

# IP Inclusive: LEO's report 3Q 2023

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**IP INCLUSIVE**

Working for diversity and inclusion in IP

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## 1 General

This summer was busier than in previous years due to our *Summer of IP* outreach campaign, organised through Careers in Ideas. It was labour-intensive but well worth the effort.

We also launched our new business plan and this year's fundraising campaign. We're now starting work on the objectives we committed to. That will involve working with IP Inclusive supporters across all our communities, networks and working groups and it will, we hope, kindle fresh enthusiasm and bring in more volunteers and ideas. As of September, our executive team has expanded its capacity, which will be vital for the exciting work we have planned.

## 2 Careers in Ideas

### 2.1 *Summer of IP*

We launched our *Summer of IP*<sup>1</sup> campaign at the start of July and it occupied most of 3Q 2023 for the Careers in Ideas team. Some employer events were still running in mid-September (one is even scheduled for early October) but the campaign has now largely drawn to a close. It seems to have been a huge success, with pleasing attendance at our events, employer activities also generally well subscribed, and participants from a good range of backgrounds. Promoting the campaign has brought new contacts for Careers in Ideas, or built on existing ones, in universities and outreach charities and among IP sector recruiters.

- July:
  - Campaign launched 3 July, with news posts to mark the event on the IP Inclusive and Careers in Ideas websites.
  - 6 pre-recorded introductory events/talks made available to participants.
  - 7 live introductory events (mostly online) covered a range of specific roles and working environments (eg careers as an IP paralegal, working in-house, routes into IP solicitor/barrister careers) as well as how to access them; recordings are now available from all of these.
  - 10 employer activities and events, including “taster” events and open evenings, workshops, work experience placements and a mock hearing; venues included Birmingham, Cambridge, Hatfield, Liverpool, London, Manchester and online.
- August:
  - A further webinar, with the IPO, introducing IP careers in the public sector.
  - 12 employer activities and events, including taster days, workshops and work experience placements; venues included Edinburgh, London, Manchester, Marlow, Nottingham and online.

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

- September:
  - 6 employer activities and events, including in-person and virtual taster events, a workshop and a webinar; venues included London, Manchester and online; one event related specifically to patent secretarial and administrative careers.
  - Published 4 blog posts (on both the IP Inclusive and the Careers in Ideas websites) with participants' reports of their *Summer of IP* experiences, as part of an ongoing awareness-raising campaign; these will continue into 4Q 2023.
- During July and August we offered one-to-one online “coffee date” chats for 15 participants, with IP professionals in a range of roles.

During September we have been gathering feedback from both delegates and participating organisations. Most of it has been extremely positive and suggests the campaign could usefully be repeated in 2024, with a potentially wider reach. Participant feedback will help us to improve the effectiveness of future iterations.

Work on *Summer of IP* has been led by our Executive Support Helen Smith and me, with help from other members of the Careers in Ideas task force.

## 2.2 Mentoring Hub

*Summer of IP* generated a good number of new mentee requests. A waiting list has been established via the Mentorloop platform that supports the hub and we now need to recruit and train a new cohort of mentors to cope with demand.

At the end of 3Q 2023 we had 46 mentors and 54 mentees registered with the hub. Since its inception, 82 participants have been matched for mentoring. Our “mentoring quality score” is an excellent 4.81 out of 5 – well above the Mentorloop benchmark of 4.2.

## 3 The EDI Charter

### 3.1 General

- Signatory changes during 3Q 2023:
  - One new signatory: IP21
  - One signatory stepped down because it was no longer operating in the IP sector
  - One was removed due to its failure to supply up to date contact details
  - Leading to a total of 155 signatories
- During the quarter, 10 signatories contributed to our 2023-24 fundraising campaign.

### 3.2 The regional networks

An in-person Birmingham event is being organised for November, which we hope will bring together supporters in the region and provide a springboard for invigorating the (temporarily parked) Midlands Network. It will be promoted in partnership with IP & ME.

Anne and I are also planning a programme of regional events, in collaboration with the regional networks, communities and locally-based Charter signatories, as part of our work on the 2023-25 business plan objectives: see 7 below. These will focus on allyship and be either in-person or preferably hybrid, allowing the educational and awareness-raising elements to be recorded and disseminated as allyship resources for the wider community whilst also providing networking opportunities.

### **3.3 Outreach meetings**

The last of our law firm outreach meetings (small informal online discussions) took place in July. Again it yielded positive and useful input. As a result of personal connections established with their representatives during the meetings, we have had a more favourable response from law firms to this year's fundraising campaign than in 2022.

We plan to organise a similar series of outreach meetings for in-house department signatories during 4Q 2023. This should coincide with The IP Federation's launch of a tailored version of our Senior Leaders' Pledge. We will also work with The IP Federation to encourage more in-house Charter signatories.

## **4 The five communities**

### **4.1 General**

In September we held an online get-together for the communities' committee leads. It was a useful forum for updating on one another's activities and plans, exchanging ideas, and discussing collaboration on the 2023-25 business plan (in particular events and resources on allyship). We hope to repeat this plenary catch-up at roughly six-month intervals from now on, to facilitate coordination between, and collaboration on, different communities' projects.

### **4.2 IP & ME**

- July: online "Coffee Club" discussion on the theme of "What, if any, impact has your background and culture had on your career or career choices?"
- July/August: a series of podcasts for South Asian Heritage Month, in which IP & ME committee members interviewed IP professionals about what their South Asian backgrounds meant to them personally and to their careers.
  - This was followed up with a website News and Features post in September, summarising the podcast links and related resources.
- September: collaboration with Women in IP on the "Patent Pathways" webinar (see 4.6 below).
- September: online "Coffee Club" discussion on the theme of "Autumn's arrival: celebrating the changing of seasons".

Towards the end of the quarter, Monifa Phillips stepped down as a co-lead of the IP & ME committee. We are grateful to her for the huge amounts of energy and enthusiasm she put into

restructuring the committee over the last year or so, as well as into organising individual projects and events.

#### 4.3 IP Ability

- July: website News and Features post reporting on the June “How to be Disability Confident – and why it matters” webinar.
- Work being done throughout 3Q 2023 to restructure and revitalise the committee, in light of a survey of existing committee members at the end of 2Q 2023.
- See also our work on (peri)menopause support (5.2 below).

#### 4.4 IP Futures

- An in-person event discussing the difference between working in-house and in private practice was originally scheduled for 25 July; due to rail strikes this has been rescheduled for 1 November.

#### 4.5 IP Out

- September: social get-together at *The Pen and Pencil* in Manchester.
- A hybrid event on asexuality, with a paid speaker, has been scheduled for late November:
  - This was originally planned for early October but postponed due to rail strikes.
  - The speaker fee will be met from the donation that IP Out received in June from Triona Desmond.
- Other events are already being planned for 4Q 2023 and the first half of 2024.

#### 4.6 Women in IP

- Joanna Conway and Susi Fish have announced their intention to step down as committee co-leads. Their replacement(s) will be confirmed shortly.
- August/September: campaign to recruit new committee members.
  - Had yielded 16 potential recruits by the end of September.
  - Meeting planned for early October to meet these candidates, discuss their areas of interest, and hopefully establish new working groups within the committee to progress specific projects and ongoing tasks.
- September: webinar with IP & ME about the US-based “Patent Pathways” initiative to increase ethnic and gender diversity among patent professionals.
- See also our work on (peri)menopause support (5.2 below).

## 5 Resources

### 5.1 General

- Published 3 new resources during 3Q 2023: two webinar recordings plus a summary of the *Summer of IP* introductory events and recordings.
- Also published 3 website News and Features posts featuring practical tips and supporting resources from IP Inclusive events.

- Further posts provided content relating to South Asian Heritage Month (see 4.2 above) and data from an IP sector workforce survey.

## 5.2 (Peri)menopause support

- September: working group meeting to coordinate future activities.
- September: resources compilation updated with signposts to new external menopause-related content.
- Activities and events in the pipeline:
  - A joint webinar with Jonathan’s Voice in October, to mark World Menopause Day
  - Further informal coffee dates with specific themes and/or speakers, including on maintaining a healthy lifestyle during (peri)menopause
  - An online webinar/workshop to bust the myths that surround (peri)menopause
  - A webinar on legal aspects of menopause inclusivity in the workplace, “reasonable adjustments” and employers’ obligations
  - Publishing menopause “stories”: short recordings of individual IP professionals sharing their experiences and suggestions on aspects of the (peri)menopause
  - Potentially facilitating “menopause champion” training for IP professionals, ideally beginning with one or two working group members who can then provide a webinar on the subject to the wider IP Inclusive community
- The LinkedIn and WhatsApp groups continue to generate *ad hoc* conversations between IP professionals on issues relating to the (peri)menopause.

## 6 Mental health & wellbeing

- Joint webinars with Jonathan’s Voice:
  - July: “What’s it like to be us?”, about mental wellbeing for IP paralegals and business support professionals, based on the new Jonathan’s Voice guide published soon afterwards.
  - September: “Male suicide – Myths, Action, Hope”, to mark World Suicide Prevention Day.
  - Others planned for October (to mark World Menopause Day), December (on stress and anxiety) and January (on procrastination).
- September: website News and Features post reporting on the “Male suicide” webinar
- Worked with Jonathan’s Voice, throughout 3Q 2023, to follow up on the May round-table on men’s mental wellbeing:
  - Currently unlikely to be sufficient support for a dedicated Men in IP support group.
  - However, we’re planning a speaker/panel event in 4Q 2023 to discuss related issues and allow for in-person networking.
- Also continued to work with Jonathan’s Voice on an updated version of our website mental health and wellbeing page.

- Our (peri)menopause support work (see 5.2 above) is also likely to have value in improving mental wellbeing in the IP professions.

## 7 Business planning & strategic objectives

- Business plan for 2023-25 and budget for 2023-24 published 24 July 2023<sup>2</sup>.
- Key features of the plan include:
  - “Allyship” as the theme underpinning all areas of work
  - The provision of more in-person, or at least hybrid, events (including in the regions)
  - Encouraging and supporting inclusive, accessible hybrid working arrangements
  - Increased support and networking opportunities for early-career IP professionals
  - Gathering, and helping IP sector businesses to gather, data to assess EDI levels in the IP professions, IP Inclusive’s impact, and areas in need of future work
  - Continued efforts, through Careers in Ideas, to attract a more diverse pool of recruits and widen access to the IP professions
  - A two-year business plan, although with annual budgeting
  - Some longer-term strategic planning, with associated consultation among our stakeholders
- September: meeting of the full executive team (Anne, Helen and me) to discuss progressing the business plan objectives:
  - Anne will begin coordinating a programme of regional events, in particular on allyship and related themes, incorporating opportunities for early-career IP professionals where possible.
  - She will also organise a survey to establish where our regional supporters are based and how best to support them.
  - Helen will begin work on (a) an EDI “starter pack” for new recruits and (b) collated guidance on allyship (working with the communities and incorporating outcomes from relevant events).
  - She will also continue to drive much of the (peri)menopause support work and the Careers in Ideas outreach work, including the hoped-for upgrade of the Careers in Ideas website.
- September: plenary meeting of community committee leads (see 4.1 above) discussed joint activities to promote and facilitate allyship.

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<sup>2</sup> See <https://ipinclusive.org.uk/newsandfeatures/guiding-us-through-the-next-twelve-months/>



## 8 Operational

### 8.1 IPIM

- Meeting held on 27 September (jointly with the Advisory Board: see 8.2 below).

### 8.2 Advisory Board

- Meeting held on 13 July:
  - Provided final input on the draft business plan.
  - Also discussed the process for appointing new members in collaboration with IPIM.
- Later in July, Sally Bannan was appointed to the Advisory Board.
  - Sally brings a link to the epi's D&I working group.
  - Board membership now up to 26, as at its inception.
- Meeting held on 27 September, jointly with IPIM:
  - Hosted as a hybrid event by Kilburn & Strode.
  - New member Sally Bannan spoke about opportunities for collaboration with the epi's D&I working group.
  - Discussions also covered (i) the succession planning process for Advisory Board members and (ii) ways in which Board members can assist with delivering on the business plan objectives.
  - Main meeting followed by informal in-person networking, including the chance for IPIM and Advisory Board members to talk with Anne Burgato and Helen Smith.

### 8.3 Executive staff

#### 8.3.1 Lead Executive Officer (LEO)

- Work done during 3Q 2023 included in particular:
  - Completing and publishing the 2023-25 business plan and 2023-24 budget, in consultation with IPIM and the Advisory Board
  - Launching and overseeing the 2023-24 fundraising campaign
  - Coordinating and promoting the Careers in Ideas *Summer of IP* campaign, including associated website and social media comms and follow-up activities
  - With Helen and Anne, planning projects and our respective roles for delivering on the 2023-25 business plan
  - Meetings with IP Inclusive stakeholders, including Charter signatory outreach meetings (see 3.3 above), the community leaders' get-together (4.1 above) and the September "Pledge Prattle" (9.1 below)
  - Overseeing the creation of new events, including with ChIPs (9.2 below), Jonathan's Voice (6 above) and the IP Inclusive Midlands Network (3.2 above)
  - Responding to the IPReg business plan and budget consultation (9.3 below)
  - Preparing talks for the CIPA Paralegals' Conference in October and more generally on allyship and related subjects (for addition to the IP Inclusive resources)
  - Alongside Anne, instigating improvements to our online systems (8.4 below)
  - Managing and supporting our employees

### 8.3.2 *Executive support*

- Anne Burgato and Helen Smith continue to provide valuable assistance, not only to the LEO but also, increasingly, to other parts of the IP Inclusive community.
- Both will continue to support ongoing IP Inclusive activities, and in addition be involved with delivering on the new business plan objectives: see 7 above.
- Twelve-month reviews with each of them in September yielded positive feedback on all sides and enthusiasm for the future development of their roles.
- Anne’s hours increased from 8 to 16 a week with effect from 1 September 2023.
  - Her usual working hours will be Monday to Wednesday 10 am to 2 pm, Thursday 9.15 am to 1.15 pm but with a reasonable amount of flexibility on both sides.
  - Her new job title is Executive Support (as Helen’s).
  - We have set up an auto-enrolment pension scheme through the government’s NEST scheme, as necessitated by her higher salary; this is now being administered by our accountants Haines Watts as part of the payroll management service.
- Anne, Helen and I met in-person for the first time over lunch in London on 27 September; we also all attended the joint IPIM/Advisory Board meeting that afternoon so as to meet and chat with other key IP Inclusive people.

### 8.3.3 *Intern*

- Ayaan Ali completed her 4-week internship with us (see my report for 2Q 2023) on 7 July.
- Towards the end she gave a presentation to members of the Careers in Ideas task force, the Advisory Board and IPIM, regarding her work with IP Inclusive.
- She also wrote a blog post about her internship, which was published on our website News and Features page in early July.
- Her input had proved very helpful in promoting *Summer of IP* and building new contacts for Careers in Ideas; overall it was a successful internship and Ayaan appeared to be pleased with what she had learnt.

## 8.4 **Websites & social media**

- 13 News and Features posts published on the IP Inclusive website during 3Q 2023, including IP Inclusive news, event reports, guest blogs and comment, as well as blog posts from *Summer of IP* participants (see 2.1 above).
- 6 news posts on the Careers in Ideas website during the same period, one to mark the launch of *Summer of IP* and the others reproducing the subsequent participants’ reports.
- 3 items added to our website resources page in 3Q 2023 (see 5.1 above).
- Formal ownership of the ipinclusive.org.uk domain name registration (formerly held by CIPA on trust for IPIM) was transferred to our Ionos account in July, along with “Domain Guard” protection.
- Our new Ionos domain name registrations include dedicated @ipinclusive.org.uk and @careersinideas.org.uk email addresses and associated online storage.
  - During 4Q 2023 we will transition our general supporter correspondence, event comms and Charter signatory comms to the new addresses.

- This also applies to internal executive staff comms.
- The new email accounts are accessed and administered via webmail.
- For the time being we will continue to use shared Google drives for document storage.
- July: IP Inclusive company page established on LinkedIn (<https://www.linkedin.com/company/98183780/>):
  - The page already has over 280 followers and is generating a reasonable level of activity (shares, likes, etc – plus tags from other organisations’ posts).
  - We now publish our fortnightly newsletters on the page as well as circulating them via the Mailchimp mailing lists.
  - The page has been useful for other important announcements, eg regarding *Summer of IP*, events, our new business plan and our 2023-24 fundraising campaign.
- During 3Q 2023, with help from Advisory Board member Pete Fellows, we began reviewing our website hosting and maintenance arrangements and looking into more cost-effective and responsive alternatives; a new provider will likely be appointed to create and host an intended new Careers in Ideas website.

## 8.5 Financial

- Bank account balance at 30 September 2023 = £49,899.90
  - £13,000 of this is a ring-fenced contingency fund.
- Fundraising campaign, to cover our 2023-24 activities, launched in August:
  - Requests sent by email to Charter signatory contacts and also mentioned in our regular newsletters.
  - £18,000.00 of the £88,000 target raised by the end of 3Q 2023.
  - A JustGiving page has also been created for individual donations; so far this has only raised £100.
- Key expenditure during 3Q 2023 included:
  - Salaries (including pension contributions): £5,123.90
  - Lead Executive Officer fees and expenses: £8,132.85 (of which travel expenses = £132.85)
- RBS “community” bank account identified as a suitable alternative to IPIM’s existing account, which is held with Lloyds and administered by the CITMA executive team.
  - We will begin the application process early in 4Q 2023, once all requisite IPIM member details have been collated.

## 8.6 Other

- In August IP Inclusive stepped down as a Tech Talent Charter<sup>3</sup> signatory.
  - Our current plans mean we are unlikely ever to employ significant numbers of – if any – people in tech roles; the Charter therefore appears not to be hugely relevant to us despite the TTC’s enthusiasm for our signing up in 2019.

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<sup>3</sup> See <https://www.techtalentcharter.co.uk/home>

- Signature carried no cost but did require annual submission of staff diversity data.
- I will be meeting with the TTC CEO, Debbie Forster, in October to discuss alternative ways for the two organisations to promote one another's work.
- During August and September, suppliers, online account details and policy documents were updated for the change in CIPA's address, which is IPIM's official registered address.

## 9 Miscellaneous

### 9.1 Senior leaders' diversity think tank

- September: sixth "Pledge Prattle" meeting (an informal online drop-in forum for Senior Leaders' Pledge signatories and their senior HR and management colleagues):
  - The theme was "Your EDI shop window", ie what an organisation's website and corporate comms say about its EDI credentials, who and what they showcase and how they can be used to attract a wider range of recruits.
- Working with think tank co-lead Gwilym Roberts on a late 2023 event with representatives from the UK IPO, EPO, EUIPO, WIPO and USPTO regarding IP offices' approaches to EDI; this will be open to the wider IP Inclusive community.

### 9.2 External publications & events

- July: website News and Features post reporting on the joint IP Inclusive and CITMA webinar I spoke at in June on "How to create an EDI strategy for lasting change".
- I contributed an article about allyship, "Avoiding the mouse trap", to the September *CITMA Review*.
- I continue to contribute monthly IP Inclusive updates for the *CIPA Journal*.
- During 3Q 2023 I collaborated with the London chapter of ChIPs<sup>4</sup> on an in-person London event, "All rise! – Diversity in the Patents Court", discussing recent changes to the Patents Court Guide and their impact on the diversity pipeline.
  - The event will feature input from Judge Meade and ChIPs representatives involved in lobbying for the changes.
  - Originally scheduled for 27 September; postponed to 27 November in order to increase numbers and speaker availability.
  - Should help raise our profile among IP solicitors, barristers, clerks and judges.
- I've been invited to speak at CIPA's Life Sciences Conference in November, to provide an update on IP Inclusive activities.

### 9.3 Lobbying & influence

- August: responded to IPReg's July 2023 consultation on its 2024/25 business plan, budget and practising fees.
  - Response prepared with input from our IP Ability and Women in IP communities.

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<sup>4</sup> See <https://chipsnetwork.org/>

- Supported most of the proposed plans, many likely to improve diversity in, and access to, the regulated sector – including projects relating to education and training, access and barriers to entry to the patent profession, IPReg’s competency framework, accreditation of training providers and alternative routes of entry.
- Urged IPReg to update its 2021 diversity survey as soon as possible, as a better basis for future equality impact assessments; to inform and evaluate its future work; and as a benchmark for other IP sector organisations and their clients.
- Delighted to note that IPReg’s “not in active practice” fee category now extends to adoption and other types of parental (not just maternity) leave; we lobbied for this more gender-balanced approach in our responses to the corresponding 2021 and 2022 consultations.
- Also pleased to see the broad-scope discretionary fee waiver continued, again as we’ve advocated for in the past; this should help reduce negative impacts on particular groups due to IPReg’s proposed fee increases.
- August: attended, by invitation, a meeting with IPReg as part of their forthcoming review of barriers to entry to the patent profession; we also discussed education-related projects referred to in their draft business plan.

ARB

6 October 2023