

IP Inclusive: LEO's report 1Q 2023



IPINCLUSIVE

Working for diversity and inclusion in IP

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1 General

This has been a busy quarter for events (many of them part of our ongoing *Inclusivity Unlocked!* programme) and for planning the Careers in Ideas *Summer of IP* campaign. We've also made significant progress reaching out to IP paralegals and strengthening our relationships with Charter signatories.

2 Careers in Ideas (CinI)

2.1 General

The work of the CinI task force has been focused on *Summer of IP* this quarter: see 2.2 below.

In addition:

- January: joint webinar with CIPA, “Enhancing diversity in the patent profession: how can I help?”, looking at how individual IP professionals can help young people access professional careers (eg through tutoring or mentoring)
 - Panellists included representatives from the social mobility charities Generating Genius, In2scienceUK and The Access Project, as well as patent attorneys who've worked with them
 - A write-up featured on our website News and Features page later in the month
- January: blog post by Sabine Rehaber from the Women in IP committee, about the diverse range of career opportunities and roles now available in IP; this was published on both the IP Inclusive and the Careers in Ideas websites
- March: guest post from In2scienceUK on the IP Inclusive website News and Features page, celebrating their collaborations with IP organisations
- We continued to develop closer ties with In2scienceUK, who will be helping us promote *Summer of IP* among currently under-represented student communities

2.2 *Summer of IP* campaign

Summer of IP is a programme of awareness-raising events and work experience/taster opportunities, some provided by CinI and some by individual IP sector employers whose contributions will be promoted centrally through CinI. It will run throughout July and August 2023.

A working group, of CinI task force members and other interested volunteers, was established in 4Q 2023 and is led by our Executive Support Helen Smith. It met on 31 January to progress plans.

- Guidelines finalised for participating organisations
- Several employer activities (including events and work experience opportunities) confirmed and ready to advertise on the *Summer of IP* webpage; others in the pipeline
- Plans progressing well for general and introductory CinI events, which will either run online in the early weeks of the campaign or be available as recordings; they include:
 - Introductions to types of IP and to the different career roles available in the sector

- Events about specific types of IP career, eg IP solicitor or barrister, IP paralegal, careers in patents, careers in trade marks, in-house roles
- An application skills “masterclass” about CVs, covering letters, interviews and the application process for patent and trade mark trainee roles (repeat of a Careers in Ideas Week 2020 event)

2.3 Mentoring Hub

- January: training and induction course for a third cohort of 12 mentors
- Current numbers of Mentoring Hub participants: 46 mentors and 51 mentees at the end of 1Q 2023

3 The EDI Charter

3.1 General

- Signatory changes during 1Q 2023:
 - Acquired 4 new signatories: Burley Law Limited, Protect TM, Associated British Foods plc’s IP department and Sagittarius IP
 - 1 signatory removed due to its acquisition by another, existing signatory
 - Leading to a total of 159 signatories
- During the quarter, 5 more signatories contributed to our 2022-23 fundraising campaign

3.2 The regional networks

- January: online get-together of regional network committees to discuss the role of the networks in the post-lockdown era and exchange ideas for future activities
 - All have noticed a reduced take-up for regional in-person events, as working patterns change post-Covid
 - We hope to strengthen the networks through collaborations with the IP Inclusive communities
 - They may have a particular value in supporting new entrants to the IP professions (in collaboration with IP Futures) and in regional careers outreach projects
 - They will also try to recruit more paralegals and business support professionals to their committees (see 7.4 below)
- January: Scotland Network hybrid “coffee morning” hosted by Murgitroyd in Glasgow and online, discussing unconscious bias
- February: small Midlands Network get-together, hosted by Marks & Clerk in Birmingham, to watch a live broadcast of the CIPA Informals/Jonathan’s Voice evening webinar “Looking at Perfection and Imposter Syndrome”

Sadly, towards the end of March, Midlands Network co-leads Jennifer Unsworth and Lynne Jackson decided to step down. Huge credit and thanks go to both of them for the work they’ve done in establishing and running the network. We will try to find a successor and keep the network’s

existence and role under review. We will also look into alternative ways of reaching IP Inclusive supporters and Charter signatories outside London.

3.3 Outreach meetings

In March we embarked on a programme of small, informal meetings with groups of Charter signatories, particularly those who are currently less involved with IP Inclusive, to talk about opportunities for collaboration. We aimed to increase engagement and improve our value to signatories of all types and sizes.

The first three meetings were held with law firm signatories and involved Gordon Harris from IPIM, our Administrative Support Anne Burgato and me. They yielded useful information about IP Inclusive's value to law firms and hopefully strengthened our relationships with them, as well as allowing us to promote projects such as *Summer of IP* and request specific types of help such as event hosting, speaker provision or funding.

A recurring theme was IP Inclusive's value to more junior professionals, thanks to the cross-sector networking opportunities it offers.

The outreach meetings also gave us a chance to update Charter signatory contact details and to ensure our comms are getting through to the right people. More law firm meetings are scheduled for 2Q 2023 and we are hoping to begin meeting with in-house signatories in the near future.

4 The six communities

4.1 IP & ME

- January: informal dinner in London to mark the Lunar New Year
- Online coffee dates scheduled for April and May 2023
- Committee structure streamlined during 1Q 2023, to make it easier for committee members to generate and pursue their own ideas, supported by a small "leadership team" comprising the current committee co-leads and working group leads

4.2 IP Ability

- March: "Online, but not forgotten" – joint webinar with CIPA about online accessibility and assistive technology, in particular for disabled (including neurodivergent) users
- Future events being planned:
 - With contacts from the Department for Work and Pensions, about the government's "Disability Confident" and "Access to Work" schemes; this will also involve panellists from Disability Confident-certified organisations
 - With Microlink plc about workplace adjustments, accessibility, assistive technology and the business case for building more accessible workplaces and recruiting more inclusively
 - A series of neurodiversity-themed "coffee date" discussions, probably hybrid events

- “Fireside chat”-style events, again probably hybrid, in which neurodivergent IP professionals will share their experiences and ideas for improving inclusivity
- The updated version of IP Ability’s 2019 launch survey was kept open until the end of February and yielded 55 responses; the committee are analysing the results and hope to report soon
- March: website News and Features post to mark Neurodiversity Celebration Week, flagging the planned neurodiversity events
- See also our work on (peri)menopause support (5.2 below)

4.3 IP Futures

- February: panel discussion “Thrown into the deep end - Finally qualified, what now?”, about the transition from trainee to newly-qualified professional
 - Hybrid event, hosted by HGF in London and online
 - Had to be postponed by a couple of weeks due to rail strikes on the original date

4.4 IP Non-traditional Family Network

- Nothing to report this quarter

4.5 IP Out

- February: social event at Zodiac bar in London, with free karaoke and dancing
- January & February: website News and Features posts:
 - Reporting on the November 2022 “Queer identities and faith experiences” event
 - About recent controversy around transgender rights, with guidance for allies and a statement of IP Out’s (and IP Inclusive’s) support for trans people; this post generated positive comments on both the website and LinkedIn
- March: committee co-lead Darren Smyth and I met with Jae Sloan from Proud Science Alliance:
 - They are keen to work more closely with us to promote one another’s initiatives
 - They will involve us in their work to support LGBTQ+ families
 - Jae agreed to provide a webinar for IP Out on gender identity and expression

4.6 Women in IP

- March: LinkedIn and Twitter posts to mark International Women’s Day and its 2023 #EmbraceEquity theme
- March: online coffee date with discussions hosted by several individual volunteers, about inclusive work cultures where women’s careers can thrive and their achievements are celebrated
 - These also explored how #EmbracingEquity plays into inclusive and supportive career development opportunities
- January & March: website News and Features posts by committee member Sabine Rehber about increasingly diverse career opportunities in the IP professions (see 2.1 above) and how to integrate new roles inclusively

- Initial plans to focus this year’s activities on the issues women can face at each stage of their career and the support necessary to overcome them; the committee hope to host an initial round-table for senior women in IP, to be followed by further consultations as a basis for other 2023 events
- See also our work on (peri)menopause support (5.2 below)

5 Resources

5.1 *Inclusivity Unlocked!*

Inclusivity Unlocked! is a programme of events and associated resources to support organisations as they emerge from the Covid-19 lockdowns.

Events in 1Q 2023:

- January: “(Office) space: the final frontier?” – webinar about workspace design post-Covid
- February: “Rainmaking for everyone” – webinar about how the Covid-19 lockdowns have helped us find more inclusive approaches to business development
- March: “Online, but not forgotten” – joint IP Ability and CIPA webinar about online accessibility (see 4.2 above)
- March: “Menopause: what’s changing?” – webinar with Lauren Chiren from Women of a Certain Stage, discussing recent changes to perceptions of (peri)menopause and to workplace support for colleagues who are going through it
- March: “Too busy to flourish?” – joint webinar with LawCare about working practices and cultures that support mental wellbeing and benefit from lessons learned during lockdown
- March: plans progressing for a webinar specifically for IP paralegals (joint project with Jonathan’s Voice)

During 1Q 2023 we also published reports of the first three of these webinars, along with practical “top tips” for the first two presented as easily-digested slides for organisations, individual IP professionals and managers. The recordings for all five are also available via our website.

The full *Inclusivity Unlocked!* programme is available online and updated on a rolling basis, as is the compilation of “top tips”. We also have a survey open for supporters to suggest additional event topics and formats.

5.2 (Peri)menopause support

A small group of volunteers has been working in 4Q 2022 and 1Q 2023 to provide:

- LinkedIn and WhatsApp groups for IP professionals to discuss issues to do with the (peri)menopause
- A series of informal online “coffee dates”

- The first ran in February, with no specific discussion theme, and proved very popular (over 50 attendees); lively and candid breakout room chats covered a range of menopause-related issues
- The second is planned for mid-April, on the theme of “symptoms, treatments and coping strategies”
- A compilation of sources of information, support and ideas, intended as a “living” document with regular updates to reflect knowledge and experiences shared within the IP Inclusive community; this is available on the website resources page
- A webinar as part of the *Inclusivity Unlocked!* series (see 5.1 above)
- A website News and Features post introducing these initiatives, including a brief report from the February coffee date

This recent focus on (peri)menopause support began in response to popular demand and has been well received among people of all ages and genders and in a range of roles (in particular helping us reach more paralegals and business support professionals). There appears to be enthusiasm for us to continue providing activities and support, and appreciation that IP Inclusive is tackling this topic.

5.3 Other resources

During 1Q 2023 we published 7 new resources, including the (peri)menopause support document and 6 webinar recordings (in one case with speaker follow-up materials).

We also published 5 website News and Features posts featuring practical tips and supporting resources from IP Inclusive events, for example the *Inclusivity Unlocked!* webinars. Further posts provided guidance for trans allies from IP Out (see 4.5 above) and on inclusivity issues surrounding the creation of new roles in an organisation (4.6 above).

6 Mental health and wellbeing

- January: a free CITMA webinar on managing workplace stress was open to all IP Inclusive supporters and advertised on our website events page
- February: I attended a LawCare round-table on men’s mental health, with Richard Wells from our Mental Health First Aiders’ Network
 - By way of follow-up, Richard and I began organising an IP Inclusive round-table on the same subject, in collaboration with Jonathan’s Voice; it will take place in May and explore a possible men’s network and/or other forms of mental wellbeing support for men in IP
- March: two-day online mental health first aid course from Illuminate VR, provided at a discounted fee for IP Inclusive supporters
- March: *Inclusivity Unlocked!* webinar with LawCare, about working cultures and their impact on mental health
- Helen Smith, alongside volunteers from our Advisory Board, continued to work with Jonathan’s Voice on an updated version of our website mental health and wellbeing page

- We have also been working with Jonathan’s Voice on a series of joint webinars during 2023, covering issues such as conversations on mental health, mindfulness at work, imposter syndrome and perfectionism, male suicide, and menopause, as well as an event (see 7.2 below) specifically for IP paralegals
- Our (peri)menopause support work is also likely to have value in improving mental wellbeing in the IP professions

7 Extending our reach

7.1 Senior leaders’ diversity think tank

- January: third “Pledge Prattle” meeting (an informal online drop-in forum for Senior Leaders’ Pledge signatories and their senior HR and management colleagues), discussing modern-day EDI policies and their implementation
- February: plenary think tank meeting with guest speakers from the IP Federation, about what corporate clients are looking for, in EDI terms, from their outside counsel
 - Currently working on follow-up, including a potential sector-wide basic standard for EDI data gathering
- March: fourth Pledge Prattle, discussing internal EDI forums, who’s involved in them, what they do and how they communicate with the rest of the firm

7.2 IP paralegals

- Involvement in (peri)menopause coffee date (see 5.2 above)
- Events being organised:
 - Joint webinar with Jonathan’s Voice on mental wellbeing for IP paralegals as working arrangements change in the wake of the Covid-19 lockdowns (this will be part of the *Inclusivity Unlocked!* series)
 - *Summer of IP* event (see 2.2 above) about careers as an IP paralegal

7.3 Business support professionals

- February: I met with the IP Practice Directors Group (IPPDG), alongside IPReg’s Chief Executive Fran Gillon, for an informal discussion about enhancing EDI in the patent and trade mark professions and why it matters
- As usual, a large number of business support professionals from patent and trade mark practices were involved in the Pledge Prattle discussions (see 7.1 above)
- The *Inclusivity Unlocked!* events continue to attract business support professionals, who in some cases contribute as speakers and/or organisers (in particular the January webinar on workspace design, organised with the IPPDG)

7.4 Other

- Charter signatory outreach meetings (see 3.3 above)

- The regional networks will try to recruit more paralegals and business support professionals to their committees, in order to reach those parts of the IP Inclusive community and ensure their regional events and associated resources are appropriately tailored

8 Operational

8.1 IPIM

In early January IPIM launched a campaign to recruit one or two new members, in particular to replace Julia Florence (who will step down at the 18 April AGM) but also to broaden perspectives and assist with succession planning. The vacancies were advertised on our website, in our update newsletters and via our social media feeds, the application window closing on 28 February.

We attracted a strong field of seven candidates, from which, at the end of March, we invited four to join the IPIM team: Ese Akpogheneta (BAT), Robert Andrews (Mewburn Ellis), Clair Curran (Reckitt) and Lesley Evans (University of Gloucestershire, formerly Haseltine Lake Kempner). All have since accepted. Their appointments will be confirmed at the AGM.

Also on the IPIM front:

- January: 2022 Annual Report and Financial Report published¹
- March: IPIM liability insurance renewed; no change to level of cover
- Meetings held on 25 January and 21 March
 - The January meeting also involved Carol Arnold, the new Advisory Board Chair (see 8.2 below)
 - The March meeting agreed the new appointments, planned for the April annual meeting and agreed processes for the 2023-24 business plan and budget

8.2 Advisory Board

- January: Carol Arnold succeeded Ben Buchanan as Chair for 2023
- January: Carol joined an IPIM meeting to discuss Advisory Board/IPIM interactions and general plans for 2023
 - Explored various ways of working and generating agenda items
 - Agreed that (i) joint IPIM/Advisory Board meetings (two a year) should be longer than in 2022; (ii) an IPIM member could attend at the start of Board meetings if appropriate to provide briefings on questions put to the Board; (iii) smaller ad hoc working groups could be set up within the Board to provide advice or assistance on specific issues if necessary
 - Ways of working, and discussion themes, will be revisited in 3Q 2023

¹ See <https://ipinclusive.org.uk/newsandfeatures/our-2022-annual-report/>

- February: I attended an Advisory Board meeting to answer questions and discuss the Board’s role and interactions with IPIM and the executive team; members also provided initial suggestions for the 2023-24 business plan
- March: I met with Carol Arnold to discuss more detailed plans for a joint Advisory Board/IPIM meeting in 2Q 2023 and for Advisory Board input into the business plan
 - Based on the Board’s input, alongside that from the April annual meeting, I will provide a rough draft business plan in time for the 2Q 2023 joint meeting, with a view to publishing a formal plan by the end of June
- A working group is currently developing a “skills matrix” to summarise Advisory Board members’ areas of expertise and interest

8.3 Executive staff

8.3.1 Lead Executive Officer (LEO)

- Work done during 1Q 2023 included in particular:
 - Completing and publishing the 2022 Annual Report
 - Managing and supporting our employees (see 8.3.2 below)
 - Overseeing *Summer of IP* preparations and the *Inclusivity Unlocked!* programme as well as the work of the new (peri)menopause support group and potential new men’s mental wellbeing network
 - Charter signatory outreach meetings
 - Projects involving IP paralegals
 - Recruitment of new IPIM members
 - Preparing for the 2023 annual meeting
 - Initial work with the Advisory Board on the 2023-24 business plan

8.3.2 Administrative support

Anne Burgato and Helen Smith continue to be a valuable source of assistance, both in administrative matters and also more generally for IP Inclusive’s comms, event organisation and project management.

- Anne also now provides secretarial support to IPIM, in particular the preparation of meeting minutes, and has played a key role in our Charter outreach campaign (see 3.3 above) in coordinating, documenting and contributing to meetings as well as processing resultant updates to our database of Charter signatory contacts; she also continues to handle administrative (including financial) aspects of our day-to-day operations, and general supporter enquiries.
- Helen has taken the lead on many aspects of the *Summer of IP* campaign; helped with event organisation and resource collation for the (peri)menopause support group; produced our fortnightly newsletters; generated reports and associated “top tips” for the *Inclusivity Unlocked!* events; and assisted Jonathan’s Voice on updating our website mental health and wellbeing page.

I held six-month reviews with both in March; these yielded positive feedback all round. In particular our flexible working arrangements have been working well on both sides: Anne and Helen can change their exact hours, by agreement, to accommodate eg childcare and other personal arrangements, as well as to accommodate IP Inclusive activities and events. This has proved particularly valuable during school holidays, for which we agreed that employees could either take extra unpaid leave, or work more during term-time and take time off in lieu during the holidays, to help them manage childcare.

8.3.3 Intern

Clifford Chance have kindly offered another of their LIFT interns; they will fund a four-week internship with us for one of their future trainees. We have received a short-list of three interested candidates and will interview two of them after Easter before making our selection.

We will likely ask the intern to help with the Careers in Ideas *Summer of IP* campaign, and potentially with a directory of IP Inclusive resources and/or EDI data gathering standards (see 7.1 above). We will also task them with general comms and event organisation, as we did Susan Nelson last year.

The internship timing is for us to agree with the successful candidate. Clifford Chance will provide office space and equipment for them, if necessary, as the role will need to be carried out virtually as in 2022.

8.4 Websites

- 13 “News and Features” posts published on the IP Inclusive website during 1Q 2023, including IP Inclusive news, event reports, guest blogs and comment
- One news post on the Careers in Ideas website during the same period, about increasingly diverse career opportunities in the IP professions
- Added 7 items to our website resources page in 1Q 2023: see 5.3 above
- March: minor change to the CMS editor for the IP Inclusive site, to allow us to alter the colours of post titles to improve their readability over background images

8.5 Financial

- Bank account balance at 31 March 2023 = £59,930.37
 - £11,000 of this is a ring-fenced contingency fund
- Fundraising campaign, to cover the 2022-23 business plan:
 - £51,750 of the £80,000 target raised by the end of 1Q 2023
 - Our thanks to IPReg for contributing £2,500 towards our 2022-23 operating costs (which they have helped to fund for the last few years)
- Key expenditure during 1Q 2023 included:
 - Operational items (renewal of insurance, SurveyMonkey subscription and data protection registration)
 - Payroll (salaries and PAYE tax): total during 1Q 2023 = £4,159.98
 - Lead Executive Officer fees and expenses: total during 1Q 2023 = £7,307.69

- HMRC enquiry fee protection purchased, through our accountants Haines Watts, for the year beginning 1 April 2023
- Financial year end 31 March 2023; we will be working with Haines Watts to complete the necessary reporting requirements

8.6 Other

- February: ICO data protection fee paid for 2023
- March: SurveyMonkey account renewed
- March: Zoom Pro account renewed
 - I pay for this account but make it available for IP Inclusive business as well as my own
- Plans progressing for the 18 April 2023 annual meeting, which as usual will include updates from the IP Inclusive communities and networks plus breakout discussions on our 2023-24 priorities and plans
 - The meeting is open to all UK-based IP professionals; representatives from key IP sector organisations have been personally invited
 - The 2023-24 business plan and budget will be prepared during 2Q 2023, based on stakeholder input at the annual meeting and Advisory Board recommendations

9 Miscellaneous

- March: I attended, by invitation, CIPA's New President's Reception
 - Several other IPIM members and IP Inclusive community representatives were also present, along with representatives of other IP sector organisations
 - New President Daniel Chew spoke of his intention to prioritise EDI during his year of office; we hope to work with him on that

ARB

12 April 2023