of our communities to contribute content on relevant topics. Gordon Harris, IPIM Treasurer, was interviewed for an article about whether EDI targets stimulate change or alienate those trying to achieve it. The publication also carried a feature in which our Lead Executive Officer Andrea Brewster offered her insights on IP Inclusive’s growth and impact since its inception in 2015.

WIPR Diversity publishes annual lists of “Diversity Champions”, “Trailblazers” and “Influential Women in IP”. Five IP Inclusive volunteers featured in the 2022 lists: Isobel Barry (IP Out committee member and former Women in IP committee member), Rachel Bell (IP Futures founder and former committee lead), Becky Campbell (IP Ability committee and Advisory Board member), Chris Clarke (IP Ability committee co-lead) and Vanessa Stainthorpe (North of England Network committee lead and Advisory Board member).

Increasing interest from external publications such as *World IP Review*, *World Trademark Review* and *Managing IP* shows that IP Inclusive is increasing in visibility and influence. Their editors often now turn to our communities, or to our executive team, for comment on EDI- and wellbeing-related

⁴⁵ See <https://ipinclusive.org.uk/newsandfeatures/ip-inclusive-response-to-ipregs-2023-24-business-plan-budget-consultation/>

⁴⁶ See <https://ipinclusive.org.uk/newsandfeatures/ip-inclusive-response-to-ipregs-2022-business-plan-budget-consultation/>

⁴⁷ See <https://newtonmedia.foleon.com/worldipreview/diversity-2022/>

issues. This all helps us increase engagement throughout the IP – and indeed the wider legal – communities, and in turn positions us better to advocate for positive changes in the UK’s IP sector.

8 Impact evaluation

8.1 Our 2022 impact survey

In early 2022, pursuing an objective from our 2021-22 business plan, we embarked on an attempt to “measure and evaluate our impact”. After just over half a year of our new, more independent structure, it felt like the right time to take stock and to feed back to our stakeholders.

In February we launched a survey to obtain stakeholders’ views about IP Inclusive’s impact on IP professionals, their organisations and the UK’s IP sector as a whole⁴⁸. There were two versions: one for Charter signatories and one for individual IP professionals. The former included opportunities to confirm continuing commitment to the six Charter pledges and to update contact details if necessary; notifications were emailed directly to all “authorised signatory” and “designated EDI officer” contacts. The latter was entirely anonymous and was promoted via our website, social media and newsletters. Both allowed respondents to tell us what they valued about IP Inclusive’s work and what more they would like it to provide in future.

By the end of 1Q 2022, the Charter signatory survey had elicited 32 responses (21% of all signatories) and the individuals’ survey 43 responses. Key findings were outlined at our annual meeting in April, and used to help shape the 2022-23 business plan as well as a formal impact report.

8.3 The survey results

The survey responses were incredibly encouraging. They confirmed that for those organisations and individuals who actively engage with IP Inclusive, we are providing valuable benefits. Respondents were largely keen for us to continue providing events, resources, support networks and careers outreach initiatives. A high proportion believed that we have had a positive effect on EDI not only in their own organisations but also in the wider UK IP sector, confirming that we have been delivering on our overall objectives⁴⁹.

Particularly heartening were the respondents’ views on how the UK’s IP professions would look if IP Inclusive did not exist. They painted a picture of a sector which, without IP Inclusive, would lack focus and drive on EDI issues, take a less well-informed approach, share best practices less readily and as a result make much slower progress. Some believed it would still be “stuck in the old ways”. Charter signatory representatives spoke of the sector being “disjointed, unfocused and generally in

⁴⁸ See <https://ipinclusive.org.uk/newsandfeatures/impact/>

⁴⁹ See <https://ipinclusive.org.uk/about/our-mission-statement/>

the dark” without IP Inclusive, and of our having “sped up this catching up of the profession and reduced the time by 3-5 years as a minimum.”

Individual respondents commended the way IP Inclusive had given people more confidence to speak about a wide range of EDI issues, and to share ideas and support. One commented that it “creates an open dialogue and a safe space to discuss sensitive issues”. There was also praise for the support and sense of community IP Inclusive provides, especially for those working in smaller organisations.

83% of the Charter signatory respondents said they believed IP Inclusive had had a positive impact on diversity within the UK’s IP sector. 90% believed it had had a positive impact on inclusion, and 90% on equality of opportunity, in the sector.

Our founding organisations, who gave IP Inclusive its independence in 2021 and are still crucial to its continuing success, gave similarly positive verdicts. CIPA commented: “A test of the purpose of any organisation is simple: if the organisation did not exist, would we want it to? IP Inclusive passes this test with flying colours and we must continue to work together to ensure its future.” The IP Federation view was that “the impact on the IP profession, and wider, that IP Inclusive has brought since the start has been more than just defining policies, programmes or benchmarks,” whilst CITMA said that “IP Inclusive has and continues to contribute to making our profession more diverse, more inclusive and ultimately better to be part of.”

Overall respondents felt that IP Inclusive had raised awareness, challenged thinking and promoted dialogue. As a result EDI improvements were now more widespread throughout the IP professions, which in turn made them more reflective of wider society.

8.3 Our 2021-22 impact report

Our first ever formal impact report was created by our intern Susan Nelson (see 9.4.2 below), based on the survey responses together with our 2021 Annual Report. The result was a visually impactful slide set, which lent itself well to publication on social media as well as in more formal settings, and which could be tailored for presentations to specific audiences if necessary. Susan presented it informally to available IPIM and Advisory Board members in June 2022. She also recorded a video presenting key features of the report, as an additional medium to widen accessibility.

The impact report covered the period 2021-22. It was published on 1 July 2022 via our website⁵⁰ and social media channels. It also accompanied our 2022-23 business plan and budget. We believe it will reassure stakeholders of the value of our work so far and encourage future contributions.

⁵⁰ See <https://ipinclusive.org.uk/newsandfeatures/introducing-our-first-ever-impact-report/>

8.4 A basis for the future

We were extremely pleased to hear that our stakeholders value IP Inclusive’s ability to both catalyse and facilitate change, and to contribute the leadership and drive that were previously lacking in the EDI space. The 2022 survey results are now helping us focus our efforts where they are most needed, in particular on widening participation and developing our resources and support for both Charter signatories and individual IP professionals.

The 2022 survey may also prove a useful basis for an annual procedure by which signatories reconfirm their commitment to the Charter pledges, check their contact details, share EDI updates and ideas from their own experiences, and generally strengthen their sense of involvement in the IP Inclusive community.

We will continue to consider the feasibility of gathering quantitative measurements of our impact, for example by conducting another sector-wide diversity benchmarking survey and comparing the results with those from our 2019 and 2020 surveys. However, in a field like ours we believe the qualitative data are likely to be just as, if not more, meaningful.

9 Structure, governance and management

9.1 General

The structural and governance changes of 2021 have functioned well during 2022, allowing us to expand our work with the confidence of a strong and sustainable supporting framework and sound sources of oversight and guidance.

In particular the Advisory Board, established in September 2021 to guide and support our work, has had a successful first year: see 9.5 below. A good working relationship is evolving between the Board and our governing body IPIM.

It remains our longer-term goal to incorporate IP Inclusive as a Community Interest Company. That depends on the initiative’s ongoing success and financial viability, however. It is currently too early to contemplate such a major transition.

9.2 IP Inclusive Management

9.2.1 General

IP Inclusive Management (IPIM)⁵¹ continues to oversee activities carried out under the IP Inclusive and Careers in Ideas banners; to be responsible for the assets and liabilities arising from those

⁵¹ See <https://ipinclusive.org.uk/ip-inclusive-management/>

activities; and to ensure that IP Inclusive functions appropriately at the formal and administrative levels. In particular through its executive team (see 9.3 and 9.4 below), it guides and supports the many volunteers whose work is crucial to our success, and provides them with organisational backup.

IPIM's current members (appointments confirmed at the 2022 AGM) are:

- Michael Silverleaf KC, 11 South Square (Chair)
- Julia Florence (Secretary)
- Gordon Harris, Gowling WLG (Treasurer)
- Andrea Brewster
- Alicia Chantrey, Associated British Foods
- Julie Dunnett
- James St Ville KC, 8 New Square

Andrea Brewster is both an IPIM member and IP Inclusive's Lead Executive Officer.

A register of IPIM members' interests was created in January 2022 and is now available on the IPIM page of our website⁵². It was updated in April and July 2022.

We anticipate changes to IPIM's membership during 2023; we therefore hope to recruit one or two new members before our next annual meeting so as to ensure adequate succession planning.

9.2.2 2022 meetings

IPIM met on 17 January, 1 March, 5 April, 10 May, 28 June, 20 September, 18 October and 13 December 2022. Its formal AGM was incorporated into IP Inclusive's annual meeting on 26 April 2022. The minutes of all IPIM meetings are available from the IP Inclusive website⁵³.

9.2.3 Financial issues

IPIM is responsible for IP Inclusive's annual business plan and budget. These are prepared by the Lead Executive Officer with input from the Advisory Board and from stakeholder contributions at the annual meeting. Our business plan and budget for August 2022 to July 2023 were published on 1 August 2022¹.

It is also responsible for IP Inclusive's annual (including financial) reports: those for 2021 were published on 27 January 2022⁵⁴ and formally accepted at the 26 April AGM.

For more details of IP Inclusive's finances, see 10 below.

⁵² See <https://ipinclusive.org.uk/ip-inclusive-management/> and <https://ipinclusive.org.uk/the-ip-inclusive-management-team/>

⁵³ See <https://ipinclusive.org.uk/newsandfeatures/ipim-meeting-minutes-2022/> for those from 2022

⁵⁴ See <https://ipinclusive.org.uk/newsandfeatures/our-2021-annual-report/>

9.2.4 Risk management

IPIM is responsible for managing the risks associated with IP Inclusive’s activities. We believe those to be small: see the risk assessment in our March 2021 “Plans for IP Inclusive’s Future”⁵⁵. They are mitigated by:

- Sound internal governance and supporting structures.
- A cautious approach to budgeting and cash flow.
- A ring-fenced contingency fund.
 - This exists in case IP Inclusive needs to be dissolved at short notice. It contained £10,000 at the start of the period from August 2022 to July 2023 and will be increased by an appropriate amount each year to accommodate growth. It does not affect our not-for-profit method of operating.
- Transparent and open communications with (including input from) our stakeholders.
- A code of conduct⁵⁶ for the volunteers and others (including executive staff, Advisory Board members and IPIM itself) who represent IP Inclusive.
 - The code is accompanied by terms of reference, guidelines and where appropriate formal policies to assist the people to whom it applies.
- Back-up and sharing of key systems and information.

IPIM holds third party liability insurance appropriate for a small unincorporated association acting in the community interest. The policy includes £5M of public liability insurance and £10M of employer’s liability insurance, together with legal expenses protection. It is underwritten by Markel International Insurance Company Ltd and was secured through the brokers Access Insurance, who specialise in working with community groups and charities. It is renewed annually in February.

We keep the brokers informed of relevant changes to IPIM’s circumstances, for instance to its structure, finances or employment obligations. Fortunately these have not to date resulted in significant changes to our annual premium or insurance terms.

9.3 The Lead Executive Officer

Andrea Brewster remains in post as IP Inclusive’s Lead Executive Officer, her contract having been updated and renewed for a further twelve months from 1 July 2022.

The Lead Executive Officer’s role – delegated by IPIM – is to manage IP Inclusive’s activities and day-to-day operations, coordinating and supporting the work of its volunteers in pursuit of the initiative’s objectives. During 2022 she additionally oversaw the recruitment, appointment and

⁵⁵ See <https://ipinclusive.org.uk/wp-content/uploads/2021/03/210317-plans-for-ip-inclusives-future.docx>

⁵⁶ See <https://ipinclusive.org.uk/wp-content/uploads/2021/10/211013-ip-inclusive-volunteers-code-of-conduct.pdf>

onboarding of our intern Susan Nelson and two new executive staff (see 9.4 below), whom she now line manages.

Andrea works as a contractor to IPIM. Her fees, including for additional (budgeted) work on HR issues in 2Q and 3Q 2022, are provided for in the 2021-22 and 2022-23 budgets. Her normal payable hours were increased with the July 2022 contract renewal from 2 to 2.5 days a week, with a pro rata increase in remuneration, due to her increasing workload. It is however the Lead Executive Officer's responsibility to provide for this in IP Inclusive's budgets and ensure sufficient funds are raised to cover it.

Andrea had minor surgery in both mid-May and late September. This did not unduly affect IP Inclusive's day-to-day operations and her overall monthly hours were maintained. Her workload remained as high in 2022 as in 2021, but the additional contracted hours, along with the support of the new executive team, made this more manageable. She is now able to focus more of her time on strategic and management issues.

The Lead Executive Officer's 2022 quarterly reports to IPIM are published on the IP Inclusive website⁵⁷. Note that there is no separate report for 4Q 2022; relevant updates are instead incorporated into this Annual Report.

9.4 Other executive staff

9.4.1 General

As intended – although a little later than planned – 2022 saw major changes for IP Inclusive on the HR front. We acquired both an intern and subsequently two permanent part-time assistants, creating an executive team to support the Lead Executive Officer. This is allowing us to provide more and better events and resources, strengthen our communication channels (both external and internal) and generally improve support for our communities and other volunteer networks. In turn this helps ensure that all parts of IP Inclusive work together in pursuit of our strategic objectives.

9.4.2 Intern

In 1Q 2022, the law firm Clifford Chance offered to pay one of their future trainees to work with us for four weeks, full-time, under their "LIFT" internship scheme. We felt this would be a good way to "test the water" for our own intended internships in the future, for example to help with Careers in Ideas projects and general IP Inclusive comms. Clifford Chance provided us with a shortlist of three highly suitable candidates, from which we selected Susan Nelson.

Susan's LIFT internship lasted from 30 May to 24 June 2022. It went incredibly well and she provided valuable help, in particular:

⁵⁷ See <https://ipinclusive.org.uk/newsandfeatures/lead-executive-officers-reports/>

- Reviewing our February impact survey responses and creating our first ever impact report with an associated presentation, video and social media content.
- Involvement in the Careers in Ideas task force (see 3 above), including setting up an Instagram account and overseeing website visitor emails.

In addition Susan prepared event and meeting reports, helped generate our update newsletters, and posted content on the IP Inclusive Twitter account to mark EDI awareness dates.

This four-week pilot established that with the right person, a graduate internship can be a useful and appropriate resource for IP Inclusive. It went sufficiently well for us to offer Susan an IP Inclusive-paid internship lasting from 27 June until she moved on to continue her legal training at the end of October. During this period she worked two (flexible) days a week, supporting both Careers in Ideas and more general IP Inclusive activities including:

- The *Inclusivity Unlocked!* programme (see 5.2 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, for example event reports and articles to mark EDI awareness dates.
- The IP Inclusive Twitter account.
- Our update newsletters.
- Various Careers in Ideas projects (3 above).

Susan worked from home: her entire internship, from interview and appointment onwards, was successfully conducted online.

9.4.3 Administrative support

Preparatory work for appointing our new Administrative Support was completed in 2Q 2022, with the creation of a role specification and contract. We appointed Emphasis HR & Training to advise us on the legal and other HR aspects of recruiting, appointing and employing staff members, and to provide a template contract and offer letter which we could use for this and future IP Inclusive roles (including internships).

The new post of IP Inclusive Administrative Support was advertised from mid-July 2022 with a closing date of 31 August, the vacancy appearing on the IP Inclusive website, in our update newsletters and (thanks to Advisory Board member Pete Fellows) on the Fellows and Associates jobs page. This yielded a small but strong field of candidates, from which we appointed two: Anne Burgato and former patent attorney Helen Smith.

The decision to appoint two people was taken partly to provide succession cover for our intern Susan Nelson and partly to diversify the skill sets in the new executive team. We created two positions: an “Executive Support” (Helen’s role), which would overlap with and then replace Susan’s

work on reports and on project managing the *Inclusivity Unlocked!* and *Summer of IP* campaigns, and the originally-envisaged “Administrative Support” (Anne’s role).

The period of overlap between Helen and Susan was made possible by unspent budget from 2021-22, when we had intended to appoint employees but lacked the time. Helen’s new role is covered by the 2022-23 budget for intern support, from which we still have sufficient funds for an additional one day a week of intern-level help should we need it. We are however hopeful that the 2022 internship arrangement with Clifford Chance (see 9.4.2 above) – and/or similar schemes with other organisations – can be repeated during 2023.

Helen Smith started work with us on 5 September 2022 and works 8 hours a week, normally on Tuesdays and Wednesdays from 11 am to 3 pm. Her role as Executive Support includes:

- Coordinating *Inclusivity Unlocked!* and *Summer of IP*.
- Writing formal documents and reports.
- Collating resources.
- Creating event reports, other online content and update newsletters.

In her first month, Helen analysed and reported the results of our 2022 mental wellbeing survey.

Anne Burgato’s employment with us began on 6 September 2022. She too works 8 hours a week, normally on Mondays and Wednesdays from 10 am to 2 pm. Her role as Administrative Support includes:

- Book-keeping, invoicing, payroll management and other accounting processes.
- Charter signatory liaison and maintenance of our databases of Charter and Senior Leaders’ Pledge signatories and the associated mailing lists, including processing new sign-ups.
- Helping with event management and comms.
- Creating some event reports and associated resources.
- Helping with website content updates and social media (in particular LinkedIn) posts.
- Monitoring some of the IP Inclusive email accounts and handling associated supporter correspondence.
- General administrative support for the Lead Executive Officer.

From 2023 Anne will also be providing secretarial support to IPIM, for example preparing minutes and scheduling meetings.

Both Helen and Anne are formally employed by IPIM – as was our intern Susan – and report directly to the Lead Executive Officer Andrea Brewster. They work virtually, from their own homes, with a degree of flexibility in their weekly hours by agreement with Andrea. To an extent their roles are still evolving, as we develop a feel for their respective strengths and the areas in which the three executive team members can support one another as well as the IP Inclusive volunteers.

9.5 The IP Inclusive Advisory Board

9.5.1 General

The IP Inclusive Advisory Board⁵⁸ was established in September 2021. It is a non-executive body which acts as an informal sounding board and “critical friend” to IPIM. In particular its members advise on IP Inclusive’s strategies and plans; make recommendations based on their knowledge of the IP sector and of relevant best practices elsewhere; update us on developments and opportunities they become aware of; help us take account of the needs and views of the community we serve; and act as ambassadors among the groups to which they have access.

Those members represent a range of IP sector roles, backgrounds and career levels, bringing diverse perspectives to bear on IP Inclusive’s decisions. This in turn allows more volunteer influence over our strategies and policies as well as our day-to-day work, which helps us tailor the support we provide.

9.5.2 Personnel

The Board’s current 25 members, appointed by IPIM, are Susan Antoine (Haseltine Lake Kempner; South West Network); Carol Arnold (retired, formerly Shell); Julie Barrett (Purposive Step Consulting; Careers in Ideas task force); Julie Browne (Shell; Careers in Ideas task force); Caelia Bryn-Jacobsen (Kilburn & Strode; IP Ability); Ben Buchanan (IPO); Becky Campbell (Mewburn Ellis; IP Ability); Liz Dawson (Dentons); Pete Fellows (Fellows and Associates); Jodie Johnson (Boult Wade Tennant); David Joo (Aon; Careers in Ideas task force); Saiful Khan (Potter Clarkson); Abdulmalik Lawal (Franks & Co; IP & ME; North of England Network); Liam Lawlor (TLIP); Josh McLennon (Kilburn & Strode; IP & ME); Charlene Nelson (Foot Anstey; Mental Health First Aiders’ Network); Carol Nyahasha (Elkington & Fife; Careers in Ideas task force); Sarah Phillips (Abel + Imray; IP Non-traditional Family Network); Megan Rannard (Marks & Clerk; IP Ability); Beatriz San Martin (Arnold & Porter); Rina Sond (Rina Sond & Associates); Vanessa Stainthorpe (HGF; North of England Network); Kathryn Taylor (Ocado Group); Sarah Vaughan (CITMA); and Sheila Wallace (Marks & Clerk; Careers in Ideas task force).

During 2022, Ben Buchanan served as Chair and Josh McLennon as Secretary. Carol Arnold succeeds Ben from the start of 2023 but Ben will remain as a Board member. Josh continues as Secretary.

Dola Kayode-Temenu resigned from the Board in July. There are no immediate plans to replace her, but the remaining members will discuss in a future meeting the membership term, succession planning and recruitment mechanisms.

9.5.3 2022 meetings

The Advisory Board met four times during 2022, on two of which occasions they were joined by IPIM members for part of the meeting:

- 1 March 2022

⁵⁸ See <https://ipinclusive.org.uk/the-ip-inclusive-advisory-board/>

- Discussions covered (a) how IP Inclusive can widen its reach to currently under-represented groups such as paralegals and business support professionals; (b) how it can hear and respond to those who are critical of, or otherwise not engaged with, EDI issues; and (c) initial suggestions for the 2022-23 business plan.
- The Board reported key outcomes to IPIM in the second part of the meeting.
- 9 June 2022
 - Discussions focused on the draft 2022-23 business plan, in light of input from the 26 April annual meeting.
- 20 September 2022
 - The Board discussed (a) what the *Inclusivity Unlocked!* programme 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.
 - IPIM members attended the second part of the meeting to hear the main discussion outcomes and also to explore the ongoing relationship between IPIM and the Advisory Board after this first year.
- 20 December 2022
 - Discussions covered (a) meeting logistics such as timing and reporting; (b) the Board's fulfilment of its terms of reference thus far; (c) IP Inclusive's priorities for 2023/24; and (d) items to address in a planned informal "Q&A" session with the Lead Executive Officer in early 2023.

Advisory Board members were also present at the 2022 annual meeting (see 11.1 below), at which the Chair Ben Buchanan gave an update on their work.

Formal minutes from the Advisory Board's meetings are published on the IP Inclusive website⁵⁹.

9.5.4 Advisory Board/IPIM liaison

In addition to their joint meetings, the Board provides more detailed advice to IPIM through its internal meeting notes, and through occasional *ad hoc* discussions between the Board's Chair and Secretary and our Lead Executive Officer Andrea Brewster. Board members also help IPIM with specific projects where necessary: see 9.5.5 below.

To develop this relationship, our 2023 plans include allowing for longer joint meetings, potentially appointing an IPIM member to attend Board meetings as a rapporteur, and/or more direct involvement from the Lead Executive Officer.

9.5.5 Other Advisory Board work

Individual Board members provided IPIM with the following additional assistance during 2022:

⁵⁹ See <https://ipinclusive.org.uk/newsandfeatures/advisory-board-meeting-minutes-2021-22/> for those from 2021 and 2022

- Trade mark clearance advice for the IP Inclusive AskME directory (see 6.2.4 above).
- Input into the role specification for the new Administrative Support, and help with advertising the vacancy (9.4.3 above).
- Feedback on a preliminary presentation, by our intern Susan Nelson, of the 2021-22 impact report she had prepared (8.3 above).
- Input into the draft 2022-23 business plan before its publication in August.
- A talk at CIPA’s paralegals’ conference dinner in October (4.2 above).

Two members featured in the 2022 *WIPR Diversity* publication, helping to raise IP Inclusive’s profile in the wider IP sector. Becky Campbell was listed as a 2022 “Trailblazer” and Vanessa Stainthorpe as a 2022 “Diversity Champion in IP”, Becky also contributing to an article on neurodiversity.

10 Financial matters

10.1 General

IPIM is responsible for IP Inclusive’s financial affairs. Its 2022 summary financial report is provided in Annex I. Note that although IPIM’s formal accounting year runs from 1 April to 31 March, the figures in Annex I are for the calendar year 2022.

Gordon Harris continued in post as IPIM Treasurer during 2022. The day-to-day book-keeping and financial management are delegated to our Lead Executive Officer Andrea Brewster.

At the end of 2022 IP Inclusive had a healthy bank balance, which included a ring-fenced contingency fund. With the donations raised for the 2022-23 business plan, together with the surplus from 2021-22, it will be able to continue to operate at current levels through to at least the summer of 2023.

10.2 Development of accounting systems

In 1Q 2022 IPIM appointed the Haines Watts Group to act as its accountants, working with the Bristol branch office. During 2Q 2022 the firm helped us set up IPIM’s financial records on the cloud-based accounting platform Xero, providing training for Andrea and Gordon. They now host and manage the Xero subscription for us. The Xero account is linked with the IPIM bank account.

Haines Watts provide guidance on IPIM’s tax and reporting as well as general financial affairs. Since June 2022 they have also provided us with outsourced payroll services for our employees.

Formal details for IPIM’s financial systems are provided in Annex I.1.

10.3 Fundraising

IP Inclusive is funded purely through voluntary donations⁶⁰. Consultations with our stakeholders in 2021⁶¹ had revealed support for a Charter signatory subscription scheme but indicated that it might have limited value. We feel it is important, for inclusivity, that our events and resources remain free at the point of delivery, and have therefore retained a “Wikipedia”-style model that asks supporters to give what they can, when they can. This also simplifies our tax and accounting obligations as well as our internal systems.

We run an annual fundraising campaign to secure funds to implement the following year’s business plan. The 2021-22 campaign successfully raised all the money we needed for the year’s activities with some to spare, confirming that our chosen model was both appropriate and effective. Some of the donations were for specific projects, for example Careers in Ideas intern support, its Mentoring Hub and its website hosting, or the establishment of online accounting systems. The rest we were free to allocate to any part of the 2021-22 budget.

Our 2022-23 campaign was launched in August 2022, through our mailing lists, website and other social media comms. We also set up a JustGiving page for individual donations⁶². As in 2021 we have been delighted at the level of support received from our Charter signatories, particularly from the patent and trade mark sectors and more particularly from our founding organisations.

By the end of 2022 we had raised £45,800 of our £80,000 target. In the current economic climate this is an encouraging indication of the importance of EDI, and specifically of IP Inclusive’s work, in the UK’s IP professions. Further donations are still expected from specific supporters before the end of this budgeting period, to which we hope to add during 1Q 2023 by reminding other Charter signatories of the opportunity to contribute. If we are unable to raise the full £80,000 we may have to delay some of the optional projects suggested in the 2022-23 business plan, however day-to-day activities should not suffer and the ring-fenced contingency fund (see 9.2.4 above) remains secure.

11 Other operational matters

11.1 Annual meeting

Our annual meeting on 26 April 2022, hosted online by Abel + Imray, brought together around 90 IP Inclusive stakeholders. All UK-based IP professionals were welcome to attend, and invitations were sent to key IP sector organisations including the IPO, IPReg and relevant membership bodies. A good range of professional roles, organisations and career levels was represented.

⁶⁰ See <https://ipinclusive.org.uk/ip-inclusive-fundraising/>

⁶¹ See <https://ipinclusive.org.uk/newsandfeatures/to-diversity-and-beyond-plans-for-ip-inclusives-future/> and <https://ipinclusive.org.uk/newsandfeatures/to-diversity-and-beyond-survey-results/>

⁶² See https://www.justgiving.com/crowdfunding/ip-inclusive-2022-23?utm_term=dPdQ2p4jN

We heard updates from our communities, networks and working groups, and from IPIM and its new Advisory Board. The subsequent breakout discussions yielded valuable feedback to help shape our 2022-23 plans.

This meeting also incorporated the formal IPIM AGM.

11.2 Websites

11.2.1 The IP Inclusive website

The IP Inclusive website (<https://ipinclusive.org.uk/>) remains key to our communications with supporters. It is also important as a repository for formal documents and information, for instance about our governing body IPIM, the Advisory Board and IP Inclusive’s general structure and governance, thus ensuring transparency and accountability to our stakeholders.

During 2022 we published on the site:

- 67 “News and Features” posts
- 19 items on the resources page
- 37 event posts

These are described in more detail at 5 – in particular 5.3 and 5.4 – above.

Visitor stats for the site are collected through the free Google Analytics service.

11.2.2 The Careers in Ideas website

The Careers in Ideas website (<https://careersinideas.org.uk/>) sees less use than the main IP Inclusive one. During 2022 we published 10 news posts on its news and events page⁶³: see 3.5 above. We also posted two events on that page (a Careers in Ideas and a CITMA webinar) and two new items on the resources page⁶⁴, all to mark National Careers Week (3.3 above).

The site was designed to be low-maintenance but because it gives us less editorial freedom, we are increasingly hosting Careers in Ideas content – for example for the Mentoring Hub and the *Summer of IP* campaign – on the IP Inclusive site. An upgrade of the site remains on our wish-list, but we lacked the resources (in particular time) to progress it during 2022. Ultimately we still want it to be better structured, more accessible and user-friendly, and easier to maintain. It would also now benefit from more up-to-date (and better supported) technical features. We hope to revive its “opportunities” page, so as to provide would-be recruits with information about open days, work placements, internships and similar opportunities: the *Summer of IP* campaign may help provide a

⁶³ See <https://careersinideas.org.uk/news-events-student/>

⁶⁴ See <https://careersinideas.org.uk/resources/>

blueprint for that. A new site could also create a platform for a more accessible version of the existing “careers pathways map”.

11.2.3 Administration and maintenance

Both websites are hosted by Making Websites Better Ltd (MWB), which – under its former name Visix Ltd – designed and developed them. This arrangement allows us continued access to people who are well placed to maintain and if necessary develop the sites. For example, MWB also created the additional functionality we needed for our AskME directory (see 6.2.4 above).

For the IP Inclusive site we upgraded our standard hosting package, towards the end of November 2022, to MWB’s “WebCare” package. This includes regular checks of the site functionality and ongoing monitoring of, and updates to, the “plug-ins” that are essential to its operation. In addition the package provides 12 hours of developer time every year for sorting glitches and for making small *ad hoc* improvements if necessary. The additional £990 a year that it costs us is accommodated in the 2022-23 budget, which allowed for essential fixes and upgrades to features such as the events, calendar, community, mailing list sign-up and News and Features pages.

We are not currently proposing to extend WebCare to the Careers in Ideas site. It is less business-critical than the IP Inclusive one (which in an emergency could be used as a backup for Careers in Ideas content) and in any case is in need of a more general upgrade, as outlined above.

11.3 Other comms

Our social media activity continues to be vital to our stakeholder engagement and is used to drive traffic to the websites for more substantive content. At the start of 2023, @IPInclusive had 2,144 followers on Twitter, while our LinkedIn discussion group had 687 members (the corresponding figures for the start of 2022 were 2,073 for Twitter and 584 for LinkedIn). Our networking and support communities have their own LinkedIn groups and Twitter accounts, through which they raise awareness of more specific issues. IP Ability (see 6.3 above) also has a Facebook account, whilst Careers in Ideas has dedicated Twitter, LinkedIn and Instagram accounts (3.5 above).

We use our Mailchimp mailing lists⁶⁵ (a general “IP Inclusive Updates” list; lists for each of the communities and regional networks; and lists for the authorised signatories and EDI officers of our Charter signatories) to make supporters aware of our own activities and of general EDI-related developments. The IP Inclusive Updates list had 891 subscribers at the start of 2023 (compared to 812 at the start of 2022). 597 people had subscribed to notifications of new News and Features posts on our website (compared to 537 at the start of 2022). During the year we sent roughly fortnightly emails to the IP Inclusive Updates subscribers, with copies to the Charter EDI officers.

⁶⁵ See <https://ipinclusive.org.uk/stay-in-touch/>

IP Inclusive Management is registered as a data controller with the Information Commissioner’s Office (ICO), under the reference ZA328855. Our privacy notice is available on our website⁶⁶.

11.4 Online accounts

Where possible we use free accounts for our IT and admin support, but certain functions have proved worth paying for. These are:

- Mailchimp: “Essentials” plan, billed monthly. Vital for our stakeholder comms, this account holds all our mailing list contacts, including for the communities, regional networks and Charter signatories, and allows us to send regular newsletters as well as occasional more specific notices about our activities and events. Notifications of new website “News and Features” posts are also sent out through Mailchimp for those who subscribe to them.
- Zoom: “Pro” account, billed annually in March. This versatile and well-supported platform hosts a large proportion of our meetings and events, some for individual communities or networks and some for IP Inclusive more generally. It is straightforward to use, with intuitive and accessible in-meeting functionality, allowing us to adopt a range of event formats both formal and informal. Scheduling is easy, as is the generation and sharing of recordings to widen access to event content. The Zoom account is shared with, and funded by, our Lead Executive Officer Andrea Brewster.
- SurveyMonkey: “Standard” plan, billed annually in March. This has proved invaluable for collecting and analysing stakeholder feedback as well as for more focused research in the IP professions. During 2022 we used it for our impact survey, our mental wellbeing survey with Jonathan’s Voice and IP Ability’s update of its 2019 launch survey, as well as to invite suggestions for *Inclusivity Unlocked!* event themes and formats.

We also make extensive use of the following, as yet unpaid, accounts:

- Eventbrite: this event management platform links well to our website event posts and to our Zoom account for access to online events. It is currently free so long as tickets are not charged for, which suits IP Inclusive well. During 2022 we used it to manage 18 events, two of which needed separate registration links for online and in-person attendees. It is proving invaluable for the *Inclusivity Unlocked!* programme.
- YouTube: we use our YouTube channel to host both event recordings and more general resources. During 2022 we posted 26 videos on it; these included 14 event recordings, 9 Careers in Ideas resources, introductory videos for IP & ME and IP Out, and our 2021-22 impact report presentation.
 - We publish our videos “unlisted” to reduce spam and trolling problems. Delegates are informed if we intend to record an event, and decisions about whether or not to

⁶⁶ See <https://ipinclusive.org.uk/privacy-policy/>

record or to publish recordings are generally guided by speaker preferences and advice, depending on the subject matter. Breakout discussions are not usually recorded, to allow for greater openness; this also applies to our “Pledge Prattle” meetings (see 2.5 above).

11.5 Key contacts

General operational matters and comms are managed by our Lead Executive Officer Andrea Brewster and overseen by IPIM. Andrea also maintains the IP Inclusive and Careers in Ideas Twitter accounts, the latter in collaboration with the Careers in Ideas comms team (see 3.7 above).

The IP Inclusive website is curated by Andrea Brewster and Jonny Lerwill (Airbus Defence & Space), with help from Emily Teesdale (Airbus) in sourcing posts for the News and Features page and from the AskME working group (see 6.2.6 above) for development work on that directory.

Since joining our executive team in September 2022, Anne Burgato has helped with website updates and with LinkedIn, events-related and Charter signatory comms, whilst Helen Smith has taken the lead on our update newsletters. Our intern Susan Nelson also helped to create and post social media content, for Careers in Ideas and for IP Inclusive more generally, during her time with us.

Comms specific to the communities and regional networks are managed by their individual committees, with backup where needed from Andrea and the executive team.

12 Acknowledgements

12.1 General

IP Inclusive would like to thank everyone who helped to make 2022 a success, including those who donated funds; hosted or organised events; spoke or introduced speakers; housed what few possessions we have (exhibition banners and promotional materials); and contributed time, energy, expertise, ideas and enthusiasm.

Particular thanks go to the individuals who led or contributed to specific projects such as the Careers in Ideas Mentoring Hub, the AskME directory, the *Inclusivity Unlocked!* programme and the *Summer of IP* campaign; to committee members in the communities and regional networks; to the Careers in Ideas task force, the Mental Health First Aiders’ Network and the Advisory Board; and to the IP Inclusive Management team, whose guidance is vital to our stability and success. We are also grateful to these people’s employers and business colleagues for supporting their involvement in IP Inclusive.

Thanks too to CIPA for providing us with an “address for service” for formal purposes and both handling and funding our domain name registrations, and to Keven Bader and Joy Dublin at CITMA for looking after the IPIM bank account.

12.2 2022 donors

During the first half of 2022 we received further donations towards our 2021-22 business plan (including the associated operating costs) from Gowling WLG, IPReg and Osborne Clarke.

In addition we received donations towards specific Careers in Ideas activities (for example the Mentoring Hub and the provision of intern support) from FICPI-UK, the IP Federation and the IPO. IP Out also received a dedicated donation from Triona Desmond.

Thus far the following organisations have contributed to our 2022-23 fundraising campaign: 8 New Square, 11 South Square, Abel + Imray, Appleyard Lees, Boulton Wade Tennant, Brabners, Cameron Intellectual Property, Carpmaels & Ransford, CIPA, CITMA, Dehns, Finnegan, HGF, Hindles, the IP Bar Association, Marks & Clerk, Mathys & Squire, Mewburn Ellis, Mishcon de Reya, Murgitroyd, Page White Farrer, Potter Clarkson, Sipara, Stratagem IPM and Venner Shipley.

We are extremely grateful to all of these donors. Their generosity has allowed us to keep our events and resources on the right side of the “paywall” for everyone in the UK’s IP professions.

12.3 Event organisers and hosts

With the gradual move back to in-person events, as well as to “hybrid” versions with online access, we have been grateful to the following organisations who have provided real-life venues and refreshments for our 2022 events: Allen & Overy, Carpmaels & Ransford, CMS Cameron McKenna Nabarro Olswang, Finnegan Europe and Gowling WLG. We would also like to thank Abel + Imray, CIPA and Illuminate VR for hosting online meetings for us, and Marks & Clerk who paid for the first round of drinks at our Midlands Network and IP Out event to celebrate Birmingham Pride.

Several other organisations have shared their online meeting facilities for IP Inclusive activities, for example committee and working group meetings or individual sessions of the Women in IP coffee dates. We are grateful to them too.

Special thanks are due to the individuals whose hard work ensured the success of these events, and to the numerous speakers and discussion leaders – both within and outside the IP sector – who provided their time and expertise for free so that we in turn could offer free training and resources to the IP Inclusive community.

12.4 Other partners

We would like to extend our thanks to Focal Point Training, Illuminate VR and Jonathan’s Voice, all of whom worked alongside IP Inclusive on 2022 projects and who continue to provide support, advice, ideas and welcome opportunities for our supporters to benefit from their work.

12.5 And finally...

Our thanks go not only to those who are named in this report but also to those who have worked behind the scenes, or simply supported us or spoken about us or attended our events. Sincere apologies if we have omitted to mention you; please know that we are hugely grateful for your contributions.

13 Notes

Unless otherwise stated, references in this report to numbers of EDI Charter signatories, mailing list subscribers, Twitter and Instagram followers, and LinkedIn and Facebook group members “at the start of 2023” were recorded on 3 January 2023. Those listed for “the start of 2022” are taken from the 2021 Annual Report⁵⁴ and were mainly recorded on 5 January 2022.

Annex I: IP Inclusive Management 2022 Financial Report

I.1 Formal matters

IP Inclusive Management (IPIM) is an unincorporated association and is not VAT-registered. In accordance with its constitution⁶⁷, it operates on a not-for-profit basis. All income is used to pursue the IP Inclusive objectives⁶⁸ and to ensure that our events and resources remain free at the point of delivery to UK-based IP professionals. Payments received by IPIM are accepted as voluntary donations to the IP Inclusive cause; no products or services are provided in return.

IPIM banks with Lloyds Bank plc. CITMA’s Chief Executive Keven Bader continues to manage this account for us, having established it originally.

IPIM’s accountants are the Haines Watts Group (Bristol branch). Its accounting records are kept on the cloud-based Xero platform, the subscription for which is managed by Haines Watts. Haines Watts also provide outsourced payroll management and associated legal and financial advice.

Internally, the IPIM finances are managed by our Administrative Support Anne Burgato and our Lead Executive Officer Andrea Brewster. They are overseen by the IPIM Treasurer Gordon Harris. The IPIM financial year runs from 1 April to 31 March.

I.2 Summary of 2022 finances

Opening bank balance 1.1.22:	£51,095.31
Income:	£62,516.00
Expenditure:	£50,074.54
Closing bank balance 31.12.22:	£63,536.77
(incl ring-fenced contingency fund)	(£10,000.00)
Creditors at 31.12.22:	£0
Debtors at 31.12.22:	£0

⁶⁷ See <https://ipinclusive.org.uk/wp-content/uploads/2021/06/210607-new-ipim-constitution.pdf>

⁶⁸ To promote and improve equality, diversity, inclusivity and wellbeing in the UK’s IP professions, and to act for the benefit of the community of UK-based IP professionals and those they work with, and also of those wishing to join that community (see section 2 of the IPIM constitution)

I.3 Breakdown of 2022 income and expenditure

	In £	Out £
Income:		
General donations towards the 2021-22 business plan	5,700.00	
Donation towards Careers in Ideas MentorLoop subscriptions	5,000.00	
Donation towards Careers in Ideas support	2,300.00	
General donations towards the 2022-23 business plan	45,800.00	
Donation to IP Out	720.00	
Other donations (operating costs to end July 2022)	2,996.00	
	<hr/>	
Total	62,516.00	
Expenditure:		
Lead Executive Officer fees ⁶⁹		27,411.00
Lead Executive Officer expenses		261.44
HR costs ⁷⁰		9,570.83
HR advice & contract set-up		892.80
Accountants' advice; Xero set-up & subscriptions; payroll set-up & ongoing charges		1,033.20
MentorLoop subscriptions for Careers in Ideas		6,033.60
WebCare support package for IP Inclusive website ⁷¹		990.00
Other operational costs ⁷²		3,881.67
		<hr/>
Total		50,074.54

⁶⁹ Includes additional fees for the recruitment, appointment and onboarding of staff (as per the 2021-22 and 2022-23 budgets)

⁷⁰ Includes salaries, tax, NI and employee expenses

⁷¹ See 11.2.3 above

⁷² Includes bank account charges, Mailchimp and SurveyMonkey subscriptions, insurance, website hosting (2022 & 2023), ICO data protection fee, and small *ad hoc* website fixes and updates

Annex II: IP Inclusive contact details

IP Inclusive	<p>Website: https://ipinclusive.org.uk/</p> <p>LinkedIn group: "IP Inclusive" https://linkedin.com/groups/8473869</p> <p>Twitter: @IPInclusive</p> <p>Emails: General (inc fundraising) queries: contactipinclusive@gmail.com Charter queries: ipinclusivecharter@gmail.com Events queries: ipinclusiveevents@gmail.com Data protection queries: The Data Protection Officer at ipinclusivedata@gmail.com</p>
IP & ME	<p>Website: https://ipinclusive.org.uk/community/ip-me/</p> <p>LinkedIn group: "IP Inclusive: IP & ME" https://linkedin.com/groups/12049564</p> <p>LinkedIn profile: https://www.linkedin.com/in/ipandme/</p> <p>Twitter: @ipinclusiveIPME</p> <p>Email: bameipinclusive@gmail.com</p>
IP Ability	<p>Website: https://ipinclusive.org.uk/community/ip-ability/</p> <p>LinkedIn group: "IP Inclusive: IP Ability" https://linkedin.com/groups/13756630</p> <p>Twitter: @IP_Ability</p> <p>Facebook: "IP Ability community" https://www.facebook.com/groups/3125107824186976</p> <p>Email: IPAbilityNetwork@gmail.com</p>
IP Futures	<p>Website: https://ipinclusive.org.uk/community/ip-futures/</p> <p>LinkedIn group: "IP Inclusive: IP Futures" https://linkedin.com/groups/8792265</p> <p>LinkedIn profile: https://www.linkedin.com/in/ip-futures-12422b187/</p> <p>Email: ipfuturesinclusive@gmail.com</p>
IP Non-traditional Family Network	<p>Website: https://ipinclusive.org.uk/community/ip-non-traditional-family-network/</p> <p>LinkedIn group: "IP Inclusive: IP Non-traditional Family Network" https://www.linkedin.com/groups/12523213/</p> <p>Blogsite: https://nontraditionalfamilies.blog/</p> <p>Email: IPnontraditionalfamilies@gmail.com</p>
IP Out	<p>Website: https://ipinclusive.org.uk/community/ip-out/</p> <p>LinkedIn group: "IP Out Network" https://linkedin.com/groups/8488373</p>

	Twitter:	@ip_out
	Email:	IPOutNetwork@gmail.com
Women in IP	Website:	https://ipinclusive.org.uk/community/women-in-ip/
	LinkedIn group:	"IP Inclusive : Women in IP" https://linkedin.com/groups/8557958
	Twitter:	@WomeninIPI
	Email:	womeninipnetwork@gmail.com
Careers in Ideas	Website:	https://careersinideas.org.uk/ (see also https://ipinclusive.org.uk/careers-in-ideas/)
	LinkedIn group:	"Careers in Ideas" https://linkedin.com/groups/12376993/
	LinkedIn profile:	https://www.linkedin.com/company/careers-in-ideas-initiative/
	Twitter:	@CareersInIdeas
	Instagram:	"careersinideas" https://www.instagram.com/careersinideas/
	Email:	askcareersinideas@gmail.com
Regional networks	Website:	https://ipinclusive.org.uk/our-regional-edi-charter-networks/
	North of England:	https://www.linkedin.com/groups/8931689/ ipinclusivenoe@gmail.com
	Scotland:	https://www.linkedin.com/groups/9028398/ ipinclusivescotland@gmail.com
Mental Health First Aiders' Network	Website:	https://ipinclusive.org.uk/newsandfeatures/our-support-network-for-mental-health-first-aiders/
	LinkedIn group:	"IP Inclusive MHFAer Support Network" https://www.linkedin.com/groups/12424438/
The EDI Charter	Website:	https://ipinclusive.org.uk/about/our-charter/
	Email:	ipinclusivecharter@gmail.com
IP Inclusive Management (IPIM)	Website:	https://ipinclusive.org.uk/ip-inclusive-management/ ⁷³
	Chair:	Michael Silverleaf KC; msilverleaf@11southsquare.com
	Secretary:	Julia Florence; ipimsecretary@gmail.com
	Treasurer:	Gordon Harris; gordon.harris@gowlingwlg.com
	Lead Executive Officer:	Andrea Brewster; abrewsteripinclusive@gmail.com
	Written correspondence:	c/o CIPA, Halton House, 20-23 Holborn, London EC1N 2JD

⁷³ Note: this page also provides access to IP Inclusive's formal policies and procedures, as well as guidelines for people working under the IP Inclusive banner. These include our data protection and communications policies and our volunteers' code of conduct.

Advisory Board

Website: <https://ipinclusive.org.uk/the-ip-inclusive-advisory-board/>

Chair⁷⁴: Carol Arnold; please contact via the Advisory Board Secretary or our Lead Executive Officer

Secretary: Josh McLennon; jmclennon@kilburnstrode.com

⁷⁴ (From January 2023)