

Senior leaders’ diversity think tank meeting 27 February 2024



“Creating an EDI data blueprint”

Venue: Zoom
Timing: 4-5.30 pm
Chair: Andrea Brewster, Lead Executive Officer, IP Inclusive

Agenda

- 1600-1605 **Chair’s introduction, welcome and housekeeping**
Brief explanation of the meeting format and objectives
- 1605-1635 **Panel discussion**
Insights from CIPA, CITMA, The IP Federation and IPReg about their approaches to EDI data gathering

Plus an opportunity for delegates to ask questions of, or provide feedback to, the panellists
- 1635-1700 **Breakout sessions**
Group discussions in line with the brief below
- 1700-1725 **Plenary: collating discussion points**
Sharing feedback from the breakout rooms
- 1725-1730 **Chair’s summing up and next steps**

Meeting objectives

The aim of this meeting is to gather ideas on a joined-up approach to EDI data gathering for the patent and trade mark professions.

Our 2023 discussions with The IP Federation covered, among other things, the EDI data that corporate clients now demand. IPReg is also considering asking regulated patent and trade mark firms to submit diversity data in the future. To help with this, IP Inclusive would like to create a cross-sector approach that allows us all to gather EDI data more confidently, increases its credibility for clients, and also helps individual organisations benchmark their data against the sector as a whole.

Working alongside CIPA, CITMA, The IP Federation, IPReg and the UK IPO, our aim is to create:

- A template data gathering survey (a sort of basic-level voluntary standard)
- Some accompanying guidance and/or signposts to useful resources elsewhere

This think tank meeting will discuss the proposed approach, and more specifically an initial draft template and the resources that should accompany it.

The brief for the breakouts

The breakouts will focus on a draft template EDI survey which will be circulated in advance of the meeting. This is an early-stage document; all feedback and suggestions are welcome.

Attendees will be randomly allocated to breakout rooms. As usual there won't be any appointed facilitators, so please select someone in your group to be a "rapporteur" and feed your ideas back to the following plenary discussion.

We'd like to explore two key themes:

1. Your views on the template survey
 - How helpful is it likely to be to your organisation, and would you be able to use it?
 - Does it include the right questions, ie covering things that you and your clients need to know?
 - Are there any questions you'd prefer to see moved between Parts I (standard questions) and II (optional extras), or removed altogether?
 - Do you have any other suggestions about its content or format, or the language used in the questions?
2. Your thoughts about accompanying guidance
 - What would you and your colleagues find helpful?
 - What balance would you prefer between signposting to external resources and more bespoke guidance for the patent and trade mark professions?

- Do you know of specific content we could include, and/or professionals who could help us compile it?

We'd also appreciate:

3. Your thoughts more generally about the proposed cross-sector approach to EDI data gathering, and about making it robust, credible and feasible as well as valuable for your own organisation's EDI strategies.

Please note:

This meeting is intended as a frank and open discussion. Although the outcomes will be published, the discussions will not be recorded and we would ask you please not to tweet or take screenshots during the meeting and to keep its contents confidential.

"Chatham House" rules apply: no one should disclose afterwards who said what in the meeting.