

# RESILIENT TOGETHER

STRENGTHENING THE INTELLECTUAL  
PROPERTY COMMUNITY



**STRATEGIC PLAN**  
2021–2023



Intellectual Property  
Institute of Canada

# MESSAGE FROM THE PRESIDENT AND CHAIR OF THE BOARD

We are living in extraordinary and challenging times, and IPIC's 2019-20 Board of Directors is grateful for the opportunity to set the strategic direction for our organization for the next planning horizon.

Over the past three years, IPIC has strengthened its capabilities, demonstrating that we put members' needs first. We are committed to ensuring that our activities remain member-focused and that our organization is resilient and sustainable.

Since the Board of Directors began work on this plan, world events have dramatically changed the way we work and live. The effects of COVID-19 and social movements such as the global anti-racism protests will have a profound impact on our future. Against this backdrop, there is a clear role for IPIC to help members prepare for what's to come.

It's hard to measure the long-term impact of a crisis when you're still living through it. However, there are a few truths that are already evident, which were top of mind for all Board members

as we discussed how IPIC should focus our resources in the coming years. First and foremost, we understand that your budgets are shrinking, but your needs are not.

The IP profession continues to evolve, and members need a strong advocate to raise issues with government stakeholders, champion IP in the business community, and track industry trends. IP professionals need access to timely, high-quality, and affordable education opportunities to launch and advance their careers. Members also need support adjusting to the challenges and uncertainty around us. We can do these things better together than we can alone.

As Canada plans for our economic recovery, IP can and should be a key feature that supports innovation and growth across Canadian industry sectors. IPIC is here to advocate on your behalf and support your practice. As the IP professions grows, we also have an incredible opportunity to ensure we collectively recruit and develop talent that reflects the diversity that is so core to Canada's strength and innovation.

As the only professional organization focused on the Canadian IP profession, IPIC is uniquely placed to support members through our advocacy, education, and member services. We believe this strategic plan gives us direction and flexibility to help us achieve these things together.



**ALAIN LECLERC**

PRESIDENT AND CHAIR OF THE BOARD

A stylized, handwritten signature in black ink, consisting of a large loop and a vertical stroke.

# BOARD OF DIRECTORS



**ALAIN LECLERC**  
PRESIDENT AND CHAIR OF THE BOARD



**STEPHANIE CHONG**  
VICE PRESIDENT



**LOUIS-PIERRE GRAVELLE**  
SECRETARY



**TIM LOWMAN**  
TREASURER



**PATRICK SMITH**  
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**JASON HYNES**  
DIRECTOR



**PAULA CLANCY**  
DIRECTOR



**CURTIS BEHMANN**  
DIRECTOR



**SANA HALWANI**  
DIRECTOR

# MESSAGE FROM THE CHIEF EXECUTIVE OFFICER

One of the most rewarding aspects of leading a professional organization is watching its membership thrive and grow. I am incredibly proud of what our IPIC Board of Directors and members have achieved over the past three years. Guided by our last strategic plan, we rebranded our organization with a modern look that reflects the innovation of our members, we updated our governance systems, and we shifted all IPIC's communications to digital mediums. We celebrated the release of Canada's first National IP Strategy, supported the passing of enabling legislation of the new College of Patent Agents and Trademark Agents, and initiated key partnerships with educational institutions to strengthen the reach of our new educational programming for IP administrators. Our "Own It." IP awareness campaign was a huge success, and our members delivered hundreds of presentations to raise the profile of IP in their communities and with national and provincial business groups. We implemented dozens of recommendations from the membership for new or improved products and services over the last three years, which speaks directly to how much the member volunteers care about continuous improvement of their association.

Staff and the Board of Directors began work on this new strategic plan just before the COVID-19 pandemic

accelerated. As events unfolded, we reflected carefully on what this planning effort should look like. In times of disruption, it can be tempting to postpone planning on the basis that there is too much uncertainty to make decisions. We quickly agreed that this is precisely when planning is most vital. The real value of a strategic plan is that it provides strategic guidance without being prescriptive. Our planning process allowed us to articulate what is important to us in this environment, which helps us set priorities, especially when the world around us is chaotic.

There is no doubt that world events will impact our organization, our members, and their firms. We looked carefully at how IPIC can provide exceptional value to members and how to make the cost of membership worthwhile. We looked at IPIC's core strengths—the things we are best and most uniquely positioned to provide—and how we can offer a compelling value proposition in how we deliver them in a changing environment. I am confident that this strategic plan will help us achieve that, and much, much more.

Our planning will need to be more flexible and nimble than in previous years, but this plan is our North Star, based on what we know today about the issues that matter most to our members. We are committed to reviewing our annual operational plans with additional rigour in this cycle to

ensure, through our activities, that we continue to show members that their investment in IPIC is as worthwhile as it ever was.

On a personal note, I am immensely grateful for the tireless contributions of the many volunteers who contribute to IPIC's success. Although there are challenges ahead, we can work together to become a stronger and more resilient organization with a healthy and prosperous membership. Thank you all for making my job such a pleasure.



**ADAM KINGSLEY**  
CHIEF EXECUTIVE OFFICER





# INTRODUCTION

The Intellectual Property Institute of Canada (IPIC) is proud to be the voice for intellectual property practitioners in Canada. Founded in 1926, IPIC has grown to more than 1,800 members, which include practitioners in law firms and agencies of all sizes, sole practitioners, in-house corporate IP professionals, government personnel, administrators, and academics. As the only professional association dedicated to the Canadian IP profession, IPIC is the national hub for patent agents, trademark agents, lawyers, and practitioners in all areas of IP law.

IPIC members support the Canadian economy by providing expert services to local, national, and international companies that are developing and growing their businesses. Members' clients include virtually all types of Canadian businesses, universities, and other institutions that have an interest in IP in Canada or elsewhere, as well as foreign companies that hold IP rights in Canada.

As the IP industry has evolved in recent years, so has IPIC. Under the leadership of a new executive director starting in 2016, IPIC has strengthened its management processes to ensure that its operations are modern, relevant, and member-focused. This strategic plan builds on those strengths.

Since the last planning cycle, some issues have evolved, and new issues have also emerged. In particular:

- The Government of Canada passed legislation to establish the College of Patent Agents and Trademark Agents and created a College transition board
- The federal government made new investments in a National IP Strategy
- The Madrid Protocol for trademarks and changes to global patent programs, which affect who can act on behalf of IP owners in Canada, is expected to reduce business for firms who serve international clients
- Advances in technology and trends in deregulation are expected to cause a decline in transactional business, which will be displaced by automated services and third-party providers without IP training
- The long-term economic consequences of the COVID-19 pandemic will exacerbate some trends that IPIC was already monitoring

The need to have a National IP Strategy for Canada has long been recognized by IP practitioners. IP is a fundamental element in the growth of innovative companies. The road from idea to

commercial product or service includes the key step of protecting the IP that is inherent to innovation. IPIC members know that IP is a business asset, and that companies that protect their IP see long-term benefits. IP theft and industrial espionage aren't confined to mystery thrillers—they pose an increasing threat to Canadian business and innovation. However, as noted in our last strategic plan, a lower proportion of companies in Canada take steps to protect their IP compared to other advanced economies. While IPIC has made strides in moving the needle on this issue, it's an area that still needs attention—changing attitudes across the breadth of the Canadian business sector is a long-term endeavour.

The timing is right to advance our efforts to raise the profile of IP. COVID-19 has highlighted some enormous opportunities for innovation, and IPIC remains seized with the need to raise the profile of IP among business leaders across industry sectors in Canada as a key pillar of Canada's economic recovery strategy. Likewise, we are eager to support the resiliency and agility of our membership in this changing environment.

This plan is our roadmap, with goals and objectives that are anchored by our vision, mission, and values.



## OUR VISION

IPIC members come from varied backgrounds, and include lawyers, patent agents, trademark agents, administrators, and other subject matter experts. Although several other organizations have an interest in intellectual property issues, many focus on the rights of IP holders or only represent the interests of a subset of IP professionals. IPIC is the only association in Canada that represents all types of Canadian IP professionals.

Our vision is for IPIC to be the leading authority on intellectual property in Canada and the voice of intellectual property professionals.

## OUR MISSION

Highly trained intellectual property professionals contribute to a robust economy by helping organizations understand and leverage the value of intellectual property.

Our mission is to enhance our members' expertise as trusted intellectual property advisors and to shape a policy and business environment that encourages the development, use, and value of intellectual property.

## OUR VALUES

IPIC and its members share a deep commitment to creating a professional community of practice that serves with integrity. All of IPIC's activities are guided by our core values:

Accountability  
Creativity  
Diversity  
Equity

Excellence  
Inclusion  
Leadership

Relationships  
Respect  
Teamwork  
Trust

# STRATEGIC GOAL AREAS

IPIC's strategic plan for 2021–2023 contains four goal areas and objectives.

The goals are:

- Interconnected
- Mutually supporting

The strategic plan also includes enabling activities that will help support IPIC's success.

## • Government Advocacy

- Advise government on how IP-related legislation, regulations, and policies impact businesses in Canada
- Influence government legislation, regulations, and policies that affect the IP profession

## • Business and Public Awareness

- Increase Business Awareness of the Value of IP
- Increase Knowledge and Awareness of the IP Profession

- Integrate Equity, Diversity, and Inclusion Best Practices into IPIC's Governance
- Support Industry Best Practices in Equity, Diversity, and Inclusion

## Equity, Diversity & Inclusion



## IP Policy & Growth



## Education & Skills



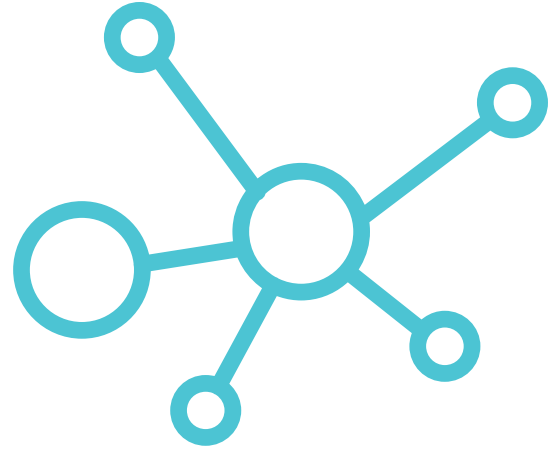
- Educate new professionals
- Deliver relevant and cost-effective professional development for mid- to late-career professionals

## Member Experience



- Explore additional value-added benefits for members
- Increase networking opportunities
- Strengthen French-language programming

## Enabling Activities



## STRATEGIC GOAL AREA

# EQUITY, DIVERSITY & INCLUSION

Research consistently shows that high levels of gender and ethnic diversity are positively correlated with company performance. IPIC therefore believes that promoting equity, diversity and inclusion is a key goal which stands on its own, as well as underlying and informing the other strategic goals. A report by McKinsey notes that, over the past five years, **the likelihood that diverse companies will out-earn their industry peers** has grown. Nonetheless, Black, Indigenous, and People of Colour (BIPOC) are under-represented in the IP community relative to the Canadian population, which has been a concern for industry leaders for several years. IPIC is committed to becoming a leader on equity, diversity, and inclusion (EDI) issues, starting with our own organization. IPIC will also identify concrete steps it can take to help the IP profession and industry embrace EDI best practices.

## Integrate Equity, Diversity and Inclusion Best Practices into IPIC's Governance

IPIC is committed to ensuring that equity, diversity, and inclusion are integrated into our organization's leadership development activities. The process of identifying and encouraging members to seek leadership roles, such as committee chairs, will be reviewed, and concrete EDI targets will be established to inform future decisions.

In parallel with the following objective, IPIC will also seek opportunities to expand the membership and leadership pipeline by promoting inclusion and strengthening recruitment of BIPOC Canadians to the profession through outreach activities to secondary and post-secondary institutions.

## Support Industry Best Practices in Equity, Diversity and Inclusion

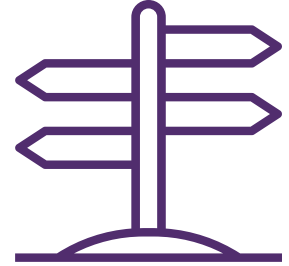
While Canada has a remarkable cadre of IP professionals, the diversity of the profession does not reflect the diversity of Canada's population. Research conducted by IPIC during the last planning cycle also identified a notable gender-based pay gap among Canada's IP professionals. IPIC will explore opportunities to participate in and foster a positive dialogue with the profession by conducting research, offering education, training, and raising awareness on EDI best practices.



"Tennis legend Billie Jean King said it best: 'You have to see it to be it.' We can start by looking at ourselves and recognizing our blind spots."

*IPIC Strategic  
Planning Session*





## STRATEGIC GOAL AREA

# IP POLICY & GROWTH

IPIC members seek to grow the IP industry for the benefit of all Canadians. As a member-driven organization, IPIC's policy activities are guided by this overarching ambition. We advance this goal through our ongoing advocacy work in the government and business sectors.

## Government Advocacy

As the voice of IP professionals across Canada, IPIC plays a vital role in raising awareness among elected officials and senior public servants about the value of IP to Canadian businesses and the Canadian economy, as well as the impact of government decisions on the IP profession. Engaging with government to promote, develop, and implement modern IP policies continues to be at the heart of our work. IPIC will continue to amplify the expertise of IP professionals to influence government policy.

### Advise government on how IP-related legislation, regulations, and policies impact businesses in Canada

While the Government of Canada has taken important steps to grow IP in Canada, Canadian businesses need additional tools and support to help them take full advantage of how IP can support innovation. As the federal government continues to implement the National IP Strategy, IPIC will deepen the scope of its engagement with government officials to shape the direction of the strategy and to position IPIC as the leading authority on IP issues in Canada. IPIC will also continue engaging with federal and provincial officials to advocate for incentives that support IP growth across business sectors.

### Influence government legislation, regulations, and policies that affect the IP profession

The work of IP professionals encompasses all aspects of Canadian business, as well as being a vibrant industry in its own right. Many government initiatives and processes have a direct impact on IP practice, including international treaties and trade agreements, as well as regulatory oversight of the IP profession. IPIC will continue to advocate for improvements to the IP system that will create the conditions for IP growth. IPIC will also collaborate with the new College of Patent Agents and Trademark Agents on its journey of elevating the credibility the IP profession.

"In a noisy policy environment full of competing interests, the need for our advocacy work will never disappear. In fact, the need is growing."

*IPIC Strategic Planning Session*



## Business and Public Awareness

Innovation and IP are inextricably linked, and countries that are global innovation leaders have robust IP systems. However, research continues to show that Canadians are less aware of IP than their U.S. counterparts. A report by the Centre for International Governance Innovation noted that, in 2017, the World Intellectual Property Organization (WIPO) report ranked Canada twentieth for patents, sixteenth for trademarks, and forty-third for designs, and there were no Canadian companies in the top 100 patent applicants worldwide. The federal government's **IP Canada 2019 Report** noted that while long-term trends show growth in Canadian trademark rights, patent and industry design rights remain relatively stagnant. Supporting the increased use of the IP system will benefit the economy, particularly as Canada plans its COVID-19 recovery strategy.

"People are talking about IP more than ever before. That needs to continue, and we need to turn that talk into action."

*IPIC Strategic  
Planning Session*

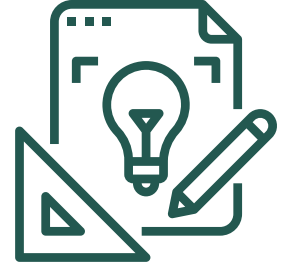
### Increase Business Awareness of the Value of IP

The changing economic environment presents an opportunity to reinforce the value of IP across key sectors of Canadian industry. Even in difficult economic times, many new businesses will emerge and others will pivot, creating a unique opportunity to promote a broader conversation about protecting IP. As government stimulus programs are created, IPIC will advocate for putting IP at the centre of business recovery strategies by underscoring how IP can make growth happen faster and support the long-term sustainability of Canadian businesses.

### Increase Knowledge and Awareness of the IP Profession

As organizations become more knowledgeable about IP, there is a related need to improve awareness about the IP profession and the value of hiring a qualified expert to handle IP issues. This is especially the case as more unregulated third-party service providers advertise their services and international treaties allow for out-of-country filings. IPIC will seek opportunities to demonstrate how hiring an IP professional can save valuable time and resources and improve success rates, as well as identify the risks associated with hiring someone who is not an authorized agent.





## STRATEGIC GOAL AREA

# EDUCATION & SKILLS

Education is a key raison d'être for IPIC, and we remain deeply committed to fostering high levels of knowledge, training, and ethics among Canadian IP practitioners. IPIC is proud to be recognized for the value of its educational offerings. We will continue to ensure that IP professionals have the skills they need to succeed throughout their careers and to ensure that IPIC is seen as the leading provider of accessible, high-quality, cost effective education.

"In a crowded market, it's important that IPIC's educational programming stand out as the highest quality, most relevant, and most cost-effective option to meet members' needs."

*IPIC Strategic  
Planning Session*

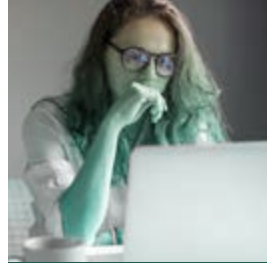
### Educate new professionals

Our courses to help emerging IP professionals prepare for the rigorous qualification exams to become a patent or trademark agent are a mainstay of IPIC's educational offerings. During the last planning cycle, IPIC also introduced training for IP administrators who provide vital support to other IP professionals. IPIC will maintain and enhance these offerings to ensure that new IP professionals in Canada begin their careers with a solid foundation and that they see value in becoming part of the IPIC community.

### Deliver relevant and cost-effective professional development for mid- to late-career professionals

IPIC now offers upwards of 70 webinars each year and is accredited by many law societies as a continuing education provider. As part of an innovative and creative profession, IPIC members have identified a need for training that supports their career and business development continuously throughout their career, and also so they can stay current on a broad range of topics in the ever-changing IP environment.

In the wake of the COVID-19 pandemic, IPIC reacted quickly to members' need for guidance on transitioning to remote work. These offerings were very well-received and highlighted the need among practitioners for education offerings that extend beyond IP-related topics. IPIC is committed to enhancing our continuing professional development program to include offerings that are relevant and cost-effective for all members, with a pricing model that makes IPIC membership a must-have.



## STRATEGIC GOAL AREA

# MEMBER EXPERIENCE

IPIC knows that the economic challenges ahead mean that many members will be carefully evaluating their budgets and that the cost of association memberships will be carefully weighed against other pressures.

Many IPIC members also belong to other national and provincial associations, and the arrival of the College has expanded the ecosystem of organizations that come at a cost to members. The Board of Directors is committed to demonstrating that IPIC is a worthy investment in professional growth that elevates the profession as a whole by creating a more powerful collective voice.

IPIC also remains committed to being a bilingual organization and looks forward to expanding its French-language programming for members.

### Explore additional value-added benefits for members

IPIC members currently benefit from preferred pricing on educational programming. We intend to refine the pricing model and explore new partnerships with external service providers to secure discounted rates for IPIC members to ensure that members receive an exceptional return on their membership investment.

IPIC will also consult with members to better understand what data, information, and resources they and their firms need to support professional and business excellence. Building on the success of initiatives like the member compensation survey, IPIC will explore cost-effective opportunities to commission research to position IPIC as a valuable knowledge hub for members and their firms on relevant topics. This would also support IPIC's advocacy work.

### Increase networking opportunities

Creating and maintaining strong professional connections is one of the member benefits the IPIC community values most. Well-crafted networking opportunities add richness to our professional practices while also providing business development opportunities. IPIC will explore innovative ways for members to grow their network of colleagues and potential clients.

### Strengthen French-language programming

IPIC is proud to be a bilingual organization. To better support members, IPIC will continue to look for opportunities to strengthen its French-language services, communications, and educational offerings.

"More than ever, our members need to see enormous value in belonging to IPIC. Many organizations are competing for their dollars, and it's up to us to show why we deserve them."

*IPIC Strategic Planning Session*



# ENABLING ACTIVITIES

Enabling activities are part of the day-to-day functions that allow IPIC to serve its members with excellence. From management and financial controls to member communications, IPIC will build on its operational excellence to strengthen our own resiliency and support progress in our strategic goal areas.

Organizational resilience relies on having open and regular communication with IPIC members. IPIC will continue to build its digital presence, with a focus on enhancing two-way communications to stay attuned to members' evolving needs.

IPIC's advocacy and member experience goals also rely on having the right information to help us and our members make good decisions. IPIC will identify and prioritize cost-effective opportunities to collect data or commission research that will accelerate progress towards our strategic goals and position IPIC as the leading authority on IP in Canada.



The background features a complex network of glowing white and light blue lines that form a series of overlapping, flowing shapes. Interspersed throughout are various hexagonal patterns, some solid and some outlined, in shades of purple, blue, and green. The overall aesthetic is futuristic and digital, with a color palette transitioning from dark blue at the top to a lighter teal at the bottom.

# CONCLUSION

This strategic plan provides a foundation for IPIC to support our own sustainability, anchored by our commitment to our membership. We are eager to play our part in helping our members build resiliency and agility as they navigate this change and uncertainty.

