



IP INCLUSIVE

Working for diversity and inclusion in IP

Annual Report 2023

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IP Inclusive Annual Report 2023

2023: Evolution and heritage

Foreword by Andrea Brewster OBE

Events in this last year have served to remind us of IP Inclusive’s heritage: how it began, what drives its development, and why it works so well.

You could see it as a setback that our regional networks have been less active and the Midlands one temporarily “parked”, or that our IP Non-traditional Family Network has wound down because its leaders felt it no longer had a role as a formal IP Inclusive community. Equally, you could see these things as a healthy part of the initiative’s growth. Our networks are set up and driven by the people they support; if the need for them changes, we adapt in response.

And as we rein back activities in some areas, we have seen expansion in others. Our (peri)menopause group, started tentatively in late 2022, has gone from strength to strength. During 2023 it provided events, resources and support for menopause inclusivity, opening new forums for long-neglected conversations. As with much of our work, this group tapped into a perceived need and became a focus for people to work together on something that really mattered to them.

Nor have we lost the regional networks or our non-traditional family members’ forum for good. Their creators remain involved and continue to support and champion the people they represent. The five remaining communities have seen significant increases in follower and subscriber numbers, as has IP Inclusive more generally. While some committee leads have stepped down – for example in IP & ME and Women in IP – others have arrived to take up the baton, bringing new ideas and vitality. It is always sad when people we have worked closely with move on, but exciting to meet the next generation of EDI flag-bearers. Recruiting four new people to our governing body IP Inclusive Management (IPIM) has also introduced fresh energy and perspectives.

2023 saw the second half of our popular *Inclusivity Unlocked!* programme, with events and resources to help organisations build back more inclusively after the Covid-19 lockdowns. Another highlight was our *Summer of IP* outreach campaign, organised through Careers in Ideas, which attracted valuable new recruits – many of whom would not otherwise have heard of IP or had the confidence to apply – and new contacts among their advisers. I am hugely proud of the warm and inclusive welcome our supporters gave to the participants, and the insights they provided into IP careers. Our sector will benefit from those investments. And again, *Summer of IP* succeeded because

employers stepped up to the plate together. IP Inclusive simply channelled their enthusiasm so as to amplify their individual contributions.

I have always maintained that IP Inclusive is not a thing as such; it is a catalyst. It provides a nucleus around which IP professionals can gather to collaborate on the EDI-related issues that affect them, a mechanism for both coordinating and empowering their responses to those issues. It follows that as IP professionals' priorities change, so too must IP Inclusive's. We should not shy away from these things. Instead we must allow ourselves to learn from the things our supporters are saying and doing. Which is why we've begun a survey to understand more about EDI support for IP professionals outside London, and why we'll continue to consult with signatories to ensure our Charter scheme delivers value and meaning.

IP Inclusive owes its existence, its development and its strength to volunteers. But of course, we also need to support those volunteers as they grow in number and their work becomes wider-reaching. So in September 2023 we expanded the capacity of our executive team, allowing us to embark on our new two-year business plan with confidence. That plan has a strong focus on allyship. It too will involve 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.

For now, I would like to thank everyone who was involved in our 2023 work: our donors, event hosts and partner organisations; our executive and management team; our Advisory Board and hundreds of other volunteers. Let us continue to listen to one another, to accommodate, to adapt. Let us start difficult conversations. Let us be bold about pruning back in some parts to strengthen growth in others, about welcoming new volunteers as others take a step back. And let us continue to facilitate change rather than fear it – because that is why we exist.

We are driven by what our sector needs. There may come a time when it no longer needs IP Inclusive and our work is done. That's OK. But it is not that time yet.

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

1 Our strategic objectives

In the first half of 2023 we continued to focus on the high-level objectives from our 2022-23 business plan¹: (i) improving our engagement with, and support for, our Charter signatories; (ii) diversifying the recruitment pipeline; (iii) widening participation in IP Inclusive; and (iv) developing the support and resources we provide and improving their accessibility.

In the second half of the year we began working to our new business plan², this one covering a two-year period from August 2023 to July 2025. It is shaped by the following objectives:

1. Allyship
 - Encouraging and empowering allies throughout the IP professions
2. Inclusive hybrid working arrangements
 - Encouraging and supporting inclusive, accessible hybrid working arrangements post-Covid
3. In-person events and networking opportunities
 - Improving opportunities for our supporters to build their personal and professional networks
4. Support for early-career IP professionals
 - Increasing support and networking opportunities for recent entrants to the IP professions
5. Data gathering
 - Gathering – and helping IP sector businesses to gather – data to assess equality, diversity and inclusion (EDI) levels in the IP professions, IP Inclusive’s impact, and areas in need of future work
6. Diversifying the upstream pipeline
 - Continuing, through Careers in Ideas, our efforts to attract a more diverse pool of recruits and widen access to the IP professions

As in the preceding year, the general theme of allyship (objective 1) is intended to underpin our work in all areas.

This report describes the specific things we did during 2023 to pursue the above objectives. There is more about the 2023-25 business plan at 9.4 below.

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

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

2 Diversifying the upstream pipeline (Careers in Ideas)

2.1 General

Careers in Ideas³ is IP Inclusive’s outreach initiative, designed to raise awareness of IP-related careers, encourage recruits from a larger range of backgrounds and widen access to the IP professions.

The “task force” that runs the initiative focused most of its 2023 work on a new *Summer of IP* campaign. This proved incredibly successful and we are hoping to repeat it in 2024: see 2.2 below.

A working group including both task force members and other interested volunteers met in January 2023 to plan for *Summer of IP*. It met again in October to review the outcomes of the campaign, begin planning the 2024 re-run and identify more general Careers in Ideas priorities for the coming year.

2.2 *Summer of IP*

2.2.1 General

Our 2023 *Summer of IP* campaign⁴ was a programme of awareness-raising events and work experience/taster opportunities, some provided by Careers in Ideas and some by IP sector employers. The latter were promoted centrally through Careers in Ideas, providing an umbrella under which, and contacts through which, the activities could be targeted to a wider audience.

The campaign launched officially on 3 July 2023 and ran throughout July and August, with some employer events still taking place in September and in one case early October.

2.2.2 Introductory events

The Careers in Ideas events that formed part one of *Summer of IP* were introductory in nature, raising awareness about IP generally and the careers available in the sector. Some were pre-made recordings; others ran during the early part of the campaign as either online or hybrid events (again, with recordings available afterwards). These events, and the resultant resources, are summarised on our website resources page⁵; they included:

- Introductions to types of IP, the associated career roles, the benefits of joining the IP professions and longer-term career planning.
- Events about specific types of IP career (eg IP solicitor or barrister, IP paralegal, careers in patents, careers in trade marks and in-house roles) and how to access them.

³ See <https://ipinclusive.org.uk/careers-in-ideas/> and <https://careersinideas.org.uk/>

⁴ See <https://ipinclusive.org.uk/careers-in-ideas/summer-of-ip-2023/>

⁵ See <https://ipinclusive.org.uk/resources/summer-of-ip-introductory-events-recordings/>

- An application skills “masterclass” about CVs, covering letters, interviews and the application process for patent and trade mark trainee roles (a repeat of a Careers in Ideas Week 2020 event).

In total, we ran seven introductory events and published six pre-recorded videos. Various IP sector organisations, including the UK Intellectual Property Office (IPO), helped to create, organise and/or host these.

2.2.3 Employer opportunities

Key to the campaign were the part two opportunities offered by IP sector employers. Although we provided guidelines and suggestions for participating organisations, the details of their activities and events were largely up to them. We encouraged them to cover a range of roles and to target would-be recruits from diverse backgrounds and levels.

Over the course of the summer there were 30 such opportunities for *Summer of IP* participants. They included “taster” events and open days, workshops, webinars and online discussions, work experience placements and a mock hearing. Some were held online but most in person, at locations including Birmingham, Cambridge, Edinburgh, Hatfield, Liverpool, London, Manchester, Marlow and Nottingham. As hoped, they embraced a mixture of IP sector roles including patent attorney, trade mark attorney, IP solicitor, IP barrister, IP Office or other public sector employee and business support professionals. There were in-house opportunities on offer as well as those in private sector firms.

During July and August we also offered one-to-one online “coffee date” chats for fifteen participants, with IP professionals in a range of roles. These were coordinated centrally through Careers in Ideas. A pleasingly high number of our supporters volunteered to participate, and feedback from the participants was hugely positive.

2.2.4 Summer of IP comms

Due to the limited editability of the current Careers in Ideas website (see 2.5.1 below), most of the publicity for, and administration of, *Summer of IP* was hosted on the IP Inclusive website. This content – which included a new dedicated *Summer of IP* page and another summarising the available employer opportunities – was signposted wherever feasible from the Careers in Ideas site. News posts to mark the 3 July launch, and to report on participants’ experiences, were published on both sites.

The campaign was also publicised on the Careers in Ideas LinkedIn page and its X and Instagram accounts, as well as through IP Inclusive’s social media channels.

Importantly, during June our temporary intern Ayaan Ali (see 10.4 below) helped us promote *Summer of IP* to potential recruits and their advisers. She wrote to a large number of university careers and “widening participation” departments, IP sector recruiters and outreach charities, who in turn helped to advertise the campaign among their own contacts. In particular we tried to target

universities with whom the IP sector has traditionally had fewer interactions, and those with a good record for diverse recruitment (based on the latest data from the Higher Education Statistics Agency (HESA)⁶). Many IP Inclusive supporters helped us to promote the campaign within their networks, the IPO distributing information via its own network of contacts in UK schools.

Ayaan created the content for these promotional activities, including for Instagram posts.

Following the campaign, we invited participants to submit blog posts about their *Summer of IP* experiences. We published these (seventeen in total) on both the Careers in Ideas and IP Inclusive websites throughout the autumn of 2023.

2.2.5 Evaluation and future plans

Feedback from both delegates and participating organisations has been consistently positive and suggests that *Summer of IP* could usefully be repeated in 2024.

Overall the campaign seems to have been a success, with pleasing attendance at our events, employer activities also generally well subscribed, and participants from a good range of backgrounds. It has brought new contacts for Careers in Ideas as well as building on existing ones.

A report of the campaign, prepared by our Executive Support Helen Smith, was published on the IP Inclusive website in December 2023⁷. It evaluates the effectiveness of *Summer of IP* in reaching the intended target audience and summarises the most important feedback. It also discusses potential improvements for the 2024 re-run: these include starting promotion earlier in the year; a launch event aimed at raising awareness of IP careers and *Summer of IP* among charities, social mobility organisations and university careers services; providing suggestions to help employers select attendees that fulfil the *Summer of IP* EDI-improving objectives; gathering more comprehensive student feedback both immediately after the campaign and further along their career journeys; and increasing yet further the number and diversity of employer-led opportunities, especially the hands-on activities such as workshops and work experience placements.

2.3 The Careers in Ideas Mentoring Hub

The Careers in Ideas Mentoring Hub⁸, launched in December 2021, continued in 2023 to bring together existing IP professionals and would-be recruits to the sector. It is designed to help higher and further education students navigate their way into IP-related careers, particularly if their relatives, friends and teachers are unable to provide the necessary insights.

The hub 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

⁶ See “Widening participation: UK Performance Indicators 2020/21” at <https://www.hesa.ac.uk/data-and-analysis/performance-indicators/widening-participation>

⁷ See <https://ipinclusive.org.uk/newsandfeatures/a-successful-summer-of-ip/>

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

⁹ See <https://mentorloop.com/>

to provide an appropriate degree of privacy and protection for all participants. The hub also 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 mentor training sessions.

In January 2023 we held a training and induction course for a new cohort of twelve mentors. This course continues to be delivered primarily by Careers in Ideas 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.

Perhaps inevitably, the *Summer of IP* campaign generated a good number of new mentee requests, so in 2024 we will likely seek to recruit and train a new cohort of mentors to cope with demand. In the meantime a waiting list has been established via Mentorloop.

In April we published a “News and Features” post about the Mentoring Hub on the IP Inclusive website. Written by Carol Nyahasha and first published in the *CITMA Review*, it discussed the benefits of mentoring both for mentees looking to access IP careers and for the professionals who help them.

By the start of 2024 the Mentoring Hub had 53 registered mentees and 46 mentors (the corresponding figures at the start of 2023 being 55 mentees and 35 mentors). Feedback from the scheme remains positive: our “mentoring quality score” is an excellent 4.5 out of 5 – above the Mentorloop benchmark of 4.2.

2.4 Other 2023 highlights

In January 2023 we ran a joint Careers in Ideas and CIPA webinar entitled “Enhancing diversity in the patent profession: how can I help?”. This looked at how individual IP professionals can help young people access professional careers, for example through tutoring, mentoring and other similar volunteering opportunities. Panellists included representatives from the social mobility charities Generating Genius, In2scienceUK and The Access Project, as well as patent attorneys who had worked with them.

Throughout the year we continued to work alongside In2scienceUK¹⁰, who helped us promote *Summer of IP* among currently under-represented student communities. This award-winning charity has formed valuable partnerships with several IP sector organisations through its links with Careers in Ideas.

¹⁰ See <https://in2scienceuk.org/>

IP Inclusive supporters also continued to work, often encouraged by Careers in Ideas, with other relevant charities and outreach groups, many of which are showcased in our directory for IP professionals¹¹.

2.5 Website, social media and comms

2.5.1 The Careers in Ideas website

Careers in Ideas has its own website at www.careersinideas.org.uk.

During 2023 we published 20 news posts on its news and events page¹². These included a guest post about increasingly diverse career opportunities in the IP professions, news about the *Summer of IP* campaign and seventeen reports from *Summer of IP* alumni about the events they attended (see 2.2.4 above).

In addition we published 3 event posts on that page, providing access to the *Summer of IP* events, and a summary of the campaign's introductory events on the site's resources page¹³. We also added two new "Ideas people" posts from IP professionals, as well as content relating to marketing careers in IP sector organisations.

The Careers in Ideas website 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. We therefore feel it no longer provides a sufficiently up-to-date shop window for the rapidly-expanding Careers in Ideas initiative. An upgrade has been on our wish-list for two years or so, but we again lacked the time and funds to progress it during 2023. Thanks to a generous donation from Haseltine Lake Kempner however, and the identification of a new, more cost-effective website services provider (see 12.2.3 below), we were finally able to embark, in 4Q 2023, on building a replacement website. This is being handled by VTS Web Services, assisted by a small working group from within the Careers in Ideas task force.

We hope that the new site, which should be ready for testing early in 2024, will be better structured, more accessible and user-friendly, easier to maintain and more versatile. It will also benefit from more up-to-date (and better supported) technical features. It will be created using WordPress, as is the IP Inclusive website, and designed to be similarly easy to use and edit; training will be provided for our executive team before launch. It should be ready as a platform for our 2024 *Summer of IP* campaign.

2.5.2 LinkedIn

The Careers in Ideas LinkedIn page, created in February 2022, went from strength to strength during 2023. At the start of 2024 it had 429 followers (204 at the start of 2023). During the year we used it

¹¹ See <https://ipinclusive.org.uk/resources/careers-in-ideas-directory-of-outreach-organisations/>

¹² See <https://careersinideas.org.uk/news-events-student/>

¹³ See <https://careersinideas.org.uk/resources/>

to flag relevant content from the Careers in Ideas and IP Inclusive websites, in particular for promoting *Summer of IP* and interacting with its participants and for strengthening our links with other organisations who are active in this space.

Our corresponding LinkedIn group had 119 members at the start of 2024 (112 at the start of 2023); this is more for IP professionals who are involved in outreach activities rather than the would-be recruits they target.

2.5.3 Other

We still post important Careers in Ideas updates on X, although as with IP Inclusive (see 12.3.1 below) the account now sees lower levels of activity than in 2022. We also used Instagram to promote *Summer of IP* content.

The X account (@CareersInIdeas) had 617 followers at the start of 2024, compared to 596 at the start of 2023. On Instagram @careersinideas had 76 followers at the start of 2024 (61 at the start of 2023).

The IP Inclusive website also featured 25 Careers in Ideas-related posts on its News and Features page in 2023:

- In January, (a) a report of the joint webinar with CIPA referred to at 2.4 above and (b) a blog post by Sabine Rehber from the Women in IP committee, about the diverse range of career opportunities and roles now available in IP.
- In March and November, guest posts from In2scienceUK with updates on their collaborations with IP sector organisations.
- In April, Carol Nyahasha’s article about the Careers in Ideas Mentoring Hub and the value of mentoring (see 2.3 above).
- In July, (a) an announcement about the *Summer of IP* launch and (b) our intern Ayaan Ali’s report of her work at IP Inclusive, which focused in particular on *Summer of IP*.
- In October, an update and call for volunteers from The Access Project.
- From September through to December, a series of seventeen “My Summer of IP” reports from campaign alumni (2.2.4 above).

2.6 Key contacts

The Careers in Ideas task force lead is Chris Burnett (Birkett Long). Its current members are: Julie Barrett (PurposiveStep Consulting); Carys-Beth Bello (Fellows and Associates); Andrea Brewster (IP Inclusive); Rebecca Brooks (Mewburn Ellis); Julie Browne (Shell); Anne Burgato (IP Inclusive); John Enser (CMS Cameron McKenna Nabarro Olswang); Pete Fellows (Fellows and Associates); Sally Lingjun Gao (Mathys & Squire); Joshua Green (Mishcon de Reya, formerly Kilburn & Strode); Thomas Hailes (Kilburn & Strode, formerly Beck Greener); Gordon Harris (Gowling WLG); Brenna Howley (Gill Jennings & Every); Jay Janusz (Boult Wade Tennant); Charlotte Jones (Viatrix and Royal Society of Chemistry Law Group); David Joo (Aon); Philip Lawrence (IPO); Alison Lawson (Zacco); Stephanie Learoyd; Joseph Letang (Dehns); Ayesha Malik; Anna Matthew (Powell Gilbert); Carol Nyahasha

(Kilburn & Strode, formerly Elkington & Fife); Natasha Perks (Abel + Imray); Monifa Phillips (Appleyard Lees); Matthew Philpott (IPO); Heather Scott (Gill Jennings & Every); Polly Shaw (Dehns); Cherry Shin (HGF); Helen Smith (IP Inclusive); Jo Spreckley (Marks & Clerk); Tess Waldron (Powell Gilbert); Sheila Wallace (Marks & Clerk); Rachael Ward (Gill Jennings & Every); Ellie Wilson (Mishcon de Reya); and Connor Yap (AstraZeneca, formerly Sagittarius IP).

The Mentoring Hub is run by Carol Nyahasha.

Work on *Summer of IP* is led by Andrea Brewster and Helen Smith from the IP Inclusive executive team, with help during June 2023 from our intern Ayaan Ali (see 10.4 below).

The website rebuild is being coordinated by a working group comprising Julie Barrett, Carys-Beth Bello, Andrea Brewster, Julie Browne, Anne Burgato, Pete Fellows, Gordon Harris, Matthew Philpott, Helen Smith and Rachael Ward.

The Careers in Ideas website content and social media accounts are managed by Andrea Brewster, Carol Nyahasha (LinkedIn), and Rebecca Brooks and Ayesha Malik (Instagram).

3 Our EDI Charter

3.1 General

Our EDI Charter scheme¹⁴ exists to promulgate 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 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 2023, twenty signatories had together contributed £46,125 to our 2023-24 fundraising campaign; six contributed to the 2022-23 fundraising campaign during the first half of 2023) and of other forms of support such as event hosting. Their involvement has been key to major projects such as our *Summer of IP* outreach campaign (see 2.2 above), which saw participation from eighteen Charter signatories and of individual IP professionals from many more.

During 2023 we acquired eight new Charter signatories: Burley Law Limited, IP21, John Gray IP Limited, OxFirst, Protect TM, Sagittarius IP and the in-house IP departments of Associated British Foods plc and Croda International plc.

Following data clean-up checks, seven signatories were removed from our database due to their failure to supply up-to-date contact details. One was removed due to its acquisition by another,

¹⁴ See <https://ipinclusive.org.uk/about/our-charter/>

existing signatory. One stepped down, for the time being at least, due to a need to focus on its wider EDI efforts as compared to those of its (proportionately small) IP team, and another because it was no longer operating in the IP sector.

The remaining signatories (155 at the start of 2024) 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 IPO. All are listed on our website¹⁵.

Many of our Charter signatories have representatives on the senior leaders' diversity think tank (see 7.4 below) and/or who have signed our Senior Leaders' Pledge (3.5 below); this helps us to build more effective relationships with our community of signatories.

3.2 The regional networks

3.2.1 General

Our regional networks¹⁶ provide opportunities for signatories from specific areas of the country 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.

Each regional network has its own section in the IP Inclusive mailing list, allowing it to target updates and invitations to relevant people. These sections included, at the start of 2024, 73 subscribers for the Midlands Network, 110 for the North of England, 84 for Scotland and 140 for the South West (compared with 42, 70, 56 and 112 respectively at the start of 2023). The North of England Network has its own email address, YouTube channel and LinkedIn group, of which the latter had 67 members at the start of 2024 (60 at the start of 2023). The Scotland Network's LinkedIn group, established in early 2021, had 58 members (52 at the start of 2023).

The regional networks were all established well before the Covid-19 lockdowns. As businesses return to more flexible and hybrid working arrangements, their roles and support bases have inevitably been changing, and 2023 brought uncertainty for them. In January, we held an 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 said they had noticed a reduced take-up for regional in-person events. Potential solutions discussed included greater collaboration with the IP Inclusive communities, a stronger focus on supporting new entrants to the IP professions, involvement in regional careers outreach projects, and recruiting more paralegals and business support professionals to their committees to widen their engagement in local organisations. These ideas were incorporated into our 2023-25 business plan (see 9.4 below), along with relevant feedback

¹⁵ See <https://ipinclusive.org.uk/about/charter-signatories/>

¹⁶ See <https://ipinclusive.org.uk/our-regional-edi-charter-networks/>

from our 2023 annual meeting. They will be supplemented by input from our regional supporters' survey (3.2.4 below).

3.2.2 Scotland Network

Our Scotland Network appears to enjoy the strongest level of support at the moment. During 2023 it organised two events, the first being a hybrid "coffee morning" focused on unconscious bias, which was hosted by Murgitroyd in Glasgow and online. The second, an in-person discussion about the individual professional's role in creating effective hybrid working arrangements, was scheduled for November but unfortunately had to be postponed due to train strike-related travel issues. It will now run in mid-January 2024, hosted as originally intended by Marks & Clerk in Edinburgh.

3.2.3 Midlands Network

The Midlands Network began 2023 with a small February get-together, hosted by Marks & Clerk in Birmingham, to watch a live broadcast of the CIPA Informals/Jonathan's Voice webinar "Looking at Perfection and Imposter Syndrome".

Sadly, towards the end of March, its co-leads Lynne Jackson and Jennifer Unsworth decided to step down. As yet we have been unable to find replacements and in 2Q 2023 we took the difficult decision to "park" the network temporarily.

Despite this, a small group of locally-based supporters and IP & ME members attempted to organise an in-person Birmingham event for November, which we had hoped would provide a springboard for invigorating the Midlands Network. Unfortunately this had to be postponed due to insufficient sign-ups. We hope to reschedule it at some point in 2024, potentially at a more popular time; its theme of inclusive corporate catering aligns well with our focus on allyship and as such could form part of the programme of allyship-related events discussed at 3.2.5 below.

3.2.4 Regional supporters' survey

There is clearly a need to rethink how IP Inclusive supports people outside London from here on. In late November 2023 we launched a survey to establish how many supporters we have in each region and the types of EDI events and resources they would find useful.

The survey is open to all of our supporters and has been promoted through all our available communications channels. It will remain open until mid-January 2024 and, in collaboration with the regional network committees, we will use the results to organise better-tailored content for its respondents.

3.2.5 Allyship events programme

As part of our 2023-25 focus on allyship, we have begun planning a programme of allyship-related events during 2024. We hope to run at least some of those in the regions. They will have a hybrid format, allowing the educational and awareness-raising elements to be recorded and disseminated as allyship resources for the wider community whilst also providing networking opportunities.

Naturally, we will use the results of the survey described at 3.2.4 above to help shape their content, format, location and timings. Our regional networks, communities and locally-based Charter signatories will also be closely involved.

3.3 Outreach meetings

In March 2023 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. Our aim was to increase engagement and improve our value to signatories of all types and sizes. We believe it has been a very positive initiative.

The meetings were held during 1Q and 2Q 2023 with law firm signatories; they involved Andrea Brewster and Anne Burgato from the executive team and Gordon Harris from IP Inclusive Management (IPIM). The discussions revealed wide support for IP Inclusive and, typically, a desire to engage more closely. They also yielded useful information about IP Inclusive’s value to law firms, as well as new contacts and a better understanding of how to communicate with them. On the administrative side they were an excellent opportunity to update Charter signatory contact details.

Recurring themes from the discussions were (a) IP Inclusive’s value to more junior professionals, thanks to the cross-sector networking opportunities it offers, and (b) its potential for bringing IP professionals together in regional hubs to share ideas and best practices. This feedback was incorporated into our 2023-25 business plan (see 9.4 below).

Through these outreach efforts we were also able to promote specific projects – including *Summer of IP*, for which the meetings generated additional hands-on support – and to request other types of help such as event hosting, speaker provision or funding. We believe that 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.

Having met now with a good proportion of our law firm signatories, we are hoping to continue the exercise into 2024 by meeting with both current and potential in-house signatories. This should coincide with The IP Federation’s launch of a tailored version of our Senior Leaders’ Pledge (see 3.5.3 below) and a drive – also in collaboration with The IP Federation – to encourage more in-house Charter signatories.

3.4 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 their Charter commitments. In particular the 2022-23 *Inclusivity Unlocked!* campaign was designed to help organisations tackle EDI-related issues as they emerged from the pandemic: see 5.2 below. The “Pledge Prattle” forum (3.5.2 below) also provides opportunities for senior professionals in signatory organisations to share ideas and best practices, and to collaborate to improve standards across the sector.

There is more information about the IP Inclusive resources at 5 below.

Throughout the year we continued to update the Charter signatories’ “designated EDI officers” on our work, roughly fortnightly, through our mailing list. With a larger executive team and armed with feedback from the outreach meetings discussed above, we are now able to keep our Charter database more up-to-date and to issue more targeted communications to signatory contacts.

3.5 The Senior Leaders’ Pledge

3.5.1 General

The IP Inclusive Senior Leaders’ Pledge¹⁷ was introduced in July 2021 by our senior leaders’ diversity think tank (see 7.4 below), to encourage visible championing of EDI at the highest levels of our Charter signatory organisations.

It is a personal rather than organisational scheme and involves eight 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, at the same time strengthening our engagement with them.

At the start of 2024 there were 114 signatories to the Senior Leaders’ Pledge, compared to 96 at the start of 2023.

3.5.2 The “Pledge Prattle” forum

Our informal online “Pledge Prattle” discussions allow Senior Leaders’ Pledge signatories and their senior HR and management colleagues to share experiences regarding specific aspects of the pledge and its implementation. These half-hour drop-in gatherings (which are not recorded) have proved both popular and candid. The first two were held during 4Q 2022; in 2023 we ran four more:

- In January to discuss modern-day EDI policies and their implementation.
- In March to discuss internal EDI forums, who is involved in them, what they do and how they communicate with the rest of the organisation.
- In May about parental leave provisions.
- In September on the theme “Your EDI shop window”, covering 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.

The May discussions were particularly wide-ranging, extending to (i) other types of long-term leave/sabbatical or flexible working arrangements, for example to accommodate caring responsibilities, to allow someone to pursue an outside interest or learning opportunity, or simply for a break; (ii) support for those who return from an extended period of leave; and (iii) the handling of their workloads in their absence.

¹⁷ See <https://ipinclusive.org.uk/the-ip-inclusive-senior-leaders-pledge/>

3.5.3 In-house version

During 2023 we continued to work with The IP Federation on a version of the Senior Leaders' Pledge tailored for in-house department heads. Its roll-out is currently being planned for 1Q 2024; this is later than originally hoped but will be combined with in-house-focused Charter signatory outreach meetings (see 3.3 above) and a drive to increase take-up of the Charter itself among in-house IP departments.

3.6 Charter signatories' survey

In 2022 we surveyed our signatories about our impact on, and value to, the sector. This information was used as the basis for a formal impact report later the same year. The survey also provided an opportunity for signatories to confirm the six Charter commitments and to update their contact details if necessary.

We hope to repeat this exercise in 2024. This should help us to maintain effective communications with, and a good understanding of, our community of Charter signatories, and ensure they engage meaningfully with the Charter scheme. Ultimately we would like to establish a (light-touch) annual process for this form of consultation, providing a mechanism for signatories to account for and share their EDI activities and to contribute to IP Inclusive's plans.

3.7 Key contacts

The EDI Charter work is coordinated by Andrea Brewster, with help from our Executive Support Anne Burgato. Anne is responsible for administering the scheme, maintaining records and communicating with signatories.

The Scotland Network is led by Laurence Cheney (Murgitroyd), Rachel Gillan (CMS Cameron McKenna Nabarro Olswang), Margaret Hastie (Murgitroyd) and David Blair (SGMA Limited, formerly AA Thornton). Its 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.

As discussed at 3.2.3 above, the Midlands Network has been "parked" for the time being. We hope to revive it during 2024, depending of course on the feedback from our regional supporters' survey (3.2.4 above). In the meantime we would like to express our sincere thanks to previous Midlands Network co-leads Lynne Jackson and Jennifer Unsworth, who stepped down in 1Q 2023. They put incredible amounts of hard work and energy into establishing and running the network for us.

The committee members for the other regional networks are currently:

- 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).

- South West: Susan Antoine (Haseltine Lake Kempner); Laurie Bray (Withers & Rogers); Caroline Day (Haseltine Lake Kempner); Megan Jefferies (Thrings; committee lead); Jonny Lerwill (Airbus Defence & Space); Jim Pearson (Abel + Imray).

4 Networking and support communities

4.1 General

We currently have five networking and support communities¹⁸. Each organises its own social, training and awareness-raising events, and publishes 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 get involved. 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, recognising the many intersections between the experiences of their respective members. All five will be closely involved in our 2024 work on allyship (see 1 and 3.2.5 above and 9.4 below).

Sadly, this year saw the closure of the most recent of our communities, the IP Non-traditional Family Network. The community’s co-founders nevertheless remain involved in the drive to support the people for whom it was originally set up: see 4.5 below. The remaining five communities have continued to organise events and provide support for IP professionals in a range of under-represented groups, including those previously involved in the IP Non-traditional Family Network.

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

4.2.1 General

IP & ME¹⁹ is our community for IP professionals from minority ethnic backgrounds, and their allies.

At the start of 2024 it had 531 subscribers to its mailing list, 401 followers on X (@ipinclusiveIPME) and 133 members in its LinkedIn group (these figures at the start of 2023 were 478, 414 and 125

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

¹⁹ See <https://ipinclusive.org.uk/community/ip-me/>

respectively), as well as 682 followers (204 the previous year) and 500+ connections for its LinkedIn profile page.

4.2.2 Events

During 2023 the IP & ME committee organised informal online “Coffee Club” discussions in April, May, June, July and September. These covered a range of discussion themes including “If you could create a new national holiday in the UK, what would it be?”; “How does the ethnic diversity in IP compare to your previous work/studies outside of IP?”; “Can you share a memory of being immersed in, or learning about, your culture?”; and “What, if any, impact has your background and culture had on your career or career choices?”. Also discussed were the cultural highlights of favourite holiday destinations, IP organisations’ efforts to improve ethnic diversity and inclusion and “Autumn’s arrival: celebrating the changing of seasons”.

The Coffee Club remains a popular way of bringing together both IP professionals from minority ethnic backgrounds and their allies, and of raising awareness of the issues they face.

Other IP & ME events in 2023 were:

- In January, an informal dinner in London to mark the Lunar New Year.
- In May, attendance by IP & ME committee members at “Pint of Science” festival events in Birmingham, Bradford and Manchester; supporters were invited to join them for informal talks and socialising.
- In September, a collaboration with Women in IP on the “Patent Pathways” webinar (see 4.7.2 below).

IP & ME also worked with the Midlands Network on a November in-person event (see 3.2.3 above), which has since been postponed into 2024 due to low sign-up numbers.

4.2.3 Other 2023 highlights

In July and August, IP & ME produced a mini-series of podcasts to celebrate South Asian Heritage Month, in which 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.

4.2.4 Committee matters

The IP & ME committee structure was streamlined during 1Q 2023. The new structure made it easier for committee members to generate and pursue their own ideas, supported by a small “leadership team” comprising the committee co-leads and various working group leads.

During 3Q 2023, Cass Dottridge, Josh McLennon and Monifa Phillips stepped down as co-leads of the committee. We are grateful to them for the huge amounts of energy and enthusiasm they put into leading the committee over the last two years, as well as into organising individual projects and events. They were fantastic ambassadors for the community and for IP Inclusive more generally. They are succeeded by Lianne Da-Cunha, Beatrice Malacart and Riddhi Patel.

4.2.5 The IP Inclusive AskME directory

We had hoped to launch our new “AskME” directory in 2023. Intended to improve the visibility of minority ethnic professionals in the IP sector, this resource will be hosted on the IP Inclusive website and will allow “customers” such as publishers, editors and event organisers to search a free 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.

We felt we needed an initial set of directory entries before promoting it more widely, but unfortunately – despite much enthusiasm at the outset of the project – we have thus far been unable to recruit sufficient numbers of volunteers. This, combined with delays introduced by the website developers and other ongoing commitments for members of the AskME team at IP Inclusive, has unfortunately meant that the project was put on hold during 2023. With the help of the new committee co-leads, we will attempt to revive it in 2024.

4.2.6 Key contacts

Cass Dottridge (Cargill), Josh McLennon (Håmsø Patentbyrå AS, formerly Kilburn & Strode) and Monifa Phillips (Appleyard Lees) served as committee co-leads until autumn 2023. The current co-leads are Lianne Da-Cunha (Forresters), Beatrice Malacart (Forresters) and Riddhi Patel (Appleyard Lees). Other IP Inclusive supporters assist on an *ad hoc* basis with individual projects and events.

4.3 IP Ability

4.3.1 General

IP Ability²⁰ 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 2024, IP Ability had 176 subscribers to its mailing list, 277 followers on X (@IP_Ability), 127 members in its LinkedIn group and 15 members in its Facebook group (these figures at the start of 2023 were 104, 278, 116 and 14 respectively).

4.3.2 Events

IP Ability’s 2023 events were:

- In March, “Online, but not forgotten”, a joint webinar with CIPA about online accessibility and assistive technology, in particular for disabled – including neurodivergent – users. This was part of our *Inclusivity Unlocked!* programme (see 5.2 below).

²⁰ See <https://ipinclusive.org.uk/community/ip-ability/>

- In June, a webinar on “How to be Disability Confident – and why it matters”, in which a speaker from the Department for Work and Pensions explained the government’s “Disability Confident” and “Access to Work” schemes, followed by a panel discussion with IP professionals from Disability Confident-certified organisations (including the IPO).
- In December, “Beyond labels: challenging the stigma of ‘disabled’”, a webinar to mark International Day of Persons with Disabilities and Disability Awareness Month, discussing societal stigma associated with the terms “disabled” and “disability”.

Over the coming months, IP Ability is also hoping to instigate a series of informal neurodiversity-themed “coffee date” discussions, probably as hybrid events. Also in the pipeline are (i) “fireside chat”-style events, again probably hybrid, in which neurodivergent IP professionals share their experiences and ideas for improving inclusivity, and (ii) a webinar on the Carer’s Leave Act 2023.

4.3.3 Resources and awareness-raising

IP Ability continued to raise awareness and educate in other ways, in particular by creating content for the IP Inclusive website. Relevant posts on our News and Features page included:

- In March, to mark Neurodiversity Celebration Week, updates on planned future events on neurodiversity-related themes.
- Also in March, a report of the March webinar on online accessibility.
- In May, two guest posts:
 - For Deaf Awareness Week, with personal experiences of hearing loss from an IP professional.
 - From Chris Naylor at Bnode, as a follow-up to his talk at the March webinar “Online, but not forgotten”, with guidance on complying with disability legislation around the world.
- In July, a report from the June “How to be Disability Confident – and why it matters” webinar.

In June, we published “top tips” from the online accessibility webinar.

Our news posts and resources relating to (peri)menopause are also potentially relevant to the IP Ability community: see 5.3 below.

4.3.4 Other 2023 highlights

Open from December 2022 until the end of February 2023, an updated version of IP Ability’s 2019 launch survey yielded 55 responses. The purpose of re-running the survey was to explore how things have changed in the IP sector for disabled people and carers, and what further support IP Ability can provide. The committee are using the results to inform their plans from here on.

4.3.5 Committee matters

During 3Q 2023, the IP Ability committee was restructured in light of a survey of its existing members. The new structure should make it easier for the community to provide targeted events

and resources in high priority areas. Those who stepped down from formal committee membership at that time have offered to remain available for consultation on topics of personal relevance.

4.3.6 Key contacts

The current members of the IP Ability core committee are Victoria Barker (Finnegan); Chris Clarke (Vectura); Marianne Privett (AA Thornton); Barbara Rigby (Boult Wade Tennant); and Francesca Rivers (Cancer Research Horizons).

The content committee members are currently Victoria Barker; Caelia Bryn-Jacobsen (Kilburn & Strode); Becky Campbell (formerly Mewburn Ellis); Loreta Dimech-Mencattelli (Marks & Clerk); Stephanie Jackson (HGF); Marianne Privett; Megan Rannard (Marks & Clerk); Barbara Rigby; and Alex Vowinckel (CMS Cameron McKenna Nabarro Olswang).

The committee leads are Chris Clarke and Marianne Privett.

4.4 IP Futures

4.4.1 General

IP Futures²¹ is our community for early-career IP professionals. We define “early-career” loosely as meaning the first five or six years or so in the IP professions.

At the start of 2024, IP Futures had 281 subscribers to its mailing list and 235 members in its LinkedIn group (these figures at the start of 2023 were 172 and 118 respectively). It also had 354 connections through its LinkedIn profile page (336 at the start of 2023), with 547 followers (438 at the start of 2023).

4.4.2 2023 highlights

During 2023 the IP Futures committee organised two in-person events that provided opportunities for more junior IP professionals to build and develop their networks. Rail strikes meant both had to be rescheduled before coming to fruition, but neither of them disappointed.

In February, a panel discussion “Thrown into the deep end - Finally qualified, what now?” covered the transition from trainee to newly-qualified professional. This was a hybrid event, hosted by HGF in London and online.

The second, originally organised for July but actually running in early November, was an in-person event discussing the differences between working in-house and in private practice. It was hosted by Finnegan Europe in London.

Members of the IP Futures committee also continue to be involved in the work of the Careers in Ideas task force (see 2 above).

²¹ See <https://ipinclusive.org.uk/community/ip-futures/>

4.4.3 Key contacts

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

The committee lead during most of 2023 was Sanam Habib. Sanam is now on maternity leave and Fionnuala Richardson took up the role towards the end of the year.

4.5 IP Non-traditional Family Network

The IP Non-traditional Family Network²² was created for IP professionals in solo parent, blended, adoptive, LGBTQ+ and other non-traditional families, as well as their allies.

During 2Q 2023, the network wound down as a formal IP Inclusive community, having decided that the support it provided could now be better offered on a more *ad hoc* basis. The committee co-leads Sarah Phillips (then Abel + Imray), Janine Swarbrick (HGF) and Julian Crump (Abel + Imray) will continue to be involved with IP Inclusive and to contribute to our events, resources and lobbying work on issues of relevance to solo parents and other non-traditional families. They will also continue to work with our remaining communities where appropriate. All three have said they would be happy to hear from IP professionals in non-traditional families with suggestions and requests for support; the network's LinkedIn group will remain open for this purpose.

The network had hoped to run a final informal "park meet" in Bristol in June 2023. Sadly, that had to be cancelled because of the British summer weather. Previous park meets had been organised in collaboration with IP Inclusive's regional networks and the CIPA Informals; we hope that similar gatherings will be possible in the not-too-distant future.

In the meantime we would like to offer our heartfelt thanks to Sarah, Janine and Julian, and to Steph Bartley (also then Abel + Imray), for setting up the network in 2021, organising so many events and contributing to IP Inclusive projects, in particular through the Covid lockdowns.

4.6 IP Out

4.6.1 General

IP Out²³ is our community for LGBTQ+ IP professionals and their allies.

At the start of 2024 its LinkedIn group, "IP Out Network", had 208 members. It had 329 followers on X (@ip_out) and 641 subscribers to its mailing list. (These figures at the start of 2023 were 182, 318 and 600 respectively.)

²² See <https://ipinclusive.org.uk/community/ip-non-traditional-family-network/>

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

4.6.2 Events

As has become its custom, IP Out put on a mixture of educational and social events during 2023. All were either in-person or hybrid. They included:

- In February, a social event at the *Zodiac* bar in London, with free karaoke and dancing.
- In May, a webinar with Jae Sloan from the Proud Science Alliance entitled “Introduction to gender identity and expression”.
- In July, an invitation from Crystal from *RuPaul’s Drag Race UK* (who hosted IP Out’s 2022 quiz evening) to a party to celebrate London Pride, with a 20% discount on tickets for IP Out supporters.
- In September, a social get-together at *The Pen and Pencil* in Manchester.
- In November, a hybrid event on asexuality, with speaker Sarah Cosgriff from Aces in STEM. (This event had originally been scheduled for early October but had been postponed due to rail strikes.)

4.6.3 Other 2023 highlights

Several of our website News and Features posts raised awareness of IP Out’s work, in particular reports of its November 2022 “Queer identities and faith experiences” event and May 2023 webinar on gender identity and expression.

A particularly popular post, published in February, explored recent controversy around transgender rights, with guidance for allies and a statement of IP Out’s (and IP Inclusive’s) support for trans people. Written by several of the IP Out committee members, this post generated positive comments on both the website and LinkedIn. It was also shared again on social media during Transgender Awareness Week in November.

In March, committee co-lead Darren Smyth and Andrea Brewster met with Jae Sloan from Proud Science Alliance. They were keen to work more closely with us to promote one another’s initiatives and IP Out continued to collaborate with them in 2023, in particular over events to mark Pride Month in June. Jae also provided, for free, IP Out’s May webinar on gender identity.

In June IP Out received an £800 donation from committee member Triona Desmond, which it will allocate to appropriate projects, for example to cover external speaker fees at its events and/or charitable donations. The speaker fee for its November event on asexuality was met from this donation.

4.6.4 Key contacts

The current IP Out committee members are Isobel Barry (Carpmaels & Ransford; co-chair); Becky Campbell (IP Ability liaison); Triona Desmond (Pinsent Masons; LinkedIn director); Georgina Hart (Wiggin LLP; co-secretary); Charlie Hilton-Balfe (Appleyard Lees; CIPA Informals liaison); Tom Leonard (Kilburn & Strode); Robin de Meyere (Hoffmann Eitle; communications director); Kevin Rich (Potter Clarkson; co-secretary); Ari Rollason (Haseltine Lake Kempner; email director); Eden Sarid

(Essex Law School; X director); Al Skilton (IPO); and Darren Smyth (EIP; co-chair and IP Inclusive liaison).

Jonny Lerwill (Airbus Defence & Space) stepped down from the committee in September 2023. Charlie Hilton-Balfe and Ari Rollason joined it later in 4Q 2023.

The committee co-chairs are Isobel Barry and Darren Smyth. Isobel succeeded Tom Leonard when committee roles changed at the end of 2023.

4.7 Women in IP

4.7.1 General

Women in IP²⁴ is our community focussing on issues that can predominantly affect women in the IP professions. It is open to people of all genders.

At the start of 2024 it had 1,088 subscribers to its mailing list, 655 followers on X (@WomeninIPI) and 1,796 members in its LinkedIn group, compared to 1,016, 655 and 1,679 respectively at the start of 2023.

4.7.2 Events

Women in IP's 2023 activities were focused on supporting women throughout their IP careers. During the year it ran three events:

- In March, an online coffee date about inclusive work cultures where women's careers can thrive and their achievements are celebrated. These discussions also explored how the International Women's Day theme of #EmbracingEquity plays into inclusive and supportive career development opportunities.
- In September, a webinar with IP & ME about the US-based "Patent Pathways" initiative to increase ethnic and gender diversity among patent professionals.
- In December, an online coffee date about self-promotion – what works, what doesn't, the difference it can make and how to maintain your authenticity while doing it.

Each of the coffee dates comprised small discussion groups hosted by individual volunteers. They were coordinated by Michelle Montgomery (Carpmaels & Ransford) and Wendy Peet (Procter & Gamble).

The community also collaborated with AIPLA for their Women in IP global networking evening in April; this year's UK events took place in-person in Leeds, London and Manchester and were hosted with the help of Women in IP committee members. Their theme was "Own your voice", an encouragement for women to fill up their space and speak up their roles in the IP professions.

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

4.7.3 Other 2023 highlights

Other 2023 achievements for the Women in IP community included:

- In January and March, website News and Features posts by committee member Sabine Rehaber about increasingly diverse career opportunities in the IP professions and how to integrate new roles inclusively.
- In March, LinkedIn and X posts to mark International Women’s Day and its 2023 #EmbracingEquity theme.

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 page²⁵.

The work of the (peri)menopause support group (see 5.3 below) is also expected to have value to members and supporters of the Women in IP community.

4.7.4 Committee matters

During the summer of 2023, Women in IP co-leads Joanna Conway and Susi Fish announced their intention to step down. We are incredibly grateful for the hard work they have put into running the community over the past few years, and grateful that both will remain on the Women in IP committee and contribute to its future work. They were succeeded by Lucy Coe, an existing committee member, who assumed responsibility in October 2023.

In conjunction with these changes, Women in IP launched a summer campaign to recruit additional committee members. Sixteen new volunteers joined the team, which has now been restructured to include a main, coordinating committee and five smaller focus groups to work – both independently and in collaboration – on mentoring; events; coffee dates; socials (including content and resources); and career guidance.

The committee and focus groups are already planning events for 2024, starting with a “Connected Bubbles” networking event on 1 February in cities all over the UK. The mentoring focus group are also hoping to launch a mentoring scheme for the Women in IP community in 2024, working closely with the career guidance focus group to provide support to women in all roles in the IP sector and at all stages of their career.

4.7.5 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); Catherine French (Sacco Mann, North of England representative); Catherine Haworth (NuBreed Hotels); Amy McSkimming (Burness Paull); Michelle Montgomery (Carpmaels & Ransford); Yelena Morozova (Finnegan Europe); Kate O’Rourke

²⁵ See <https://ipinclusive.org.uk/newsandfeatures/women-in-ip-newsletter-archive/>

(Mewburn Ellis); Wendy Peet (Procter & Gamble); Sabine Rehaber (Mathys & Squire); Lucy Samuels (Gill Jennings & Every); Tara Sarwal (Haleon); and Natasza Shilling (Vodafone).

The committee leads were (until October 2023) Joanna Conway and Susi Fish, and (from October 2023 onwards) Lucy Coe.

Emily Teesdale (GKN Aerospace, formerly Airbus) stepped down from the committee in July 2023 and Barbara Fleck (Appleyard Lees) in October. Catherine Haworth, Kate O'Rourke and Natasza Shilling joined in November 2023.

The focus group members are:

- Mentoring: Amy Auger (Cambridge Mechatronics), Frances Baxter (Boulton Wade Tennant), Laura Carney (Mewburn Ellis), Joanna Conway, Catherine Haworth and Yelena Morozova.
- Events: Laura Cassels (Script IP), Lucy Coe, Victoria Coleman (Mewburn Ellis), Catherine French, Eleanor Pilott (Abel + Imray) and Agne Zasiņaite (Dentons).
- Coffee dates: Michelle Montgomery, Lidija Pavlovic (Imperial Brands) and Wendy Peet.
- Socials: Bonnie Brooks (D Young & Co), Lucy Coe, Melike Eceoglu Yalcin (Mysfyt, Inc), Susi Fish, Amy McSkimming, Rebecca Ronney (Brodies) and Lucy Samuels.
- Career guidance: Veronika Brázdová (Potter Clarkson), Triona Desmond, Chloe Flower (Carpmaels & Ransford), Charlene Nelson (Foot Anstey), Kate O'Rourke and Natasza Shilling.

5 Resources

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 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 page²⁶ and/or relevant website event posts.

One of the high-level objectives in our 2022-23 business plan was to develop the support and resources we provide – both their content and their accessibility. Within this, as requested by our supporters, we provided specific support on the inclusivity of workplaces and working arrangements post-pandemic: this gave rise to the *Inclusivity Unlocked!* programme described at 5.2 below. Other

²⁶ See <https://ipinclusive.org.uk/resources/>

resource topics mentioned in that business plan – for example allyship and mental wellbeing – were woven into *Inclusivity Unlocked!* events where feasible.

Our 2023-25 business plan takes some of these themes on into our current work, in particular allyship and post-lockdown hybrid working arrangements. We will therefore continue to focus our events and other resources in such areas.

In parallel, an increasing interest in (peri)menopause and its impact at work – that in the IP sector reflecting a change in the wider community – led to developments in the dedicated working group described at 5.3 below. This project was not envisaged in our original plans for 2023, but like our communities and many of our other successful initiatives, it was driven from the ground up by passionate and committed volunteers; we ran with it because it reflects everything that is good about the IP Inclusive model.

5.2 *Inclusivity Unlocked!*

Inclusivity Unlocked! was a programme of events and associated resources to support organisations as they emerged from the Covid-19 lockdowns. Webinars on a range of themes were used to initiate conversations; gather ideas from experts both within the IP Inclusive community and elsewhere; and generate practical tips for an ongoing compilation. The full programme, launched in September 2022, lasted about six months.

Having run five webinars during 4Q 2022, we broadcast five more during 1Q 2023:

- In January, “(Office) space: the final frontier?”, about workspace design post-Covid.
- In February, “Rainmaking for everyone”, about how the lockdowns have helped us find more inclusive approaches to business development.
- In March:
 - “Online, but not forgotten”, a joint IP Ability and CIPA webinar about online accessibility (see 4.3.2 above).
 - “Menopause: what’s changing?”, a webinar featuring 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.
 - “Too busy to flourish?”, a joint webinar with LawCare about working practices and cultures that support mental wellbeing, building on lessons learned during lockdown.

Recordings of all the *Inclusivity Unlocked!* webinars are available on our website resources page as well as via the individual event posts, and our News and Features page carries reports of their key outcomes.

The associated compilation of practical tips, presented as easily-digested slides for organisations, individual IP professionals and managers (and in one case specifically for small businesses), is also available from the resources page.

Whilst the programme was running, we had a survey open for supporters to suggest additional event topics and formats. This provided valuable user input into our plans.

Although the *Inclusivity Unlocked!* programme has now been wound down, our 2023-25 business plan includes a continued focus on inclusive and accessible hybrid working arrangements, which have become increasingly important in the wake of the changes brought by the pandemic.

5.3 (Peri)menopause support

5.3.1 The working group

Our (peri)menopause working group was established towards the end of 2022 as part of our *Inclusivity Unlocked!* programme, with the aim of improving menopause support and inclusivity in the IP professions. It continued in 2023 to organise events, resources and discussion forums. At the start of 2024 it had fifteen members.

This focus on (peri)menopause support began in response to popular demand. The topic has become increasingly widely discussed and has united IP professionals in a wide range 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 future and/or wish to understand and support others who are doing so. The project has been well received among people of all ages and genders.

5.3.2 Events

During 2023 the working group ran five events, which were open to IP professionals of all genders:

- In February, an informal online “coffee date”, dubbed “Menopause Matters”, which brought over 50 attendees together for lively and candid breakout room chats on various menopause-related issues.
- In April, another Menopause Matters coffee date, this time on the theme of “symptoms, treatments and coping strategies”.
- In October, a joint webinar with Jonathan’s Voice to mark World Menopause Day (see 6.4 below).
- In November, “Menopause myths”, a webinar with menopause specialist and qualified nurse Sam Palmer, who explained common misconceptions about (peri)menopause and offered practical advice for coping with, or supporting others who are living with, the symptoms.
- In December, an online event “Better eating for beating (peri)menopause”, in which a talk by nutritional therapist Dana Chapman was followed by informal breakout room discussions.

The group also collaborated, in March, on a menopause-related *Inclusivity Unlocked!* webinar: see 5.2 above.

Further events are being planned for 2024, including more coffee dates with specific themes and/or speakers and a webinar on legal aspects of menopause inclusivity in the workplace and “reasonable adjustments”.

5.3.3 Resources

The working group has established LinkedIn²⁷ and WhatsApp groups for IP professionals to discuss issues to do with the (peri)menopause. Both continued to generate *ad hoc* conversations throughout the year, and proved to be valuable sources of information, ideas and support. These groups are open to all UK-based IP professionals, although they are “private” groups thus allowing a degree of control over their membership and content moderation. At the start of 2024, the LinkedIn group had 59 members and the WhatsApp group 21 members.

Also produced by the working group is 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 our website resources page²⁸.

In 4Q 2023, work began on a mini-series of menopause “stories” – collected recordings and blog posts in which IP professionals share their experiences of (peri)menopause in order to reassure and inspire other people. We hope to begin publishing these in early 2024.

The group’s 2023 contributions to our website News and Features page included:

- In March, a brief report from the February coffee date and outline of the working group’s other activities and plans.
- In April, a report of the March *Inclusivity Unlocked!* webinar.
- In November, a report of the October webinar with Jonathan’s Voice.
- In December, a report of the November “Menopause myths” webinar.

In 2024 it also hopes to explore the possibility of facilitating and promoting “menopause champion” training for IP professionals. This is likely to begin with one or two group members who can then provide a webinar on the subject to the wider IP Inclusive community.

5.3.4 Key contacts

The current members of the (peri)menopause working group are: Sara Bennett (Marks & Clerk); Susan Bradley (Marks & Clerk); Andrea Brewster (IP Inclusive); Mandi Ellinor (AA Thornton); Karen Genuardi (AA Thornton); Megan Jefferies (Thrings); Maria Hall (Mewburn Ellis); Mandy Laurie (Burness Paull); Vicky Maynard (formerly Marks & Clerk); Angela McCleave (Boult Wade Tennant); Laura Newby (Ministry of Defence); Marianne Privett (AA Thornton); Helen Smith (IP Inclusive); Victoria Townsend (Pure Ideas, formerly Rolls-Royce); and Jane Wainwright (Potter Clarkson).

Mandi Ellinor and Helen Smith curate the (peri)menopause resources document. Jane Wainwright established and manages the LinkedIn group, Vicky Maynard the WhatsApp group. The activities of the working group are coordinated by Andrea Brewster and Helen Smith.

²⁷ See <https://www.linkedin.com/groups/12778267/>

²⁸ See <https://ipinclusive.org.uk/resources/menopause-inclusivity/>

5.4 IP Inclusive events

5.4.1 General

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.

In 2023 the IP regulator IPReg issued new guidance on continuing professional competence²⁹ alongside its new regulatory arrangements that came into force on 1 July. This guidance includes several topics relating to EDI and wellbeing (for example knowledge and awareness of equality and diversity; how to make reasonable adjustments for clients or colleagues; unconscious bias; inclusive leadership and management; and the importance of mental and physical wellbeing in the workplace) in its suggestions for patent and trade mark attorneys’ professional development. It notes how such issues “affect not only inclusivity (and thus also diversity) in the workplace, but also attorneys’ productivity, resilience and general fitness to practise”. We believe the guidance lends additional credibility and value to the content that IP Inclusive generates.

5.4.2 Our 2023 listings

We posted 43 events for 2023 on our website events page³⁰, plus a summary of the introductory events forming part of the *Summer of IP* campaign (see 2.2 above). Seventeen of these were organised through our communities (see 4 above), four through our (peri)menopause working group (5.3 above), one through our Scotland Network (3.2.2 above), one through our senior leaders’ diversity think tank (7.4 below) and one as a stand-alone event with the IPO for *Summer of IP*. They also included five events in the *Inclusivity Unlocked!* series (5.2 above) and our 2023 annual meeting (12.1 below).

Often our communities and networks run joint events, recognising the intersectionality between different under-represented groups. One of our 2023 webinars, for example, was a collaboration between IP & ME and Women in IP (see 4.7.2 above).

²⁹ See <https://ipreg.org.uk/sites/default/files/Continuing%20competence%20guidance.pdf>

³⁰ See <https://ipinclusive.org.uk/events/>

We organise some of our events in partnership with other organisations such as AIPLA, ChIPs, CIPA, CITMA, Illuminate VR, Jonathan’s Voice and LawCare. 2023 saw fifteen such collaborations, of which eight involved Jonathan’s Voice (see 6.4 below) and two were part of *Inclusivity Unlocked!* In January 2023 our events page also listed a CITMA webinar on managing stress in the workplace, which was open to IP Inclusive supporters.

Meetings of our senior leaders’ think tank were not posted on the website; nor were the related “Pledge Prattle” sessions (see 3.5.2 above).

5.4.3 Attendance levels

Event “no-show” rates increased in 2023, but IP Inclusive does not seem to be alone in observing this. There can be any number of reasons why people are unable to attend an event they have registered for in good faith, particularly in the context of a “non-core” topic such as EDI. IP professionals’ working routines have also changed since the Covid-19 pandemic, with perhaps less certainty as to location and timing and less “spare time”. Both work-related and personal issues can disrupt plans, as can the weather and travel problems, further complicated in 2022 and 2023 by rail strikes. We are also aware that some people – perhaps not unreasonably – register to attend an online event purely so as to access the recording and follow-up resources.

We understand all these issues and factor them into our event planning and registration systems.

Despite the above, we have been pleased to see good numbers of attendees at most of our events, with the exception of those planned in the regions (see the discussion at 3.2.1 above). Our mental health-related webinars with Jonathan’s Voice have proved particularly popular, as have those about the (peri)menopause.

5.5 Other 2023 resources

During 2023 we published 20 new items on our website resources page, expanding and enriching the content available to help our supporters with their EDI work. These included eighteen event recordings (often with associated materials such as speaker presentations and follow-up links); the (peri)menopause support document referred to at 5.3.3 above; and a summary of the *Summer of IP* introductory events and recordings (2.2 above). We also added more “top tips” to the *Inclusivity Unlocked!* compilation (5.2 above), based on the five webinars in 1Q 2023.

On our website News and Features page³¹, 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 fifteen event reports summarised guidance and insights shared by participants, featuring practical tips and supporting resources; they embraced events on mental wellbeing, (peri)menopause, social mobility and online accessibility; *Inclusivity*

³¹ See <https://ipinclusive.org.uk/newsandfeatures/>

Unlocked! webinars; and events run by our five communities (see 4 above). In addition we featured seventeen guest posts from *Summer of IP* alumni: see 2.2.4 above.

Other 2023 News and Features posts provided:

- Guidance for trans allies from IP Out (see 4.6.3 above) and on inclusivity issues surrounding the creation of new roles in an organisation (4.7.3 above).
- Information and advice about digital accessibility and about support for people with hearing loss (4.3.3 above).
- Content relating to South Asian Heritage Month (4.2.3 above).
- Comment on IP sector career opportunities, queer theology, the benefits of mentoring, the results of an IP sector workforce survey, and accessibility aspects of changes to the qualifying exams for European patent attorneys.
- Updates from our communities, the Careers in Ideas task force (including about its Mentoring Hub and *Summer of IP* campaign – see 2 above), our (peri)menopause working group and our governing body IPIM (9.2 below).
- Access to our 2022 Annual Report, our 2023-25 business plan and the minutes of 2023 IPIM and Advisory Board meetings.
- Information about regulatory changes relevant to the IP sector, and about IP Inclusive’s responses to relevant consultations.
- Reflections by our 2023 intern Ayaan Ali (10.4 below) on her work with IP Inclusive.
- Signposts to outreach charities and opportunities to get involved with them, as well as specific updates and calls to action from In2scienceUK and The Access Project (2.5.3 above).

Many of the News and Features posts were contributed voluntarily by, or sourced by, our supporters. Anne Burgato and Helen Smith in our executive team also generate content and capture event outcomes, helping us to publish prompt and targeted resources.

Further resources are available from our website Mental Health and Wellbeing page³² (which Jonathan’s Voice are helping us to update: see 6.2 below), and from specific community pages (for example the disability-related resources collated by IP Ability³³ and Women in IP’s “Quick wins for Charter signatories”³⁴).

5.6 Resource coordination and accessibility

5.6.1 Promoting our resources

New events and resources are flagged in our fortnightly update newsletters and on our LinkedIn page. More targeted event reminders are occasionally sent to relevant sections of our mailing list. Supporters can also subscribe to notifications of new News and Features posts.

³² See <https://ipinclusive.org.uk/mental-health-and-wellbeing/>

³³ See <https://ipinclusive.org.uk/resources/disability-confidence/>

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

Where feasible, we collate and publish ideas, best practices and resources available from relevant external organisations – with the help of our Advisory Board, communities and other groups. We also work with IP sector membership bodies to disseminate our own resources more widely: see for example the collaborations described in 7.5 below.

5.6.2 Event 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. Although we increased the proportion of in-person events during 2023, as requested by our supporters, these have proved more popular in London than in the regions (see 3.2 above) and have also continued to be dogged by rail strikes.

We have of course taken care to ensure that our hybrid events, which allow both in-person and virtual attendance, are suitably welcoming and inclusive for both groups of participants, in particular during interactive Q&A sessions.

Our 2023-25 business plan² commits to providing more in-person events to offer our supporters opportunities for informal networking, relationship-building and mutual support; we believe this is important for fostering awareness and understanding, and hence inclusivity and allyship.

5.6.3 Online accessibility

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.

In 2024 we will be working to improve the accessibility of our online resources. Our executive team (Andrea Brewster, Anne Burgato and Helen Smith) will undertake basic training on the issues involved and resources available, with the aim of building best practices into our future events and content. This training will be provided in 1Q 2024 by Chris Naylor from Bnode³⁵, who spoke at our March webinar “Online, but not forgotten” (see 4.3.2 above). We will also seek Chris’s input to optimise digital accessibility for our new Careers in Ideas website (2.5.1 above).

6 Mental health and wellbeing

6.1 General

We believe that mental wellbeing is closely linked to inclusivity in the working environment. There is also an intersection between mental health and diversity- and inclusion-related issues, with

³⁵ See <https://bnode.co.uk/>

members of marginalised groups often suffering disproportionate challenges³⁶. We therefore continue to work alongside other organisations to encourage conversations on this topic and to provide guidance and support to improve wellbeing in the UK's IP professions.

During 2023 we initiated a project focused on men's mental health: see 6.3 below. We also continued to develop a working group dedicated to (peri)menopause inclusivity and support (5.3 above), which we expect will contribute to improving mental wellbeing in the sector.

6.2 Collaborations with external organisations

We recognise that other, more specialist, organisations are already doing great work to promote mental wellbeing. We partner with them wherever feasible, to avoid duplicating or diluting one another's efforts.

We continued to work closely in 2023 with the mental health charities LawCare³⁷ (which serves the entire legal community) and Jonathan's Voice³⁸ (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: see 6.4 below.

We also helped promote relevant events from other IP sector organisations, for example a January CITMA webinar on managing workplace stress (which they kindly opened, free of charge, to all IP Inclusive supporters).

During 2023 Helen Smith, Andrea Brewster and volunteers from our Advisory Board worked with Jonathan's Voice on an updated version of our website mental health and wellbeing page³². Our aim is to provide it with a more concise and accessible structure, that clearly signposts the information and resources likely to be of use to site visitors. We hope to complete the update in 1Q 2024.

Our Lead Executive Officer Andrea Brewster remains a LawCare Champion, and is therefore well placed to help the charity ensure its support is accessible to, and appropriate for, IP professionals.

6.3 Men's mental wellbeing

In February 2023 Andrea Brewster attended a LawCare round-table on men's mental health in the legal sector, with Richard Wells from our Mental Health First Aiders' Network. By way of follow-up, and in collaboration with Jonathan's Voice, they organised an IP Inclusive round-table focusing specifically on the IP professions; this took place in May. Attendees discussed how best to support men in the IP professions, exploring challenges and opportunities as well as possible engagement formats.

³⁶ See the results of the 2020-21 LawCare survey at <https://www.lawcare.org.uk/latest-news/life-in-the-law-new-research-into-lawyer-wellbeing/>, and our 2022 "Mental health and intersectionality" webinar report at <https://ipinclusive.org.uk/newsandfeatures/reflecting-on-our-mental-health-and-intersectionality-webinar/>

³⁷ See <https://www.lawcare.org.uk/>

³⁸ See <https://jonathansvoice.org.uk/>

There was no clear consensus at this meeting as to the form that mental wellbeing support should take for men in IP. In particular, there seemed to be insufficient interest in a dedicated Men in IP support group. Our follow-up therefore consisted of an informal networking event to continue the conversation, which we ran in November 2023. Hosted by Mathys & Squire in London, this in-person event featured a talk by mental health champion Nick Bloy of Wellbeing Republic, author of the 2022 LawCare report on "Men's mental health in the legal profession", who shared his insights into the work behind that initiative and led discussions on what individuals and organisations can do to support men's wellbeing.

The November event was extremely well attended, including by male IP professionals, and provided a valuable opportunity to begin conversations on the themes Nick had raised. We surveyed attendees afterwards and sought their suggestions for appropriate follow-up; we will continue to work on this with Jonathan's Voice during 2024, potentially organising further events to maintain visibility of men's mental health issues and normalise conversations about them.

In addition to this project, our joint webinar with Jonathan's Voice in September 2023 focused on the causes and prevention of male suicide: see 6.4 below.

6.4 IP Inclusive events

Our other 2023 events on mental health and wellbeing included six highly popular joint webinars with Jonathan's Voice:

- In April, "How to have conversations with ourselves and others... and what to do next", about conducting and acting on conversations about mental health.
- In May, during Mental Health Awareness Week: "Using mindfulness at work: a practical introduction".
- In 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.
- In September, "Male suicide – Myths, Action, Hope", to mark World Suicide Prevention Day, featuring an update from Susie Bennett on her research into male suicide at the University of Glasgow's Suicidal Behaviour Research Laboratory.
- In October, "Shining a light on the menopause", to mark World Menopause Day, in which a panel of IP professionals shared their personal experiences and suggestions.
- In December, "Exploring anxiety", which looked at what causes anxiety, how it affects our brains and bodies, its impact on our work and how to manage it.

We are already planning more joint webinars with Jonathan's Voice during 2024, including one in January on handling the tendency to procrastinate.

We co-organised two further mental health-related events in March 2023:

- A two-day online mental health first aid course from Illuminate VR³⁹, provided at a discounted fee for IP Inclusive supporters.
- Our final *Inclusivity Unlocked!* webinar, with LawCare, about working cultures and their impact on mental health (see 5.2 above).

6.5 Our Mental Health First Aiders' Network

Our Mental Health First Aiders' (MHFAers') Network⁴⁰ 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 LinkedIn and WhatsApp groups: at the start of 2024 the LinkedIn group had 67 members (65 at the start of 2023) and the WhatsApp group 31 members (as at the start of 2023). These help us widen access to relevant events and resources.

Our partners Illuminate VR offer occasional discounted MHFA training courses that provide additional practical support for network members.

6.6 Resources and awareness-raising

During 2023 we published reports of five of our mental health-related webinars on our website News and Features page, and recordings of all seven on our website resources page (with speaker slides and other follow-up resources where appropriate). Many of our (peri)menopause-related posts (see 5.3.3 above) also referenced mental-health related symptoms.

The mental health and wellbeing page of our website³² also carries a great deal of information, guidance and resources, which we are working with Jonathan's Voice to update (see 6.2 above).

6.7 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). The men's mental wellbeing project described at 6.3 above is led by Richard Wells (Tropic) and Andrea Brewster. IP Inclusive Executive Support Helen Smith helps coordinate our work with Jonathan's Voice; our mental health-related events, resources and online content; and our (peri)menopause working group (see 5.3 above).

7 Widening participation

7.1 General

IP Inclusive is for all the IP professions, and involvement 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 in recent years we have seen involvement from an increasingly diverse group of people, including from the business support professionals who work alongside legal staff.

³⁹ See <https://www.illuminatevr.co.uk/>

⁴⁰ See <https://ipinclusive.org.uk/newsandfeatures/our-support-network-for-mental-health-first-aiders/>

There will always be more work to do on this front, and our 2023-25 business plan requires us to continue our efforts to widen our reach, in particular by:

- Increasing the diversity of representation (especially of professional role) in the committees of our communities, networks and working groups.
- Tailoring the support, resources and events we provide for currently under-represented groups.
- Consulting with representatives of those groups regarding the barriers to engagement and potential solutions.
- Encouraging our Charter signatories and other supporters to act as ambassadors for IP Inclusive and seeking their help in reaching those not currently involved with, and/or interested in, EDI issues.
- Engaging with relevant external organisations, to raise awareness of IP Inclusive among under-represented groups.

This work will focus in particular on IP paralegals, business support professionals, IP solicitors and barristers and in-house IP professionals. Where feasible, we will also work with relevant bodies (including IP offices) to encourage involvement by those who generate and manage IP outside the legal professions, for example inventors and creators, searchers, tech transfer professionals, and IP management and related service providers.

7.2 IP solicitors and barristers

During the first half of 2023 our Charter signatory outreach meetings (see 3.3 above) helped enhance our engagement with law firms and the IP solicitors who work in them. They yielded new contacts, offers of support and opportunities for collaboration. We also remained in touch throughout the year with the IP Bar Association – with whom we have good links through IPIM members Michael Silverleaf and James St Ville – regarding activities and events likely to be of interest to its members.

Several IP solicitors and barristers were involved in our *Summer of IP* campaign (see 2.2 above), including as event hosts and organisers, as speakers, as providers of employer opportunities and for one-to-one “coffee date” chats.

Five law firms have already contributed to our 2023-24 fundraising campaign, as has one set of IP chambers. Four law firms and one set of chambers hosted events for us in 2023, whilst Allen & Overy have kindly offered to host our 2024 annual meeting (see 12.1 below). Clifford Chance funded a four-week intern for us in June 2023 (10.4 below) and have agreed to do the same during 2Q 2024.

IP solicitors and/or barristers are represented on IPIM, our Advisory Board, the Careers in Ideas task force, the committees of our communities, and our (peri)menopause working group.

7.3 Paralegals and business support professionals

Several of our 2023 initiatives brought increasing levels of engagement with IP paralegals and business support professionals (for example HR and marketing professionals and practice managers). These included:

- Our (peri)menopause support working group, its associated networks and the events it has run: see 5.3 above.
- Several *Inclusivity Unlocked!* webinars (5.2 above), in particular those on workspace design, business development and menopause inclusivity, which involved business support professionals not only as attendees but also as speakers and/or organisers.
- Ongoing “Pledge Prattle” discussions (3.5.2 above), which continue to involve a wide range of business support professionals from patent and trade mark practices.
- A *Summer of IP* introductory event (2.2 above) about careers as an IP paralegal, with panellists representing both CIPA- and CITMA-qualified paralegals. This recording will remain as a careers resource for both institutes, and their members, to use when recruiting new paralegals.
- Our July webinar with Jonathan’s Voice about mental wellbeing for IP paralegals and business support professionals (6.4 above).
- At the instigation of CIPA’s marketing managers’ group, the addition of content about IP sector marketing roles to the Careers in Ideas website (2.5.1 above).

In February Andrea Brewster 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. She is scheduled to meet with a group of IP practice HR managers in January 2024.

In October she spoke on the topic of allyship, and the unconscious assumptions that can undermine it, at CIPA’s Paralegals’ Conference in London.

Paralegals and/or business support staff are represented on our Advisory Board, the Careers in Ideas task force, our community committees and our (peri)menopause working group. IP sector recruiters are represented on our Advisory Board, Careers in Ideas task force and Women in IP committee. Many of these people were involved in the *Summer of IP* campaign (see 2.2 above), both in 2023 and in planning for the 2024 re-run, which has proved valuable for shaping and targeting content for new generations of recruits.

7.4 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 and to their clients in in-house IP teams.

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.

2023 highlights for the think tank included:

- In February, a plenary meeting with guest speakers from The IP Federation, about the EDI credentials that corporate clients seek from their outside counsel.
- In December, a webinar entitled “Diversity & inclusion with the IP offices: a holistic approach”. Representatives from the UK IPO, EPO, WIPO and USPTO discussed their initiatives to widen access to, and participation in, IP and how we can work together to nurture diversity throughout the IP ecosystem. This event was open to all IP Inclusive supporters.
- Four “Pledge Prattle” meetings for signatories to the Senior Leaders’ Pledge and their colleagues (see 3.5.2 above).
- The involvement of many think tank members’ firms in our *Summer of IP* outreach campaign (2.2 above).

The February plenary meeting included a discussion on clients’ EDI data gathering requirements, which can vary significantly and can be tricky to satisfy within the realms of UK data protection and employment laws. By way of follow-up, the organisers of that meeting (Andrea Brewster, Saiful Khan (Potter Clarkson) and Gwilym Roberts (Kilburn & Strode)) met with representatives from CIPA, CITMA, The IP Federation, IPReg and the IPO to discuss the potential creation of guidelines and basic sector standards for EDI data gathering. There was unanimous support for collaborating on this project, and a valuable exchange of ideas and resources from other IP and wider legal sector sources. The group met again in November and will now begin creating a template for a basic EDI survey, about which it will consult with think tank members in a February 2024 meeting.

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.

7.5 Other IP sector organisations

7.5.1 CIPA and CITMA

Our relationships with our four founding organisations, and in particular with CIPA and CITMA⁴¹, remain close and productive. They are both represented on our Advisory Board and IPIM. Our senior leaders’ diversity think tank is also largely comprised of CIPA and CITMA members and their colleagues, having been established with the two institutes’ help. We are grateful to them for their continuing support, both financially and through involvement in specific projects, and for their help in engaging not only patent and trade mark attorneys but also the professionals who work with them in the IP sector.

⁴¹ See <https://www.cipa.org.uk/> and <https://www.citma.org.uk/>

Our collaborations with CIPA and CITMA during 2023 included:

- In January and March, joint webinars with CIPA on (i) social mobility and outreach and (ii) digital accessibility; these were open to all IP Inclusive supporters.
- In March, attendance by our Lead Executive Officer Andrea Brewster at CIPA’s New President’s Reception, along with several other IPIM members and IP Inclusive community representatives, where she spoke with new President Daniel Chew about his intention to prioritise EDI during his year of office.
- In June, a joint webinar with CITMA on “How to create an EDI strategy for lasting change”, where Andrea took part in a panel discussion alongside Nicola Smith (Inclusion and Diversity Cultural Advisor at the IPO) and former CITMA Presidents Richard Goddard and Kate O’Rourke.
- In October, Andrea’s talk at the CIPA Paralegals’ Conference: see 7.3 above.
- In November, her talk at the CIPA Life Sciences Conference in Brighton, explaining IP Inclusive’s plans for the next twelve months and in particular its focus on allyship.

As in previous years, both CIPA and CITMA have kindly opened their EDI- and wellbeing-related webinars, free of charge, to all IP Inclusive supporters. In 2023 those included the joint webinars referred to above, and also a January CITMA webinar on managing stress in the workplace.

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 have been invited to speak at their annual student conference in April 2024; this will take the form of a joint session with Jonathan’s Voice about the challenges of starting out in a new career.

Andrea contributes regular IP Inclusive updates to the monthly *CIPA Journal*, and also articles for the *CITMA Review*, the latter including a piece on allyship – “Avoiding the mouse trap” – for its September 2023 edition.

She has been invited to participate, in February 2024, in a special EDI-focused meeting of CIPA’s governing Council. Other participants will include representatives from CIPA’s Diversity & Inclusion Committee, the Diversity & Inclusion Working Group of CITMA’s Executive Committee, and IPReg.

See also 7.3 above about our work with CIPA and CITMA paralegal members as well as the business support professionals who work alongside the two institutes’ members.

7.5.2 The IP Federation

Another of our founding organisations, The IP Federation⁴² continues to support and promote IP Inclusive’s activities and encourage its members to get involved. Members of its Diversity & Inclusion Working Group are represented on IPIM, our Advisory Board and the Careers in Ideas task force. Other in-house IP professionals, in whose interests The IP Federation acts, are also represented in

⁴² See <https://www.ipfederation.com/>

these forums and on the committees of our communities. Their input is invaluable, not only for the fresh perspectives they bring but also because they and their employers often have EDI expertise that can help us promulgate best practices in the private sector.

During 2023 we continued to work with the IP Federation on a version of our Senior Leaders' Pledge tailored specifically for in-house leaders: see 3.5.3 above. IP Federation representatives also contributed to the February 2023 plenary meeting of our senior leaders' think tank (7.4 above) and are involved in the associated work on EDI data gathering standards.

7.5.3 The UK Intellectual Property Office (IPO)

We have continued to collaborate with the IPO⁴³, its senior staff and its internal support networks, sharing knowledge and experiences and 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 sits on our Advisory Board, having served as its Chair throughout 2022. IPO employees and/or other public sector IP professionals are represented on our Advisory Board, the Careers in Ideas task force, the IP Out committee and our (peri)menopause working group.

IPO representatives took part in our June IP Ability webinar on the Disability Confident scheme (see 4.3.2 above) and our December senior leaders' think tank event (7.4 above). Andrea Brewster works particularly closely with Ben Buchanan and Nicola Smith to ensure our EDI-related activities are sensibly aligned for the benefit of the wider IP sector. For similar reasons, Nicola is also involved in our work on EDI data gathering standards (7.4 above).

7.5.4 Other

During 2023 IP Inclusive participated in several events organised by other IP sector organisations, and contributed to a number of their publications. We are grateful to these organisations for making us feel so welcome and for providing valuable opportunities for us to raise awareness of our work among IP professionals and the bodies they represent.

Those opportunities included the following:

- In April, our Lead Executive Officer Andrea Brewster spoke at an Intellectual Property Awareness Network (IPAN)⁴⁴ event in London to mark World IP Day, celebrating the achievements of women inventors, creators and entrepreneurs around the world. Andrea talked of the ingenuity that derives from women's often marginalised positions, and IP Inclusive's role in promoting allyship and more diverse participation in the IP system; she also took part in the subsequent panel discussion.

⁴³ See <https://www.gov.uk/government/organisations/intellectual-property-office>

⁴⁴ See <https://ipaware.org/>

- In June, Advisory Board members Caelia Bryn-Jacobsen and Carol Nyahasha represented IP Inclusive at the *Managing IP* awards dinner, where they were invited to say a few words about our work and naturally encouraged attendees to get involved.
- In November we collaborated with the London chapter of the ChIPs (“Chiefs in Intellectual Property,”) network⁴⁵ 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 featured input from The Honourable Mr Justice Meade and from ChIPs representatives involved in lobbying for the changes. It was a valuable opportunity to hear from, and to network with, IP solicitors, barristers and clerks; several IP Inclusive representatives attended.

We continue to collaborate with the IP and legal sector mental health charities Jonathan’s Voice and LawCare: see 6.2 above.

We also enjoy continuing support from the IP sector regulator IPReg⁴⁶ (see 8.2 below), which has donated towards our basic operating costs for several years now, including in 2023.

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.

7.6 International collaborations

IP Inclusive does not have the resources to extend its reach beyond the UK, and our objectives remain firmly focused on the UK’s IP professions. Nevertheless, we continue to collaborate with international organisations where feasible so as to learn from one another’s experiences in the EDI space.

In April, our Women in IP community joined forces with the AIPLA on their global Women in IP networking events (see 4.7.2 above), something they have done for several years now. They, alongside IP & ME, also worked with representatives from the US-based “Patent Pathways” scheme on a September webinar (also 4.7.2 above).

IP Inclusive supporters are still represented on the Diversity & Inclusion Working Group established by the Board of the Institute of Professional Representatives before the European Patent Office (epi)⁴⁷. Sally Bannan, who is active in that group, joined our Advisory Board in July 2023: see 9.3.2 below. We will assist them wherever possible in promoting EDI to the epi Council and its wider membership.

⁴⁵ See <https://chipsnetwork.org/>

⁴⁶ See <https://ipreg.org.uk/>

⁴⁷ See <https://patentepi.org/en/>

Gwilym Roberts (co-leader of our senior leaders’ think tank and CIPA Honorary Secretary) continued to act as an IP Inclusive representative and rapporteur in the US-based Global IP Alliance⁴⁸, following its invitation to IP Inclusive to participate in 2022. EDI is a key part of the Alliance’s objectives.

IP Inclusive has also been invited to take part in an AIPLA-led colloquium on “Incentivizing Innovation, Entrepreneurship and Creativity Through Diversity, Equity, Inclusion and Accessibility,” to be held in Puerto Rico in late January/early February 2024. Although we do not have the resources to attend ourselves, Robert Watson (Mewburn Ellis and FICPI-UK) has kindly agreed to speak for us there about IP Inclusive’s work, and to report back on relevant outcomes.

7.7 Other ongoing projects

Several of our other initiatives have helped us widen our engagement, in particular with IP professionals in non-legal or other “supporting” roles:

- Our Careers in Ideas outreach initiative (see 2 above) 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. Its 2023 *Summer of IP* campaign increased that; it included events and activities both organised by and targeted at IP solicitors and barristers, IP paralegals, IPO and other public sector employees, and business support professionals. The wider the range of careers represented in this work, the greater will be our influence and reach among would-be recruits.
- Our (peri)menopause working group (5.3 above) also unites people in all kinds of roles and working environments. Its activities and resources are open to professionals of all genders and ages and in all IP sector roles.
- Our work with Jonathan’s Voice and LawCare on mental health and wellbeing (6.2 above) helps us reach a wide range of IP professionals, mental health being an issue that can affect every one of us regardless of role or seniority and that generates increasing interest across the community.
- Our 2023 focus on men’s mental health (6.3 above) has increased gender diversity among IP Inclusive supporters, as have our events on (peri)menopause and our Women in IP coffee dates (both of which have seen participation from male allies) and our senior leaders’ think tank (which includes a large number of men, due to their historical over-representation among senior ranks in the IP professions).

IP Inclusive also remains a signatory to the Tech Talent Charter⁴⁹, which increases our access to EDI-related initiatives, resources and ideas from other tech-related, often IP-generating, organisations outside our sector. We are involved in this initiative on a special basis that waives the requirement for annual submission of tech staff diversity data – this being inappropriate for IP Inclusive – but that recognises the benefits to both sides of sharing access to contacts and resources. We hope to

⁴⁸ See <https://www.glipa.org/>

⁴⁹ See <https://www.techtalentcharter.co.uk/home>

involve the Tech Talent Charter, and/or some of its other signatories, in our 2024 work on inclusive hybrid working arrangements.

8 Lobbying/influence

8.1 General

Although we avoid engaging in 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. This extends to issues that could unfairly restrict access to, or progression within, IP-related careers.

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 five communities also provide forums through which to channel concerns about challenges affecting specific groups.

8.2 Regulation

IPReg⁴⁶ 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 April 2023 IPReg published new regulatory arrangements. Having taken part in the consultations preceding these changes, we were delighted to see EDI-related objectives feature in the “overarching principles” of the regulator’s new Core Regulatory Framework as well as its guidance on continuing competence. In June we published a website News and Features post⁵⁰ about the new arrangements, which came into effect on 1 July 2023.

In August we responded to IPReg’s July 2023 consultation on its 2024/25 business plan, budget and practising fees. Our submissions⁵¹, prepared with input from our IP Ability and Women in IP communities:

- Supported most of the proposed plans, many of which we believe are 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.

⁵⁰ See <https://ipinclusive.org.uk/newsandfeatures/edi-key-to-ipregs-new-regulatory-arrangements/>

⁵¹ See <https://ipinclusive.org.uk/newsandfeatures/ip-inclusive-response-to-ipregs-2024-25-business-plan-budget-consultation/>

- 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.
- Endorsed the extension of the “not in active practice” registration fee category to adoption and other types of parental (not just maternity) leave; we had lobbied for this more gender-balanced approach in our responses to the corresponding 2021 and 2022 consultations.
- Praised the maintenance of the broad-scope discretionary fee waiver, again as we had advocated for in the past; we believe this should help reduce negative impacts from IPReg’s proposed fee increases on particular groups.

Also in August 2023 Andrea Brewster attended, by invitation, a meeting with IPReg as part of their forthcoming review of barriers to entry to the patent profession. The discussions extended to some of the education-related projects referred to in the draft business plan, and we are encouraged by IPReg’s continuing inclusion of IP Inclusive in its consultation and planning processes. Andrea has since been invited to a “Regulatory Forum” meeting with the Chief Executives of IPReg, CIPA and CITMA in March 2024, to discuss ongoing collaboration on EDI initiatives.

IPReg is also involved in our work on EDI data gathering (see 7.4 above), which could be relevant to its own rules on data gathering in the regulated community.

8.3 Access to the IP professions

We are aware of proposed changes to the degree entry requirements for the EQEs (the qualifying examinations for European patent attorneys). We believe these could significantly limit access to the patent profession for UK STEM graduates, in particular those from less advantaged backgrounds, and thus compromise diversity in the UK patent profession. We intend in the future to lobby against the proposals and are collaborating with the Diversity & Inclusion Working Group of the representative body epi⁴⁷ to determine the appropriate time and forum for IP Inclusive’s input. The epi Working Group has already published objections to the proposals⁵², as has CIPA; we intend to endorse their comments on EDI-related issues.

9 Structure, governance and management

9.1 General

The structural and governance changes of 2021 continued to function well for us during 2023, allowing the executive team to expand with the confidence of a strong supporting framework and sound sources of oversight and guidance. IP Inclusive Management (IPIM) itself has also grown in size and depth, and the Advisory Board has continued to provide it with valuable input on both strategic and operational matters.

⁵² See <https://information.patentepi.org/issue-3-2023/prerequisites-to-sit-the-future-e-eqe-perspective.html>

It remains our longer-term goal to incorporate IP Inclusive as a community interest company. We hope to look into this more closely (as well as into alternatives such as a charitable incorporated organisation) during the two years covered by our 2023-25 business plan.

9.2 IP Inclusive Management

9.2.1 General

IP Inclusive Management (IPIM)⁵³ 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 activities; and to ensure that IP Inclusive functions appropriately at the formal and administrative levels. In particular through its executive team (see 10 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 2023 AGM) are:

- Michael Silverleaf KC, 11 South Square (Chair)
- Clair Curran, Reckitt (Secretary)
- Gordon Harris, Gowling WLG (Treasurer)
- Ese Akpogheneta, BAT
- Robert Andrews, Mewburn Ellis
- Andrea Brewster
- Alicia Chantrey, Associated British Foods
- Julie Dunnett
- Lesley Evans
- James St Ville KC, 8 New Square

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

Julia Florence served as Secretary during the first part of 2023, stepping down at the April AGM. Andrea Brewster served as acting Secretary between the AGM and the appointment of Clair Curran to the role at a 2 May 2023 IPIM meeting.

A register of IPIM members' interests is available on the IPIM page of our website; it was updated on 12 May 2023 to incorporate entries for new members. The IPIM constitution⁵⁴ is available on the same page.

⁵³ See <https://ipinclusive.org.uk/ip-inclusive-management/> and <https://ipinclusive.org.uk/the-ip-inclusive-management-team/>

⁵⁴ See <https://ipinclusive.org.uk/wp-content/uploads/2021/06/210607-new-ipim-constitution.pdf>

9.2.2 Membership changes

In January 2023 IPIM launched a campaign to recruit one or two new members, in particular to replace Julia Florence (who was to step down at the 18 April AGM) but also to broaden perspectives and assist with succession planning.

The campaign attracted a strong field of seven candidates, from which 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 accepted; their appointments were confirmed at the April AGM.

9.2.3 2023 meetings

IPIM met on 25 January, 21 March, 2 May, 20 June, 27 September and 7 December 2023. Its formal AGM was incorporated into IP Inclusive’s annual meeting on 18 April 2023. The minutes of these meetings are available from the IP Inclusive website⁵⁵.

The January meeting also involved Carol Arnold, the new Advisory Board Chair. The May meeting included a joint session with the Advisory Board. The September one was entirely a joint meeting with the Advisory Board.

IPIM members also met informally in London on 26 April for new and existing members to get to know each other, and on 27 September (also in London) with Advisory Board and executive team members.

9.2.4 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 our wider support base: see 9.4 below. IPIM is also responsible for IP Inclusive’s annual (including financial) reports: those for 2022 were published on 20 January 2023⁵⁶ and formally accepted at the 18 April AGM.

For more details of IP Inclusive’s finances, see 11 below.

9.2.5 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”⁵⁷. 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 £11,000 at the start of the period from August 2023 to July 2024 and will be

⁵⁵ See <https://ipinclusive.org.uk/newsandfeatures/ipim-meeting-minutes-2023/>

⁵⁶ See <https://ipinclusive.org.uk/newsandfeatures/our-2022-annual-report/>

⁵⁷ See <https://ipinclusive.org.uk/wp-content/uploads/2021/03/210317-plans-for-ip-inclusives-future.docx>

increased by an appropriate amount each year to accommodate growth, this year's increase taking it to £13,000. The contingency fund does not affect our not-for-profit method of operating.

- Transparent and open communications with (including input from) our stakeholders.
- A code of conduct⁵⁸ 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.

IPIM also carries HMRC enquiry fee protection, through its accountants Haines Watts: see 11.2.1 below.

9.3 The IP Inclusive Advisory Board

9.3.1 General

The IP Inclusive Advisory Board⁵⁹ 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.

9.3.2 Personnel

As at 1 January 2024 the Board's 26 members, appointed by IPIM, were Susan Antoine (Haseltine Lake Kempner; South West Network); Carol Arnold (formerly Shell; IP Federation); Sally Bannan (Cytiva; epi); Julie Barrett (Purposive Step Consulting; Careers in Ideas task force); Julie Browne

⁵⁸ See <https://ipinclusive.org.uk/wp-content/uploads/2023/11/231109-ip-inclusive-volunteers-code-of-conduct.pdf>

⁵⁹ See <https://ipinclusive.org.uk/the-ip-inclusive-advisory-board/>

(Shell; Careers in Ideas task force; IP Federation); Caelia Bryn-Jacobsen (Kilburn & Strode; IP Ability; CIPA Council); Ben Buchanan (IPO); Becky Campbell (formerly Mewburn Ellis; IP Ability); Liz Dawson (Dentons); Pete Fellows (Fellows and Associates; Careers in Ideas task force); Jodie Johnson (Boulton Wade Tennant); David Joo (Aon; Careers in Ideas task force); Saiful Khan (Potter Clarkson; senior leaders' think tank); Abdulmalik Lawal (Franks & Co; IP & ME; North of England Network); Liam Lawlor (TLIP); Josh McLennon (Håmsø Patentbyrå AS, formerly Kilburn & Strode; IP & ME); Charlene Nelson (Foot Anstey; Mental Health First Aiders' Network); Carol Nyahasha (Kilburn & Strode, formerly Elkington & Fife; Careers in Ideas task force; CITMA Council); Sarah Phillips (Wynne Jones IP, formerly Abel + Imray); 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; CIPA Council); Sarah Vaughan (CITMA); and Sheila Wallace (Marks & Clerk; Careers in Ideas task force; CIPA Council).

In January 2023 Carol Arnold succeeded Ben Buchanan as Chair, although Ben remains as a Board member. Josh McLennon continued in post as Secretary.

Sally Bannan was appointed to the Board in July, bringing a valuable link to the epi's increasingly active Diversity & Inclusion Working Group (see 7.6 above).

9.3.3 2023 meetings

The Advisory Board met four times during 2023, on two of which occasions they were joined by IPIM members for part of the meeting:

- 28 February 2023
 - Andrea Brewster attended this meeting to answer questions and discuss the Board's role and interactions with IPIM and the executive team.
 - Board members also provided initial suggestions for the 2023 business plan.
- 2 May 2023
 - This was a joint meeting with IPIM and focused largely on the 2023 business plan, including in light of input from the 18 April annual meeting.
 - The Board continued to provide input into the business plan throughout 2Q 2023.
- 13 July 2023
 - This meeting provided final input on the draft business plan, and also discussed the process for appointing new Board members in collaboration with IPIM.
- 27 September 2023
 - This was a joint meeting with IPIM and with Anne Burgato and Helen Smith from the executive team; it was hosted as a hybrid event by Kilburn & Strode in London and online.
 - New Board member Sally Bannan spoke about opportunities for collaboration with the epi's Diversity & Inclusion 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.
- The main meeting was followed by informal networking, both in-person and in virtual breakout rooms.

Advisory Board members were also present at the 2023 annual meeting (see 12.1 below), at which the 2022 Chair Ben Buchanan gave an update on their work.

Formal minutes from the Advisory Board’s 2023 meetings are available from the IP Inclusive website⁶⁰.

9.3.4 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. Andrea attended the Board’s February 2023 meeting to supplement this exchange of ideas and updates. Board members also help IPIM with specific projects where necessary: see 9.3.5 below. Conversely, IPIM can provide assistance to the Board for example in connection with its membership succession planning (9.3.6 below).

At the start of 2023, Advisory Board Chair Carol Arnold joined an IPIM meeting specifically to discuss Advisory Board/IPIM interactions and the Board’s general plans for 2023. Among other things, it was agreed that (i) the two joint IPIM/Advisory Board meetings should be longer in 2023 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; and (iii) where appropriate, smaller *ad hoc* working groups could be set up within the Board to provide advice or assistance on specific issues.

9.3.5 Other Advisory Board work

Individual Board members provided IPIM with the following additional assistance during 2023:

- In a project being led by Jonathan’s Voice to upgrade the mental health and wellbeing page of the IP Inclusive website (see 6.2 above), input on content and how the page should look.
- Feedback on a presentation, by our intern Ayaan Ali, about her work on the *Summer of IP* campaign (see 2.2 above).
- Help with identifying a new website services provider (12.2.3 below).
- Representing IP Inclusive at a *Managing IP* awards dinner (7.5.4 above).
- Promoting IP Inclusive at a range of IP-related events and among relevant organisations within and outside the IP sector.

⁶⁰ See <https://ipinclusive.org.uk/newsandfeatures/advisory-board-meeting-minutes-2023/>

9.3.6 Succession planning

According to its terms of reference⁶¹, the Advisory Board’s members are appointed for a three-year term. This can be extended by up to three years in cases where IPIM and the Board agree that “it is appropriate for a member to serve for a longer period due to the nature of their contribution to the Board’s work or to ensure appropriately staggered re-appointments”.

Since most of the current members joined at the Board’s inception in September 2021, some form of rolling succession scheme is needed to ensure that not all step down at once in September 2024 and that the Board continues to represent as wide a range of perspectives as possible. Suitable succession planning and recruitment mechanisms were discussed between the Advisory Board and IPIM during the second half of 2023, as were processes for the appointment of new members. As a result, IPIM and the Advisory Board Chair will now consult with Board members each January regarding their membership plans and preferences (for example, about how long they would like to remain in post). The responses – together with a “skills matrix” that an Advisory Board working group has been compiling to summarise members’ areas of expertise and interest – will help IPIM and the Advisory Board to plan ahead for re-appointing and/or recruiting members to ensure an appropriate spread of expertise and perspectives.

Advisory Board members are of course not bound by their responses to these informal surveys; they are free to step down from the Board at any time should they wish to.

Our processes for the recruitment and appointment of future Advisory Board members will be open and inclusive, as at the Board’s initial creation, and will involve input from both IPIM and the existing Board members.

9.4 Business planning

9.4.1 General

IP Inclusive’s business plans and strategic objectives are decided by IPIM, as are the associated annual budgets. They are based on input from our volunteers and other stakeholders, in particular at the annual meetings, and on recommendations from the Advisory Board. Typically they are prepared by our Lead Executive Officer Andrea Brewster, both IPIM and the Advisory Board having the opportunity to comment on draft versions prior to publication.

9.4.2 The 2023 plan

Our 2023 business plan and budget were published on 24 July 2023². In a departure from previous versions, the plan covered a two-year period, from August 2023 to July 2025. This, together with an intention to establish longer-term strategic plans, aligns with stakeholder suggestions and should increase our capacity to focus on and develop our objectives. We will, however, continue to budget annually – the July 2023 budget covering the period from August 2023 to July 2024 – and will review progress on the current business plan each time we do.

⁶¹ See <https://ipinclusive.org.uk/wp-content/uploads/2021/10/211011-ipi-advisory-board-terms-of-reference.pdf>

Key features of the 2023-25 business 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).
- Increased support and networking opportunities for early-career IP professionals.
- Encouragement and support for inclusive, accessible hybrid working arrangements.
- 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.

In addition to the six high-level objectives set out at 1 above, and the specific things we intend to do in pursuit, the business plan also includes (a) operational changes to equip us to deliver the business plan and to provide improved support for our volunteers; (b) some longer-term strategic plans (with associated stakeholder consultations) to help IP Inclusive pursue its objectives for as long as the need exists; (c) a summary of the things we hope to continue to do as part of our day-to-day activities, which will support the other work; and (d) further “nice-to-have” items suggested by our Advisory Board and annual meeting attendees – these we will attempt to do in 2023-25, resources permitting, and otherwise keep in mind for future business plans.

9.4.3 Delivering on the business plan

In September 2023, the executive team (Andrea Brewster, Anne Burgato and Helen Smith) met to discuss progressing the business plan objectives. Both Anne and Helen have taken responsibility for specific projects (see 10.3 below) and work has already begun on several of these.

Also in September, we held a plenary meeting of community committee leads (see 4.1 above) which, among other things, discussed joint activities to promote and facilitate allyship; these discussions will continue in early 2024 and form a key part of our 2024 event and resource planning.

From 2024 onwards, IPIM will hold a strategy meeting following each of IP Inclusive’s annual meeting, to discuss the initiative’s longer-term plans and strategic development.

10 The executive team

10.1 General

IP Inclusive’s executive team (now fondly referred to as IP Inclusive “HQ”) comprises our Lead Executive Officer Andrea Brewster (see 10.2 below) and two Executive Support staff: Anne Burgato and Helen Smith (10.3 below). Andrea, who is also a member of IPIM, acts for IP Inclusive as a freelance consultant. Anne and Helen are IPIM employees.

10.2 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 2023.

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. This includes:

- Managing and supporting our employees and, when necessary, interns (see 10.3 and 10.4 below).
- Preparing and delivering on our business and strategic plans (9.4 above).
- Overseeing our finances (11 below), preparing budgets and ensuring sufficient funds are raised to deliver on our business plans.
- Representing IP Inclusive in its interactions with external stakeholders and at relevant IP Inclusive and third party events.

Andrea works as a contractor to IPIM. She normally provides 20 hours a week, for which her payment was increased from £2,500 pcm to £2,750 pcm with effect from 1 July 2023; this represents a 10% increase over the period since the LEO was first appointed in July 2019.

Andrea’s workload remained as high in 2023 as in 2022. The support of her executive team (with increased hours from September 2023: see 10.3.2 below) helps make this manageable, although she has provided additional unpaid hours during particularly busy periods. Her contract with IPIM allows some flexibility in working hours, both during each week and over longer periods: her twenty hours a week can be calculated as an average over a period of up to three months in order to accommodate changes in IP Inclusive activity levels, Andrea’s personal commitments and holidays.

The Lead Executive Officer’s 2023 quarterly reports to IPIM are published on the IP Inclusive website⁶². Note that there is no separate report for 4Q 2023; relevant updates are instead incorporated into this Annual Report.

10.3 Executive support

10.3.1 General

Anne Burgato and Helen Smith, both of whom joined our executive team in September 2022, have continued to provide invaluable support for our Lead Executive Officer as well as our wider volunteer base. As hoped, this is allowing us to provide more and better events and resources, strengthen our communication channels (both external and internal), improve support for our communities and other volunteer networks, and in turn ensure that all parts of IP Inclusive work together in pursuit of our strategic objectives.

⁶² See <https://ipinclusive.org.uk/newsandfeatures/lead-executive-officers-reports/>

In both cases their assistance extends not only to administrative matters but also to higher-level involvement in IP Inclusive’s comms, organisation and project management. Both are closely involved with delivering on our latest business plan objectives: see 9.4 above.

A highlight of 2023 was the opportunity for Andrea, Anne and Helen to meet in-person for the first time over lunch in London. This coincided with the 27 September joint IPIM/Advisory Board meeting (see 9.3.3 above) which all three attended, allowing Anne and Helen also to meet key IP Inclusive volunteers.

10.3.2 Anne Burgato

From January to August 2023, Anne Burgato worked eight hours a week, normally on Mondays and Wednesdays from 10 am to 2 pm. Her hours increased to sixteen a week with effect from 1 September 2023 and her usual working hours are now 10 am to 2 pm Monday to Wednesday and 9.15 am to 1.15 pm on Thursdays. At the same time her job title changed from Administrative Support to Executive Support.

With ever-growing workloads, this increase has proved invaluable for extending IP Inclusive’s achievements. Anne’s greater availability, combined with her existing experience here, has in turn allowed us to reduce our provision for intern support in future plans and budgets.

Anne’s current role includes:

- Book-keeping, invoicing, payroll management and other accounting processes.
- Charter signatory liaison, maintenance of our databases of Charter and Senior Leaders’ Pledge signatories and the associated mailing lists, and processing new sign-ups; she has also played a key role in our Charter outreach meetings (see 3.3 above).
- Helping with event management, promotion and comms.
- Creating some event reports and associated follow-up resources.
- Helping with website content updates and social media (in particular LinkedIn) posts.
- Monitoring the main IP Inclusive email accounts and handling associated supporter correspondence.
- Managing our domain name registrations and associated services.
- Providing secretarial support to IPIM, in particular preparing meeting minutes.
- Assisting with the appointment and supervision of this year’s intern (see 10.4 below).
- Coordinating a new programme of allyship-related and/or regional events (see 3.2.5 above), in collaboration with the IP Inclusive communities and our regional supporters; this includes running a survey of our regionally-based supporters (3.2.4 above) to inform our future activities outside London.
- Other general and organisational support for the Lead Executive Officer.

10.3.3 Helen Smith

Helen Smith works eight hours a week, normally on Tuesdays and Wednesdays from 11 am to 3 pm. Her current role as Executive Support includes:

- Coordinating activities and creating content for the Careers in Ideas *Summer of IP* campaign (see 2.2 above).
- Assisting with other Careers in Ideas activities such as its task force meetings and its 2023-24 website rebuild (2.5.1 above).
- Writing formal documents, reports and survey analyses.
- Creating event reports and associated resources such as the “top tips” for *Inclusivity Unlocked!* (5.2 above).
- Producing our fortnightly update newsletter.
- Coordinating activities for the (peri)menopause working group (5.3 above), including help with event organisation and resource collation.
- As part of our work on the 2023-25 business plan, creating (a) an EDI “starter pack” for new recruits and (b) collated guidance on allyship, in both cases working with our five communities and incorporating outcomes from relevant events.
- Assisting Jonathan’s Voice with an update to our website mental health and wellbeing page (6.2 above).

10.3.4 Employment terms

Both Helen and Anne are formally employed by IPIM and report directly to our Lead Executive Officer Andrea Brewster. They work virtually, from their own homes.

They have a good deal of flexibility in their working patterns. They can change their exact hours, by agreement with Andrea, to fit with childcare and other commitments, as well as to accommodate IP Inclusive activities and events. They can if they wish take extra unpaid leave and/or work time in lieu for example to fit around school holidays. IP Inclusive also takes a flexible approach to public holidays, which our employees can take as paid leave on any working day they choose.

Their salaries are reviewed annually. This year both were increased by around 7.6% with effect from 1 August 2023.

10.3.5 Management

Andrea holds weekly catch-up meetings with both Anne and Helen to review their workloads, share ideas and updates and plan for the week ahead. She also conducts six-monthly informal reviews and exchanges of expectations with each of them; during 2023 these took place in March and September. The reviews yielded positive feedback all round, with our flexible working arrangements functioning particularly well on all sides and enthusiasm for the future development of both employees’ roles.

Although the weekly catch-ups provide a forum in which all three executive team members can raise queries, concerns and suggestions, we have also given Anne and Helen the opportunity to meet individually with another IPIM member so as to discuss their roles at IP Inclusive with someone other than their immediate line manager. These informal discussions were held online in December 2023; the IPIM members involved will feed back to Andrea and/or other IPIM members as appropriate, for

example if the discussions raise significant matters regarding Andrea’s management performance or other HR points.

Both employees are encouraged to develop their roles and responsibilities at IP Inclusive in whatever ways they feel comfortable with. Additional training is provided where appropriate, for example the website CMS training for Helen referred to at 12.5 below and the digital accessibility training discussed at 5.6.3 above. It is fair to say that both Anne and Helen have also brought valuable experience and ideas into IP Inclusive, from which Andrea and many of our volunteers have benefited.

10.4 Intern

The law firm Clifford Chance kindly offered us another of their “LIFT” interns in 2023, under a scheme in which they pay a future trainee to work with a partner organisation for four weeks in order to acquire additional business and professional skills. They provided us with a shortlist of three very suitable candidates, from which (following interviews) we selected Ayaan Ali.

Ayaan’s internship lasted from 12 June to 7 July 2023. During that time she provided valuable help in promoting our *Summer of IP* campaign (see 2.2 above) to schools, universities, outreach charities and IP sector recruiters, building several new contacts for Careers in Ideas.

She also:

- Revived the Careers in Ideas Instagram account, in particular to promote *Summer of IP* but also creating new general content.
- Met with several IP professionals to learn about their careers in IP.
- Attended an IP & ME coffee date (see 4.2.2 above) and a Charter signatory outreach meeting (3.3 above).
- Prepared and delivered a presentation to members of the Careers in Ideas task force, the Advisory Board and IPIM, regarding her work on *Summer of IP* and its longer-term value as well as her more general experiences with IP Inclusive.
- Provided a website News and Features post about her internship.

Ayaan worked from home: as with our 2022 intern Susan Nelson, her entire internship, from interview and appointment onwards, was conducted online. Overall Ayaan’s was a successful internship and she appeared to be pleased with what she had learnt with us.

We are delighted that Clifford Chance have agreed to provide us with another of their LIFT interns in 2Q 2024; we hope in particular that this person will help us with *Summer of IP 2024*.

11 Financial matters

11.1 General

IPIM is responsible for IP Inclusive’s financial affairs. Its 2023 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 to 31 December 2023.

Gordon Harris continued in post as IPIM Treasurer during 2023. The day-to-day financial management is delegated to our Lead Executive Officer Andrea Brewster, assisted by Anne Burgato.

At the end of 2023 IP Inclusive had a healthy bank balance, which included a £13,000 ring-fenced contingency fund (see 9.2.5 above). With the donations raised or pledged so far in the 2023-24 fundraising round, together with a small surplus from 2022-23, it will be able to continue to operate to at least the end of the current budgeting period (August 2023 to July 2024).

11.2 Accounting systems and banking

11.2.1 Accountancy and book-keeping

IPIM has appointed the Haines Watts Group to act as its accountants, working with the Bristol branch office. They provide guidance on IPIM’s tax and reporting as well as general financial affairs, and prepare formal end-of-year financial reports; due to IPIM’s entity status, these reports do not at present need to be submitted to any official authorities.

IPIM has purchased HMRC enquiry fee protection through Haines Watts, for the year beginning 1 April 2023; this covers accountants’ fees in the event of a (random) tax inspection.

IPIM’s financial records and day-to-day book-keeping are managed on the cloud-based accounting platform Xero⁶³. Its Xero account is linked with its bank account. Haines Watts host and manage the Xero subscription for us.

11.2.2 Payroll

Haines Watts also provide us with outsourced payroll services for our employees. This includes administration of our NEST auto-enrolment pension scheme, which became necessary in 3Q 2023 on increasing Anne Burgato’s working hours (see 10.3.2 above).

11.2.3 Bank account

IPIM currently banks with Lloyds Bank plc. CITMA’s Chief Executive Keven Bader established the account for us under the umbrella of CITMA’s existing relationship with Lloyds, and has kindly continued to manage it for us since.

In late 2023 IPIM applied for its own separate bank account: a Royal Bank of Scotland (RBS) “community” account designed especially for unincorporated, community-oriented groups with

⁶³ See <https://www.xero.com/uk/>

turnovers below £100,000 pa⁶⁴. This account offers 24/7 online and phone banking, contactless debit cards and up to four authorised signatories; it also carries no bank charges. Our application has been accepted and we are hopeful that we will be able to switch our funds from the Lloyds to the new RBS account early in 2024.

11.3 Fundraising

IP Inclusive is funded purely through voluntary donations⁶⁵. We still feel it is important, for inclusivity, that our events and resources be 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. By the end of 2Q 2023 we had raised £54,810.00 of our £80,000 target for the year from August 2022 to July 2023; along with a reserve of £27,000 from the previous year’s budget, this was ample to cover the 2022-23 operations and still left us with a small reserve as we entered the next budgeting year (August 2023 to July 2024). This reassures us that our chosen model is both appropriate and effective. Some donations are given for specific projects, for example the Careers in Ideas website and Mentoring Hub or particular operational expenses. The rest we are free to allocate to any part of our published budget and business plans.

The 2023-24 campaign was launched in August 2023 through our mailing lists, website and social media comms. We have been pleased by the level of support received so far, including some from the law firm Charter signatories with whom we engaged via the outreach meetings described at 3.3 above. By the end of 2023 we had raised £46,125.00 of our £88,000 target. In early 2024 we will make renewed efforts to reach out to supporters who have not yet responded to our fundraising requests, in order to get closer to the target.

Should we be unable to raise the full £88,000 we may have to delay some of the optional projects suggested in the 2023-25 business plan. However, day-to-day activities should not suffer and the ring-fenced contingency fund (see 9.2.5 above) remains secure.

12 Other operational matters

12.1 Annual meeting

IP Inclusive’s 2023 annual meeting was held online on 18 April, from 10 am to midday. Despite an unfortunately-timed outage of the Eventbrite website, it brought together a good range of IP Inclusive stakeholders from across the sector. The meeting was open to all UK-based IP professionals; personal invitations were sent to representatives from key IP sector organisations.

⁶⁴ See <https://www.rbs.co.uk/business/bank-accounts/community-bank-account.html>

⁶⁵ See <https://ipinclusive.org.uk/ip-inclusive-fundraising/>

As usual we heard updates from our communities, networks and working groups, and from IPIM and its Advisory Board. The subsequent breakout discussions yielded valuable feedback to help shape our 2023-24 priorities and plans. The meeting also incorporated the formal IPIM AGM (see 9.2 above).

Our 2024 annual meeting has been fixed for 16 April, again from 10 am to midday. It will have a hybrid format, in-person in London and also online, and is being kindly hosted by Allen & Overy.

12.2 Websites

12.2.1 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 2023 we published 56 “News and Features” posts on the site³¹, and 20 items on its resources page²⁶. Our events page³⁰ carried posts for 44 events that took place in 2023, one of which posts was itself a summary of all the introductory events in the *Summer of IP* campaign (see 2.2 above). These posts are described in more detail at 5 – in particular 5.4 and 5.5 – above.

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

12.2.2 The Careers in Ideas website

The Careers in Ideas website (<https://careersinideas.org.uk/>) sees less use than the main IP Inclusive one. See 2.5.1 above for more information about its 2023 content and its current redevelopment.

12.2.3 Administration, hosting and maintenance

Until November 2023, both websites were hosted by Making Websites Better Ltd (MWB), which – under its former name Visix Ltd – designed and developed them. This arrangement allowed us continued access to people who were well placed to maintain and if necessary develop the sites.

During 3Q 2023, however, with help from Advisory Board member Pete Fellows (Fellows and Associates), we began reviewing our website hosting and maintenance arrangements and looking into more cost-effective and responsive alternatives. We identified VTS Web Services (VTS) as a better fit for an organisation of IP Inclusive’s size and resources, and transferred the hosting of both the IP Inclusive and the Careers in Ideas websites to them.

We have also appointed VTS to build our new Careers in Ideas site for us (see 2.5.1 above).

During 2023 two improvements were made to the IP Inclusive website, the first carried out by the then hosts MWB and the second by VTS:

- In March, a minor change to the CMS editor to allow us to alter the colours of post titles to improve their readability over background images.

- In December, incorporation of a panel feature that will provide a clearer format for our new mental health and wellbeing landing page (see 6.2 above).

12.2.4 Domain name registrations

The registrations for our IP Inclusive and Careers in Ideas domain names were originally acquired for us by Lee Davies, Chief Executive of CIPA. Until this year they had been held on trust for IPIM by CIPA, who also funded their annual renewals.

In June CIPA transferred formal ownership of the domain names to IPIM, which now owns the registrations for both ipinclusive.org.uk and careersinideas.org.uk. Both are held with Ionos Cloud Ltd; our accounts include “Domain Guard” protection against third-party access and threats, and associated email addresses.

During 4Q 2023 we transitioned our internal and external email traffic (including general supporter correspondence, event comms and Charter signatory comms) to the new addresses @ipinclusive.org.uk and @careersinideas.org.uk. The new email accounts are accessed and administered via a webmail system, to which both Andrea Brewster and Anne Burgato have full access. They carry some associated data storage, although for the time being we will continue to use shared Google drives for internal document exchange and storage.

12.3 Other comms

12.3.1 Social media

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. However, apparently in line with other IP sector organisations, we are making increasing use of LinkedIn now and less of X (formerly Twitter); this is partly due to concerns about content moderation under X’s new management. The communities (see 4 above) have also seen smaller increases – and in some cases decreases – in their follower numbers on X, but conversely they and our other networks have had significant increases in their LinkedIn and mailing list followings.

In July we established an IP Inclusive company page on LinkedIn⁶⁶. This has acquired a good following and has proved useful for sharing news, promoting our events and resources, requesting help and facilitating informal dialogue with our stakeholders. We now publish our fortnightly newsletters on the page as well as circulating them via the Mailchimp mailing lists (see 12.3.2 below); it has also carried important announcements such as about our *Summer of IP* campaign, our business plan and our 2023-24 fundraising campaign.

At the start of 2024 the page had 649 followers and was generating a good level of activity (shares, likes, etc – plus tags from other organisations’ posts). Our LinkedIn discussion group, for more

⁶⁶ See <https://www.linkedin.com/company/98183780/>

private and user-driven conversations within our community, had 729 members at the start of 2024 compared to 687 at the start of 2023.

IP Inclusive’s X account (@IPInclusive) had 2,173 followers at the start of 2024, compared to 2,144 at the start of 2023.

Our networking and support communities have their own LinkedIn groups and/or pages and (again less used) X accounts, through which they raise awareness of more specific issues. IP Ability (see 4.3 above) also has a Facebook account, whilst Careers in Ideas has dedicated LinkedIn, X and Instagram accounts (2.5 above).

12.3.2 Mailing lists

We use our Mailchimp mailing lists⁶⁷ (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- and wellbeing-related developments. The IP Inclusive Updates list had 1,011 subscribers at the start of 2024, compared to 891 at the start of 2023. 698 people had subscribed to notifications of new News and Features posts on our website, compared to 597 at the start of 2023. During the year we sent roughly fortnightly emails to the IP Inclusive Updates subscribers, with copies to the Charter EDI officers, as well as *ad hoc* event notices to relevant subscribers.

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 website⁶⁸.

12.4 Online accounts

Where possible we use free accounts for our IT and admin support, but certain functions have proved worth paying for. We currently subscribe to:

- A Mailchimp “Essentials” plan. 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 notices about specific activities and events. Notifications of website News and Features posts are also sent out through Mailchimp for those who subscribe to them.
- A SurveyMonkey “Standard” plan, which has been useful for collecting and analysing stakeholder feedback as well as for more focused research in the IP professions.
- An Eventbrite “Flex” plan, which charges us per event depending on the number of tickets allocated. This platform has proved incredibly valuable for event promotion, registrations and comms; it links well to our website event posts and to our Zoom account for access to online events.

⁶⁷ See <https://ipinclusive.org.uk/stay-in-touch/>

⁶⁸ See <https://ipinclusive.org.uk/privacy-policy/>

We will keep the SurveyMonkey and Eventbrite subscriptions (the latter only having begun charging for its services in 3Q 2023) under review, and will consider switching to less costly alternatives such as Google Forms where feasible.

We also have access to a Zoom “Pro” account for hosting our meetings and events and for creating longer-term resources such as event or informational recordings. The Zoom account is shared with, and funded by, our Lead Executive Officer Andrea Brewster.

Our YouTube account remains free for the time being and sees extensive use as a platform for both event recordings and more general resources. During 2023 we posted 35 videos on it; these included nineteen event recordings, thirteen *Summer of IP* resources (see 2.2 above) and three menopause “stories” created by our (peri)menopause working group (5.3 above) for publication in early 2024. We publish our videos “unlisted” to reduce spam and trolling problems; decisions about whether or not (or how much) to record or to publish recordings are generally guided by speaker preferences and advice, depending on the subject matter.

12.5 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 X accounts.

The IP Inclusive website is curated by Andrea Brewster and Anne Burgato with some help from Jonny Lerwill (Airbus Defence & Space). Helen Smith is also now receiving training on the site’s CMS editor, with a view to helping post content relating to Careers in Ideas, (peri)menopause support and event reports. Helen will also help curate the new Careers in Ideas website (see 2.5.1 above).

Anne manages most of our LinkedIn, events-related and Charter signatory comms, whilst Helen produces the update newsletters. Our intern Ayaan Ali also created and posted Instagram content for Careers in Ideas: see 10.4 above.

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

13 Acknowledgements

13.1 General

IP Inclusive would like to thank everyone who helped to make 2023 a success, including those who donated funds; hosted or organised events; spoke or introduced speakers; 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 *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 (peri)menopause working group, the Mental Health First Aiders' Network and the Advisory Board; and to the IPIM 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 assisting with the formal handover of our domain name registrations, and to Keven Bader and Joy Dublin at CITMA for looking after the IPIM bank account.

13.2 2023 donors

During the first half of 2023 we received further donations towards our 2022-23 business plan (including the associated operating costs) and for specific Careers in Ideas activities from Haley Guiliano International, The IP Federation, the IPO, IPReg, Schlich Ltd and Williams Powell. IP Out also received a dedicated donation from Triona Desmond.

Thus far the following organisations have contributed to our 2023-24 fundraising campaign: 11 South Square, Abel + Imray, Appleyard Lees, Bird & Bird, Boulton Wade Tennant, Bristows, CIPA, Forresters, Haseltine Lake Kempner, Herbert Smith Freehills, Hindles, IPReg, John Gray IP Ltd, Mewburn Ellis, Mishcon de Reya, Murgitroyd, Potter Clarkson, Powell Gilbert, Stratagem IPM and Viatrix.

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.

13.3 Event organisers and hosts

We have been grateful to the following organisations who have provided real-life venues and refreshments (in many cases with additional online access) for our 2023 events: Carpmaels & Ransford, EIP, Finnegan Europe, HGF, Gowling WLG, Mathys & Squire, Mewburn Ellis, Murgitroyd, Page White Farrer and WilmerHale. We would also like to thank CIPA, CITMA and Illuminate VR for hosting online meetings for or with us.

Our *Summer of IP* outreach campaign (see 2.2 above) saw a large number of IP sector organisations organising and hosting events and activities, both online and in-person. For these we are grateful to AA Thornton, Abel + Imray, Boulton Wade Tennant, Burley Law, D Young & Co, Forresters, HGF, the IPO, J A Kemp, Marks & Clerk, Mathys & Squire, Mewburn Ellis, Mishcon de Reya, Potter Clarkson, Powell Gilbert, Reddie & Grose, Sagittarius IP, Serle Court Chambers, Venner Shipley and Viatrix.

Several other organisations have shared their online meeting facilities for IP Inclusive activities, for example committee and working group meetings, individual sessions of the IP & ME and Women in IP coffee dates, or the creation of recorded resources. 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.

13.4 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 2023 projects and who continue to provide support, advice, ideas and welcome opportunities for our supporters to benefit from their work.

13.5 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.

14 Notes

Unless otherwise stated, references in this report to numbers of EDI Charter signatories, mailing list subscribers, X and Instagram followers, and LinkedIn and Facebook group members “at the start of 2024” were recorded on 2 January 2024. Those listed for “the start of 2023” are taken from the 2022 Annual Report⁵⁶ and were mainly recorded on 3 January 2023.

Annex I: IP Inclusive Management 2023 Financial Report

I.1 Formal matters

IP Inclusive Management (IPIM) is an unincorporated association and is not VAT-registered. In accordance with its constitution⁵⁴, it operates on a not-for-profit basis. All income is used to pursue the IP Inclusive objectives⁶⁹ 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 currently banks with Lloyds Bank plc. CITMA’s Chief Executive Keven Bader continues to manage this account for us, having established it originally. We are in the process of switching to a new RBS “community” account: see 11.2.3 above.

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 and pension scheme management and associated financial advice.

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

I.2 Summary of 2023 finances

Opening bank balance 1.1.23:	£63,536.77
Income:	£55,935.00
Expenditure:	£62,630.21
Closing bank balance 31.12.23:	£56,841.56
(incl ring-fenced contingency fund)	(£13,000.00)
Creditors at 31.12.23:	£0
Debtors at 31.12.23:	£0

⁶⁹ 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 2023 income and expenditure

	In £	Out £
Income:		
General donations towards the 2022-23 business plan	6,510.00	
General donations towards the 2023-24 business plan	33,625.00	
Donation for Careers in Ideas website rebuild	10,000.00	
Donation to IP Out	800.00	
Donations towards 2022-23 & 2023-24 operating costs	5,000.00	
	<hr/>	
Total	55,935.00	
Expenditure:		
Lead Executive Officer fees		31,057.69
HR costs ⁷⁰		21,018.69
Executive team expenses ⁷¹		914.73
Accountants' advice, Xero subscriptions and payroll charges		584.40
MentorLoop subscriptions for Careers in Ideas		6,033.60
Deposit for Careers in Ideas website rebuild		504.00
IP Out event speaker fee		610.60
Other operational costs ⁷²		1,906.50
		<hr/>
Total		62,630.21

⁷⁰ Includes salaries, tax, NI, pension contributions and Christmas bonuses

⁷¹ Includes travel expenses for the Lead Executive Officer (LEO) and executive support staff plus LEO's basic office expenses

⁷² Includes bank account charges, Mailchimp and SurveyMonkey subscriptions, Eventbrite charges, insurance, website hosting, domain name registrations, ICO data protection fee and small *ad hoc* website modifications

Annex II: IP Inclusive contact details

IP Inclusive	Website: https://ipinclusive.org.uk/ LinkedIn page: https://www.linkedin.com/company/98183780/ LinkedIn group: "IP Inclusive" https://linkedin.com/groups/8473869 X: @IPInclusive Emails: General (incl fundraising) queries: contact@ipinclusive.org.uk Charter queries: charter@ipinclusive.org.uk Events queries: events@ipinclusive.org.uk Data protection queries: The Data Protection Officer at data@ipinclusive.org.uk
IP & ME	Website: https://ipinclusive.org.uk/community/ip-me/ LinkedIn page: https://www.linkedin.com/in/ipandme/ LinkedIn group: "IP Inclusive: IP & ME" https://linkedin.com/groups/12049564 X: @ipinclusiveIPME Email: IPandME.IPInclusive@gmail.com
IP Ability	Website: https://ipinclusive.org.uk/community/ip-ability/ LinkedIn group: "IP Inclusive: IP Ability" https://linkedin.com/groups/13756630 X: @IP_Ability Facebook: "IP Ability community" https://www.facebook.com/groups/3125107824186976 Email: IPAbilityNetwork@gmail.com
IP Futures	Website: https://ipinclusive.org.uk/community/ip-futures/ LinkedIn page: https://www.linkedin.com/in/ip-futures-12422b187/ LinkedIn group: "IP Inclusive: IP Futures" https://linkedin.com/groups/8792265 Email: ipfuturesinclusive@gmail.com
IP Out	Website: https://ipinclusive.org.uk/community/ip-out/ LinkedIn group: "IP Out Network" https://linkedin.com/groups/8488373 X: @ip_out Email: IPOutNetwork@gmail.com

Women in IP	<p>Website: https://ipinclusive.org.uk/community/women-in-ip/</p> <p>LinkedIn group: "IP Inclusive : Women in IP" https://linkedin.com/groups/8557958</p> <p>X: @WomeninIPI</p> <p>Email: womeninipnetwork@gmail.com</p>
Careers in Ideas	<p>Website: https://careersinideas.org.uk/ (see also https://ipinclusive.org.uk/careers-in-ideas/)</p> <p>LinkedIn page: https://www.linkedin.com/company/careers-in-ideas-initiative/</p> <p>LinkedIn group: "Careers in Ideas" https://linkedin.com/groups/12376993/</p> <p>X: @CareersInIdeas</p> <p>Instagram: "careersinideas" https://www.instagram.com/careersinideas/contact@careersinideas.org.uk</p> <p>Email: contact@careersinideas.org.uk</p>
Regional networks	<p>Website: https://ipinclusive.org.uk/our-regional-edi-charter-networks/</p> <p>North of England: https://www.linkedin.com/groups/8931689/ipinclusivenoe@gmail.com</p> <p>Scotland: https://www.linkedin.com/groups/9028398/ipinclusivescotland@gmail.com</p>
Mental Health First Aiders' Network	<p>Website: https://ipinclusive.org.uk/newsandfeatures/our-support-network-for-mental-health-first-aiders/</p> <p>LinkedIn group: "IP Inclusive MHFAer Support Network" https://www.linkedin.com/groups/12424438/</p>
The EDI Charter	<p>Website: https://ipinclusive.org.uk/about/our-charter/</p> <p>Email: charter@ipinclusive.org.uk</p>
IP Inclusive Management (IPIM)	<p>Website: https://ipinclusive.org.uk/ip-inclusive-management/⁷³</p> <p>Contact via: contact@ipinclusive.org.uk</p> <p>Chair: Michael Silverleaf KC</p> <p>Secretary: Clair Curran</p> <p>Treasurer: Gordon Harris</p> <p>Lead Executive Officer: Andrea Brewster; andrea.brewster@ipinclusive.org.uk</p> <p>Written correspondence: c/o CIPA, 2nd Floor, Viaro House, 20-23 Holborn, London EC1N 2JD</p>

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/>
Chair: Carol Arnold
Secretary: Josh McLennon