Minutes of
IPIM General Meeting (Strategy Session)

Date: 22 September 2026

Meeting convened in person at British Associated Foods (with Clair Curran joining via Teams)

Present: James St Ville (IPIM Chair), Clair Curran (IPIM Secretary), Gordon Harris (IPIM Treasurer), Andrea Brewster (Lead Executive Officer), Alicia Chantrey, Lesley Evans, Michael Silverleaf, Robert Andrews, Helen Smith and Anne Burgato

Apologies: Ese Akpogheneta.

1. Purpose of the Strategy Session

The meeting was held as a strategic discussion, distinct from routine operational meetings, to consider:

- External trends affecting IP Inclusive.
- The future direction of the organisation.
- Funding and sustainability.
- Succession planning and leadership transition.

2.Horizon Scanning and External Trends (facilitated by Alicia and Robert)

Participants identified a range of political, economic, social and technological trends that may affect IP Inclusive in the coming years.

Key themes raised

- Increasing employer-driven recruitment markets.
- Decline in UK manufacturing and associated leadership opportunities.

- Mental health challenges affecting younger professionals.
- Backlash against EDI initiatives and increasing activism against diversity programmes.
- Importance of social mobility as a unifying and broadly supported theme.
- Return-to-office policies and increasing geographic centralisation.
- Financial pressures reducing participation and volunteering.
- Growth of AI and automation in both recruitment and professional work.
- Geopolitical instability, protectionism and reduced international cooperation.
- Changes in higher education participation and routes into the professions.
- Increased influence of social media on knowledge-sharing and public discourse.
- Climate change, cybersecurity and broader societal pressures competing for attention and resources.

Discussion Outcomes

The Board agreed that:

- IP Inclusive must remain alert to changing external conditions.
- Regular "horizon scanning" should become part of strategic thinking.
- The organisation should maintain relevance by adapting its messaging while remaining true to its core purpose.

---

3. Strategic Themes

Theme 1: Changing Language and Expectations Around Inclusion

A presentation highlighted changing attitudes towards diversity and inclusion.

Key observations

- Public discourse around inclusion is evolving.
- Organisations are increasingly reframing inclusion initiatives around measurable outcomes.
- Social mobility is becoming a particularly important focus area.

- Women's health, caring responsibilities and wellbeing remain significant topics.
- Storytelling and lived experiences are becoming increasingly important communication tools.
- There is a risk that organisations working in inclusion could become less relevant if they fail to adapt their messaging.

Discussion outcomes

The Board generally agreed that:

- IP Inclusive's work remains highly relevant.
- The organisation should evolve its language and framing where appropriate.
- Social mobility, wellbeing and inclusion remain strong areas for future focus.
- The objective should be evolution of messaging rather than a change in mission.

Theme 2: AI and Technology

AI was identified as a major strategic issue affecting:

- Recruitment.
- Entry routes into the profession.
- Skills development.
- Employment levels.
- Professional practice.
- Wellbeing and "techno-stress".

Key concerns

- Reduced opportunities for junior professionals.
- Overreliance on AI-generated outputs.
- Pressure on learning and critical-thinking skills.
- Disruption to traditional professional roles.

- Increased uncertainty in workforce planning.

Discussion outcomes

AI was recognised as a major long-term trend that IP Inclusive should continue to monitor and consider when designing future initiatives.

---

4. Direction of Travel (Next Three Years) (Facilitated by Lesley and Gordon)

The Board discussed future strategy using the 2025 Impact Report as a starting point.

General consensus

IP Inclusive should:

- Continue its successful core activities.
- Build upon existing strengths.
- Avoid unnecessary structural or strategic upheaval.
- Focus on:
    - "evolution, not revolution."
    - Community building.
    - Safe spaces.
    - Social mobility.
    - Mental wellbeing.
    - Collaboration across the IP sector.

Gordon raised the concept of “fairness” rather than referring to EDI.

Discussion outcomes

The Board agreed on the importance of:

- Bringing in new voices and perspectives.
- Maintaining multi-generational representation.
- Planning for gradual IPIM board refreshment and succession.

---

5. Funding and Sustainability

A funding analysis was presented by Lesley Evans.

Key findings

Funding currently comes predominantly from:

- Patent and trade mark attorney firms (~46%).
- Professional bodies and organisations (~34%).

Together these account for approximately 80% of income.

Discussion outcomes

The Board agreed that:

- Future fundraising efforts should be more targeted for the likely main contributors.
- Relationships with patent and trade mark attorney firms remain critical.
- Multi-year pledge arrangements would improve financial certainty.
- Better access to decision-makers within firms is needed.
- Fundraising should focus on demonstrating value and impact.

Charity status

There was discussion regarding charity status.

Consensus:

- Charity conversion is not a current priority.

- The option could be kept under review and should not be permanently ruled out.

---

6. Succession Planning (Facilitated by Andrea and Julie)

The Board discussed plans for Lead Executive Officer (LEO) transition.

LEO transition

- Andrea intends to step down from the Lead Executive Officer role by the end of 2027.
- A gradual reduction in responsibilities is envisaged.
- Andrea would like to remain involved with IP Inclusive after stepping down as LEO, for example on IPIM.

Executive Team

Discussion focused on expanding the responsibilities of Anne and Helen. IPIM expressed confidence in their ability to take on additional leadership responsibilities over time.

Future leadership model

A broad consensus emerged around:

- Retaining executive functions within the existing executive team.
- Creating an honorary external "President" or figurehead role.
- The President would:
    - Provide profile and visibility.
    - Support stakeholder engagement.
    - Assist with fundraising and external relationships.
    - Work closely with the executive team.

- Be separate from day-to-day operational management.

Additional points

- One or both of the Executive Team should attend IPIM meetings.
- Further work is required on role descriptions and governance arrangements (e.g. line management).
- The possibility of a Vice President role was mentioned for future consideration.

---

7. Advisory Board

Discussion

The role of the Advisory Board was considered in the context of helping with the above outcomes and providing additional horizon-scanning input. Lesley and Robert would liaise with the Board over specific projects. Robert would assume full responsibility for IPIM-Advisory Board liaison when Lesley stepped down from IPIM at the end of 2026.

Actions

Horizon Scanning

1. **Alicia** to circulate presentations and “thought cloud”.

Succession Planning

1. **Andrea, Anne and Helen** to develop a high-level succession model, including:
    - Proposed future structure.
    - Role descriptions.
    - Transition timeline.

- Training and development requirements.

Initial proposals to be circulated ahead of the IPIM November meeting.

Funding

1. **Gordon** to engage with the Intellectual Property Lawyers Association (IPLA) regarding raising awareness and support for IP Inclusive.
2. **All** – Consider how to (a) Improve access to decision-makers within major contributor organisations and (b) increase multi-year funding pledges.

Meeting closed following review of conclusions and actions.

Thanks to Alicia and to British Associated Foods for hosting.