

BPIP Roles

This document is intended to provide a draft framework for members, describing different roles and responsibilities within BPIP.

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General Principles

A BPIP member who is in a particular role as a result of volunteering, being nominated or elected, either for a role within BPIP, or as a BPIP representative on another group (e.g. CEPIUG Board), or as a wider patent information group (e.g. SACEPO/PDI) representative, should

- be supported by the Chair or other Officer of that group, or another member (perhaps a current or previous incumbent), in understanding the purpose of the representation role
- be aware of the requirements of that role in terms of time commitment, duration in role, the group structure, confidentiality and GDPR (or equivalent) requirements, etc.
- discuss with relevant contacts any concerns regarding potential conflicts of interest between the individual BPIP member's own employment and their representation of that group
- be able to attend that group's virtual meetings as required, and if unable to attend the meeting, to identify a replacement from BPIP, if permitted, or to send apologies and follow up on any required actions
- be aware that, where a representative is invited to attend that group's meeting, BPIP is unable to fund any travel or accommodation or meeting fees, so these costs will have to be met by the inviting group, the individual themselves, or their employer, or a mix of these, or declined
- be prepared, as appropriate, to gather input from and/or feedback to BPIP on the agendas, decision-making, meeting minutes, etc., subject to the confidentiality requirements of that group
- engage with the BPIP Chair, Vice-Chair and/or Secretary to arrange and distribute questionnaires, surveys, or extraordinary BPIP meetings, as needed, to gather input from and/or feed back to BPIP
- provide a summary report of activities in the role to the annual BPIP meeting and confirm inclusion of the report in BPIP's meeting minutes
- identify to the BPIP Chair, Vice-Chair and/or Secretary when the individual is unable for any reason to continue in the role, including approaching the end of the defined term for that role

BPIP Chair – Role Descriptor

As BPIP Chair, the main aspects of the role are to

- represent BPIP in communications with other patent information professional groups, providers, or other interested individuals seeking to engage with BPIP; this activity may be delegated to other BPIP members, e.g. BPIP Vice-Chair
- on invitation, where no elected BPIP representative exists, represent BPIP at meetings of other patent information professional groups, providers, etc. (this may be subject to any constraints applied to individuals by their own employers or company guidelines, and by their availability); this activity may be delegated to other BPIP members, e.g. BPIP Vice-Chair
- act as a focal point for information exchange for BPIP members and other patent information professional groups
- publicise opportunities which come to the Chair's attention for individuals to volunteer or to be elected to represent BPIP, and work with BPIP Vice-Chair to coordinate any processes of nomination and election as required (e.g. for CEPIUG Board membership, CEPIUG representation at SACEPO/PDI, etc.)
- work as part of the BPIP Meeting planning team (usually made up of BPIP Chair, Vice-Chair, Secretary, Meeting Chair/Host, plus other volunteers) to, for example,
 - agree a timetable of planning meetings, surveys and communications to BPIP members relating to the next BPIP meeting
 - review the survey responses from BPIP members regarding the meeting format, date and location to determine the preferred date
 - develop the agenda for the next annual BPIP meeting
 - make contact with individuals (e.g. presenters or trainers external to BPIP) who are proposed for the annual meeting, to make a formal invitation from BPIP Chair/ planning team
 - complete other pre-meeting planning activities as necessary (subject to availability vs individual work demands)
 - review draft minutes produced after the meeting before dissemination to BPIP members
- work with BPIP Vice-Chair and Secretary to produce and deliver the Chairman's Report and Secretary's Report respectively for the annual BPIP meeting
- establish with the Editor of World Patent Information, currently Jane List, the timetable for submission of a summary of the meeting to the journal for publication; this may be delegated to another member of the BPIP Meeting planning team, e.g. BPIP Vice-Chair
- chair the annual BPIP meeting, unless done by the Vice-Chair or a Meeting Chair
- identify sources of funding for and manage the annual payments due for the BPIP website and URL (<http://www.bpipinfo.com>)
- review communications received at the BPIP email address (bpipinfo@gmail.com) and pass on to BPIP Secretary for dissemination
- review requests for membership or members-only area access received at the BPIP website and grant access via the Wix dashboard as appropriate (note that patent information vendors are not currently granted membership or access)
- pass on details of member changes received (new member requests, role changes, retirements) to BPIP Secretary for the appropriate welcome email and update of the BPIP distribution list
- work with the BPIP Vice-Chair and/or Secretary to clearly identify if communications are for information only, or require action or response; this could include, for example,
 - general patent information news items
 - details of job opportunities flagged by other BPIP members or other patent information professional groups
 - patent information conference dates, calls for submissions, agenda items, speakers, minutes
 - BPIP member news (new members, retirements, role changes)
 - communications from other patent information professional groups, patent information service providers, patent offices, for example, CEPIUG, EPO, PIUG, WIPO, Clarivate, STN/FIZ
 - details of the BPIP annual meeting, including surveys of date and location, calls for submissions, agendas, speakers, minutes, etc.

BPIP Vice-Chair – Role Descriptor

As BPIP Vice-Chair, the main aspects of the role are to

- represent BPIP in communications with other patent information professional groups, providers, or other interested individuals seeking to engage with BPIP; this activity may be delegated from the BPIP Chair
- on invitation, where no elected BPIP representative exists, represent BPIP at meetings of other patent information professional groups, providers, etc. (this may be subject to any constraints applied to individuals by their own employers or company guidelines, and by their availability); this activity may be delegated from the BPIP Chair
- publicise opportunities which come to the Chair's attention for individuals to volunteer or to be elected to represent BPIP, and work with BPIP Vice-Chair to coordinate any processes of nomination and election as required (e.g. for CEPIUG Board membership, CEPIUG representation at SACEPO/PDI, etc.)
- work as part of the BPIP Meeting planning team (usually made up of BPIP Chair, Vice-Chair, Secretary, Meeting Chair/Host, plus other volunteers) to, for example,
 - agree a timetable of planning meetings, surveys and communications to BPIP members relating to the next BPIP meeting
 - review the survey responses from BPIP members regarding the meeting format, date and location to determine the preferred date
 - develop the agenda for the next annual BPIP meeting
 - make contact with individuals (e.g. presenters or trainers external to BPIP) who are proposed for the annual meeting, to make a formal invitation from BPIP Chair/ planning team
 - complete other pre-meeting planning activities as necessary (subject to availability vs individual work demands)
 - review draft minutes produced after the meeting before dissemination to BPIP members
- work with BPIP Chair and Secretary to produce and deliver the Chairman's Report and Secretary's Report respectively for the annual BPIP meeting
- establish with the Editor of World Patent Information, currently Jane List, the timetable for submission of a summary of the meeting to the journal for publication; this may be delegated by the BPIP Chair
- chair the annual BPIP meeting if the BPIP Chair is unavailable, and unless a Meeting Chair is identified

BPIP Meeting Chair – Role Descriptor

As BPIP Meeting Chair, the main aspects of the role are to

- chair the BPIP Meeting planning team (usually made up of BPIP Chair, Vice-Chair, Secretary, Meeting Chair/Host, plus other volunteers) to, for example,
 - agree a timetable of planning meetings, surveys and communications to BPIP members relating to the next BPIP meeting
 - review the survey responses from BPIP members regarding the meeting format, date and location to determine the preferred date
 - develop the agenda for the next annual BPIP meeting
 - complete and/or delegate other pre-meeting planning activities as necessary (subject to availability vs individual work demands)
 - on the day of the meeting, manage the usual meeting activities such as welcoming the attendees, managing the timetable of the agenda, ensuring all member have the opportunity to engage in discussions
 - review draft minutes produced after the meeting before dissemination to BPIP members

This role may be combined with the role of BPIP Meeting Host.

BPIP Meeting Host – Role Descriptor

As BPIP Meeting Host, the main aspects of the role are to

- work as part of the BPIP Meeting planning team (usually made up of BPIP Chair, Vice-Chair, Secretary, Meeting Chair/Host, plus other volunteers) to, for example,
 - agree a timetable of planning meetings, surveys and communications to BPIP members relating to the next BPIP meeting
 - review the survey responses from BPIP members regarding the meeting format, date and location to determine the preferred date
 - develop the agenda for the next annual BPIP meeting
 - complete other pre-meeting planning activities as necessary (subject to availability vs individual work demands)
 - make contact with individuals (e.g. IP colleagues at host location) who are proposed for the annual meeting, to make a formal invitation from BPIP Chair/ planning team
 - provide relevant information to the BPIP Secretary for dissemination to members to assist attendees in locating accommodation, identifying travel options, as well as communicating site access requirements, etc.
 - on the day of the meeting, manage the usual meeting activities such as briefing the attendees on site emergency evacuation requirements, managing the hosting aspects of attendance at a physical meeting, managing the online aspects of attendance for a virtual or hybrid meeting
 - review draft minutes produced after the meeting before dissemination to BPIP members

This role may be combined with the role of BPIP Meeting Chair.

BPIP Secretary – Role Descriptor

As BPIP Secretary, the main aspects of the role are to

- on receipt of items of interest to BPIP members, disseminate in a timely fashion to BPIP members, by direct email, by upload to the BPIPinfo.com members-only webpages, or by other means (BPIPinfo.com blog, LinkedIn group page [Twitter and Facebook accounts exist but are moribund])
- maintain a password-protected spreadsheet of BPIP members details, which is used to generate BCC listing for email comms, analyses of membership numbers and industry breakdown, etc.
- on receipt of new member requests, send the appropriate welcome email and spreadsheet template and update the BPIP distribution list
- on receipt of other news about BPIP members (retirements, role changes), update the BPIP distribution list
- work with BPIP Chair and Vice-Chair to produce and deliver the Chairman's Report and Secretary's Report respectively for the annual BPIP meeting
- work as part of the BPIP Meeting planning team (usually made up of BPIP Chair, Vice-Chair, Secretary, Meeting Chair/Host, plus other volunteers) to, for example,
 - agree a timetable of planning meetings, surveys and communications to BPIP members relating to the next BPIP meeting
 - review the survey responses from BPIP members regarding the meeting format, date and location to determine the preferred date
 - develop the agenda for the next BPIP meeting
 - communicate with all BPIP members at regular periods in the run-up to the BPIP meeting as details are confirmed
 - prepare draft minutes in a timely fashion after the meeting and circulate to BPIP Meeting planning team for review before dissemination to BPIP members
 - gather feedback from members on the BPIP meetings and report back to BPIP on the results

BPIP Meeting Planning Team member – Role Descriptor

As BPIP Meeting Planning Team member, the main aspects of the role are to

- work as part of the BPIP Meeting planning team (usually made up of Chair, Vice-Chair, Secretary, Meeting Chair, Host, plus other volunteers) to develop the agenda for the next annual BPIP meeting
- assist in activities such as
 - reviewing meeting date and location survey responses
 - taking notes at the meeting for inclusion in the minutes
 - reviewing draft minutes produced after the meeting before dissemination to BPIP members