

## **UPDATE-JANUARY 2024**

### **Patent Examination Board (PEB) Three Year Operational Plan (September 2022 – September 2025)**

#### **Our vision**

Our vision is to award qualifications that are recognised as the highest standard within the IP profession.

#### **Our strategic aims**

We will achieve our vision by concentrating on three strategic aims:

Aim One	To develop and deliver assessments that are valid, reliable, and fit for purpose.
Aim Two	To provide clear and accessible information to all stakeholders regarding our results and processes.
Aim Three	To ensure, in collaboration with CIPA, the long term financial and operational sustainability of the PEB.

#### **Success**

We will measure our success through the following means:

Measure One	Feedback from our stakeholders.
Measure Two	External and internal reviews of the quality of our assessments.
Measure Three	Our financial and operational performance.

#### **Initiatives**

In addition to our business as usual activities, we will undertake a range of initiatives over the cycle of this Operational Plan, which will advance our Strategic Aims.

**One major initiative underpins this planning cycle and will be the central focus of our activities over the three year period:**

*We will undertake a general review of the FC and FD syllabi and assessment methods. In undertaking this review, we will develop a project plan, engage with our stakeholders, and implement all changes which we determine to be necessary in order to ensure that our assessments are valid, reliable and fit for purpose. [PROJECT ONE]*

**January 2024 Update:** The review is underway. An overall project plan has been designed and engagement with stakeholders has begun. The GB has approved overarching assessment principles and a unit syllabus template. A new assessment strategy has been produced. FD4 syllabus, assessment method, and specimen question paper have been drafted by the Development Group. The PEB GB was updated at the December 2024 PEB GB meeting, and endorsed the proposals. This work will serve as a blueprint for the other FC and FD examinations. This work will continue throughout 2024..

Other initiatives will be undertaken to further support the Strategic Aims of the Plan, as follows.

**During the period September 2022 to September 2023 we will aim to:**

*Design and commence delivery of an implementation plan by which we will fully meet the requirements and recommendations of the IPReg Assessor Report on the delivery of the FD examinations. [PROJECT TWO]*

**January 2024 Update:** Progress against the agreed implementation plan continues. It is monitored and updated on a regular basis. PEB GB has oversight of the plan.

*Begin the implementation of a set of actions in response to the Mercer Review. [PROJECT THREE]*

**January 2024 Update:** Actions related to the Mercer Review recommendations have been incorporated into the implementation plan. Progress is being made and this is being monitored.

*Commission external research into the FD4 syllabus and assessment so as to ensure that it is valid, reliable and fit for purpose. This research in turn will feed into the general curriculum and assessment review. [PROJECT FOUR]*

**January 2024 Update: The Development Group met three times in autumn 2023 to consider syllabus and assessment of FD4. Revisions to syllabus and assessment methods were agreed in principle by the PEB GB at the December 2023 meeting.**

*Continue to work with CIPA and the Candidate Consultative Committee to refresh and improve the PEB website. [PROJECT FIVE]*

**January 2024 Update: the website re-design project has been developed following consultation by CIPA with the PEB and the “Informals”. However, the work on re-developing the website has been delayed by CIPA.**

*Establish a finance sub-group of the Governance Board of the PEB in order to provide strategic oversight of our finances and strengthen our liaison with CIPA so as to ensure our long term financial sustainability. [PROJECT SIX]*

**January 2024 Update: A sub-group of PEB GB members now regularly meets informally with CIPA representatives to discuss the accounts and budget. This will be formalised as a subcommittee of the PEB GB in 2024. The meetings provide the PEB GB with greater oversight and allows the PEB GB to plan more effectively.**

*Implement a structured system for performance review and appraisal of all PEB examiners. [PROJECT SEVEN]*

**January 2024 Update: The appraisal system for examiners is now being implemented. This is now business as usual.**

*Undertake an analysis of whether our assessments are in keeping with best practice in relation to the promotion of equality, diversity and inclusion. [PROJECT EIGHT]*

**January 2024 Update: Consultation with an external EDI expert has taken place and a discussion paper was considered by PEB GB. Equality, diversity and inclusion considerations are being taken into account throughout the assessment design project. Further work on EDI will be considered by the PEB GB following the completion of the redesign.**

*Gather and communicate more granular data and narrative on the examination performance by candidates, in terms of relative pass rates for first sitting and for all subsequent resits. [PROJECT NINE]*

January 2024 Update: Data has been produced and was included in the 2022-2023 Annual Report to IPReg. It has been added to the website for the benefit of stakeholders.

**During the period September 2023 to September 2024, in addition to continuing relevant activities from the previous period, we will aim to:**

*Collaborate with CIPA and stakeholders on the launch and delivery of the proposed APAC qualification. [PROJECT TEN]*

January 2024 Update: The PEB will no longer play a formal role in the delivery of this qualification.

*Implement a programme of stakeholder engagement with a particular focus on employers in order to better inform stakeholders of our activities and to obtain feedback on our performance. [PROJECT ELEVEN]*

January 2024 Update: The PEB GB has approved a plan for stakeholders engagement during 2024, which will focus on the design and delivery of the FD syllabus and examinations.

*Evaluate our online system for the delivery of assessments to ensure that it is optimal. [PROJECT TWELVE]*

January 2024 Update: The PEB GB has decided to postpone any evaluation of the online system of assessments until after the current project on assessment redesign is complete.

*Undertake research on the relationship between examination performance by candidates and the duration of their employment, with the aim of providing information to inform candidate decisions. [PROJECT THIRTEEN]*

January 2024 Update: The PEB GB will formally raise this matter with the CIPA Education Committee as an area on which a collaborative approach would be optimal.

**During the period September 2024 to September 2025, in addition to continuing relevant activities from the previous period, we will aim to:**

*Review the appraisal system for the Chair and members of the Governance Board of the PEB to ensure that opportunities for feedback and professional development are robust. [PROJECT FOURTEEN]*

*Investigate the feasibility of moving to a system of online marking of examinations, the results of which will be fed into the general curriculum review project. [PROJECT FIFTEEN]*

The Governance Board of the PEB will regularly monitor the progress of implementation of this Operational Plan.