



IPIC Strategic Plan Progress Update

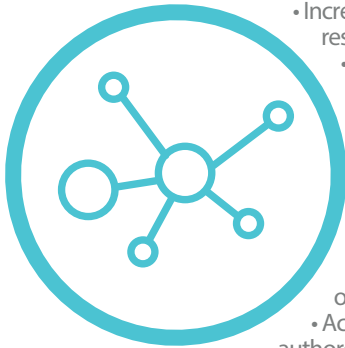
Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4

2021 2022 2023

- ISED Agent-Client Privilege Consultation Results in Planned Options Paper
- Copyright Committee appears before Parliament on right to repair and interoperability Bills

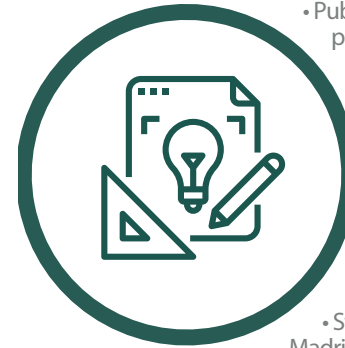
- 754 professionals attended the Year-in-Review in Patent Law, Trademark Law and Copyright Law webinars
- Welcomed 147 new IPIC members surpassing Q1 2022 recruitment by 89%

Equity, Diversity & Inclusion



- Increased awareness and access to EDI initiatives and resources of members and IP firms through weekly IP Newsbreak.
- Celebrated Black History Month with four compelling Member Spotlights.
 - Hosted 'Gender Bias in AI: The Pitfalls and the Promise' webinar on International Women's Day as well as a Spotlight series with four incredible Q&A's from women leaders in IPIC's membership.
 - Presented to students in partnership with JA Canada and Pathways to Education on IP Basics, Careers in IP.
 - Accepted invitation from Northern College to discuss partnership opportunities for IP education for Indigenous Students.
 - Acknowledged Neurodiversity Celebration Week with member authored article on UnscriPted Blog.
- Released overview of results from IPIC's first EDI Survey.

Education & Skills



- Published the IPIC/McGill Summer IP Courses for 2023 program in patents, trademarks and copyright with sponsorship opportunities for networking events.
- Delivered continuing professional development to CCTAs on the administration of Canadian designations of international registration.
 - Launched the 2023 edition of the Patent Agent Training Course (Infringement/Validity Module).
 - Released the Trademark Agent Exam Prep Course in preparation for the Fall 2023 qualifying exam.
 - Offered the yearly Trademark Case Law Review Series (8 webinars) attended by over 1,000 viewers.
- Started drafting content for a new on demand module on the Madrid Protocol.

IP Policy & Growth



- IPIC Past President Louis-Pierre Gravelle appears before Standing Committee on Science and Research as witness to committee's study 'Support for the Commercialization of Intellectual Property.'
 - Discussions with Minister Champagne's office result in ISED consultation on Agent-Client privilege.
 - IPIC met with MPs and Senators on the INDU, FINA, and Senate BANC committees.
 - CPATA agrees to accept complaints against unauthorized practice, needs time to develop enforcement processes.
 - 181 IPIC members have signed up for IP Assist program to date.
 - 41 IPIC members have begun working on L2 Strategy Development for the IP Assist program.
- IPIC and McGill partner on development of IP Strategy online course for business.

Member Experience



- Released call for nominations for IPIC Member Awards: Member of Distinction, Outstanding Contribution Award, and Roger T. Hughes Future Leader Award.
 - Members participated in speaking engagements offered through the IP Insights panel series delivered by the IP Village; a collaborative initiative of IP partners and stakeholders.
 - IPIC leadership delivered presentation to Toronto Intellectual Property Group (TIPG) on IPIC's strategic initiatives for 2023.
 - Ran the IPIC Sole and Small Practice Community Succession Planning Survey for members of the IP profession who participated in the sale or purchase of an IP practice.
 - Launched the 15th Annual Canadian IP Writing Challenge in partnership with IP Osgoode.

OUR VISION: To be the leading authority on intellectual property in Canada, and the voice of intellectual property professionals.

OUR MISSION: 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.

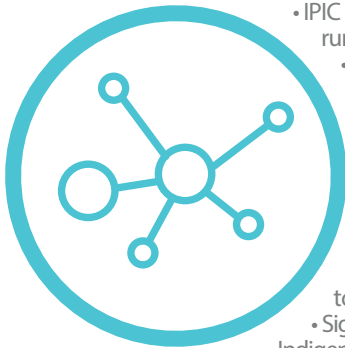
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- IPIC releases complimentary EDI e-learning modules exclusively to members
- Launch of new **Own It.** campaign video featuring Makatew Workshops

- IPIC acted swiftly to represent members views on CPATA's New Bylaws and Fees
- **IPIC2023** program introducing new half-day workshops was released

Equity, Diversity & Inclusion



- IPIC celebrates Pride Season with Proud to Share campaign; running until end of August.
- IPIC hosts *Women and IP: Accelerating Innovation and Ingenuity* in recognition of World IP Day 2023.
- IPIC attends Pathway to Education Career Fair in Spryfield, NS and Soaring Indigenous Youth Empowerment Gathering in Edmonton, AB engaging with over 1,000 students discussing careers in IP as well as IP awareness for entrepreneurs.
- IPIC continues conversations and builds on relationship with CCAB, ISED and CIPO in efforts to increase IP awareness to Indigenous communities and businesses.
- Signs a partnership agreement with Indspire – a national Indigenous charity that invests in the education of First Nations, Inuit and Métis people.

Education & Skills



- **IPIC2023** website and registration were launched in early June.
- The Conference program including new workshops was released.
- 16 Conference sponsors have been secured to date.
- 4 webinars in connection with EDI education were well attended.
- IPIC granted the designation CCPA to 8 exam candidates.
- IPIC granted the designation CCTA to 14 exam candidates.
- A webinar was held jointly with CPATA on new agent competencies.
- The 2023-24 IPIC Mentorship Program was launched.

IP Policy & Growth



- CPATA released new bylaws and fees prompting IPIC action on behalf of membership.
- IPIC created member surveys, developed a position paper, and had meetings with CPATA and ISED on the members concerns.
- President's Tour consisted of stops in six Canadian cities to discuss strategy with IPIC members.
- Met with Director General of Trademarks Branch on Trademark Backlog Reduction Strategy.
- IPIC continued support for INTA on Bill 96 in Quebec seeking meetings with two Ministers and the OQLF.
- Copyright Committee provided feedback to Parliament on right to repair Bills.

Member Experience



- Launch of IPIC's latest **Own It** video featuring Makatew Workshops branding story.
- Held town hall meetings during President's Tour to discuss IPIC's 2024-26 Strategic Plan.
- PR Campaigns launched for National Indigenous History Month, Pride Month, and National Indigenous Peoples' Day.
- IP Assist program continues to offer members business development. 92 L1's and 26 L2 matches were made with IPIC members in Q2.
- IPIC continues to develop programming for **IPIC2023**, registrations launched.
- IPIC announced shift in AGM to virtual format with *GetQuorum* software in 2023.

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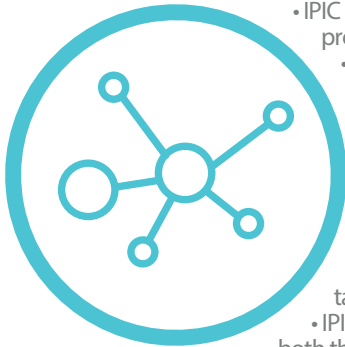
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- IPIC paired 75 agents with Canadian small businesses for IP strategies as part of the IP Assist program in Q3
- Trademark Office completes hiring blitz of 100 examiners to help with backlog

- IPIC is preparing the launch of a new webinar series on IP strategy for the IP practitioner.
- IPIC announces new Compensation Survey coming fall 2023

Equity, Diversity & Inclusion



- IPIC revised language in Bylaws, Conference, and Committee processes to focus on EDI.
- IPIC retained Abacus Data for the Compensation Survey to gather data on member profile compensation.
- IPIC engaged the EDI consulting firm, Global Learning, to assist in the creation of EDI Guiding Principles.
- We've established a new IPIC EDI Advisory Committee.
- IPIC participated in the RXN Hub event at Queen's University, featuring member presentations to over 100 students and entrepreneurs.
- IPIC is preparing to launch the Careers in IP campaign, targeting students across Canada.
- IPIC's PTIEF committee continues its efforts to solicit donations for both the Peter McBurney and Gordon Henderson Funds.

Education & Skills



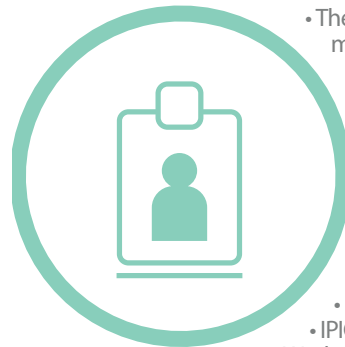
- IPIC is preparing the launch of a new webinar series on IP strategy for the IP practitioner.
- Nineteen sponsors attended our October Annual Conference.
- The IPIC-McGill courses in patents, trademarks and copyright were successfully held in Montreal.
- IPIC offered a webinar on buying & selling an IP practice as part of its practice management series.
- The Emerging Leaders Committee presented a webinar on strategies to communicate with inventors.
- The IPIC Mentorship Program continues to grow with 30 new mentees and mentors.
- The Patent Agent Exam and Trademark Agent Exam Tutorials were very well received.
- The Patent Agent Training Course – Drafting & Prosecution Module was well attended.

IP Policy & Growth



- IPIC and CIPO agreed to involve agents in new examiner training/orientation.
- Several discussions with Office of Minister of ISI on CPATA bylaws and fees.
- Board developed an action plan to represent members views on CPATA bylaws and fees.
- IPIC-McGill agreed on terms to develop IP Strategy for Business education program.
- Professional regulation committee reviewed and developed recommendations on CPATA bylaws.
- Internet and Technology Committee requested appearance before INDU on Bill C27.
- TM Branch adopted IPIC recommendation to allow new examiners from outside of Ottawa-Gatineau Region.
- The draft "Right to Repair" Bill amended to deal with some of IPIC's recommendations.

Member Experience



- The IPIC-IRAP IP Assist Partnership resulted in 53 L1 matches, and 22 L2 strategies in Q3.
- FORPIQ and LES collaborated on the development of a new French language webinar, and the CPD committee began development of two more.
- IPIC began work on a catalogue of IPIC archived webinars for members.
- IPIC introduced our new patent and trademark administrator communities.
- IPIC shared educational resources for National Day for Truth and Reconciliation with membership and public.
- Our September AGM saw the successful launch of *GetQuorum*.
- IPIC completed programming for **IPIC2023** Winnipeg.
- Work continues on launching our Careers in IP website.

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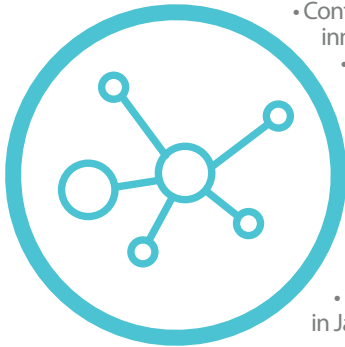
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- IPIC receives the 2023 CSAE Centre of Excellence Award for Excellence in EDI
- Opposition Industry Critic, MP Perkins, agrees to introduce a private members bill on agent-client privilege

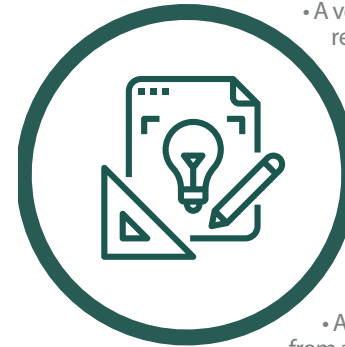
- IPIC's new webinar series "IP Strategy: Being an Effective IP Strategist" was attended by 200+ IP practitioners
- IPIC members completed over 45 L1 engagements with small businesses for IP assist program

Equity, Diversity & Inclusion



- Continued conversations with northern education and innovation institutions about Careers in IP.
- Over 200 IPIC members have completed the EDI e-Learning modules.
- Three indigenous STEM students matched for the IPIC Foundation bursary. More details to follow.
- The Patent & Trademark Institute Educational Foundation received \$12,500 in donations this quarter.
- IPIC recognized as a finalist for Charity Village's "Best Nonprofit Employer for Diversity, Equity, and Inclusion" award.
- New EDI Pulse survey has been finalized and will be released in January.

Education & Skills



- A very successful **IPIC2023** welcomed 200+ in-person and remote delegates and 19 sponsors.
- 2 skills-based workshops and 1 additional day of IP roundtables were offered at the Conference.
- The Administrator Certification Exams were held successfully, with 13 new CCTAs and 11 new CCPAs.
- The TM Admin courses were updated following CIPO's new practice notices on Opposition.
- A 5th module of the Trademark Agent Training On Demand series on Madrid was launched.
- A successful 4-part webinar series on IP Strategy was attended by hundreds of IP practitioners.
- A webinar on soft skills held in December received great reviews from attendees.

IP Policy & Growth



- ISED sends draft options analysis to Minister of ISI on clarifying privilege legislation.
- IPIC makes submission on CIPO's TM examination service standards proposal.
- CPATA confirms work has begun on investigating UAP complaints.
- IPIC met with 10+ stakeholders in preparation for 2024 collaborative events.
- MP Rick Perkins agrees to introduce a PMB to amend privilege legislation.
- IPIC Professional Regulation Committee begins development of brief on improving governance model for professional regulation.

Member Experience



- FORPIQ, LES and IPIC cross promoted new webinars in French.
- IPIC members completed over 45 L1 engagements in this quarter for IP Assist program
- CIPR 37 content sent to publisher, new issue set to release shortly.
- Compensation Survey closed in November, obtaining over 300 responses from the profession.
- **IPIC2023** Annual Conference in Winnipeg emerged as a major success with members.
- Virtual AGM 2023 saw the successful launch of *GetQuorum*.

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