



UPDATE- 11 DECEMBER 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]

STATUS GREEN: New syllabi, assessment methods, and specimen question papers have been produced for all FD examinations. The consultation process has been undertaken and the responses analysed. A further opportunity for stakeholders to provide feedback on the specimen material has been completed and the responses have been considered by the PEB GB. Implementation of the plan will continue during 2025.

Material for the re-accreditation of FC examinations has been submitted to IPReg. The accreditation process is scheduled for early 2025.

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]

STATUS GREEN: Progress against the agreed implementation plan continues. It is monitored and updated on a regular basis. PEB GB has oversight of the plan. The PEB is back on track to meet the IP Reg deadline of March 2025.

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

STATUS GREEN: Actions related to the Mercer Review recommendations have been incorporated into the implementation plan. The PEB is back on track to meet the IP Reg deadline of March 2025.

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]

STATUS GREEN: The new FD4 syllabus, specimen examination paper and marking scheme were included in the FD consultation and opportunity for further feedback. Along with the other FD examinations, this is on track..

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

STATUS AMBER: The website redesign project has been developed following consultation by CIPA with the PEB and the “Informals”. However, the launch of the website has been delayed but is imminent.

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]

STATUS GREEN: The Finance Sub-committee of the PEB GB is now operational. **COMPLETE.**

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

STATUS GREEN: The PEB GB agreed a system for performance review and appraisal. The requirement to undertake performance reviews has been included in the examiner contracts. The PEB has written to all examiners with details for completion following the 2024 examinations.

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]

STATUS GREEN: 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. A new Fair Access to Assessment Policy; and EDI Policy and Statement have been agreed by the PEB GB. Further work on EDI will be considered by the PEB GB as part 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]

STATUS GREEN: 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. The process should be repeated annually and will become business as usual. **COMPLETE.**

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]

STATUS N/A:: The PEB will no longer play a formal role in the delivery of this qualification. **NO LONGER RELEVANT.**

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]

STATUS AMBER: 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. The PEB GB has agreed to organise an Employers Meeting, which will take place early in 2025.

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

STATUS AMBER: The PEB GB has agreed to re-tender for a supplier of the online examination system. This will provide an opportunity to consider the PEB's needs as well as cost efficiency. The tender process will be undertaken in 2025.

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]

STATUS AMBER: The PEB GB has formally raised this matter with the CIPA Education Committee as an area on which a collaborative approach would be optimal. The GB will continue to engage with the Education Committee in order to seek to make progress on providing candidates with useful data on performance.

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]

STATUS GREEN: The PEB has reviewed the already existing PEB GB Governance Board Performance Review Procedure. It has determined that the procedure is fit for purpose and should continue to be applied. **COMPLETE.**

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]

STATUS AMBER: The PEB will consider the feasibility of online marking in the context of the re-tender for online delivery of assessments.

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