

Strategic Plan Success Report 2021-2023

The voice of intellectual
property professionals



Intellectual Property
Institute of Canada

IPIIC at a glance



Our Team



ADAM KINGSLEY
Chief Executive Officer



ANNE-JOSÉE DELCORDE
Director of Education



LORETO LAMB
Director of EDI and
Stakeholder Relations



JESSE AUGUSTE
Director of Communications
and Member Services



KIM ARIAL
Manager of Education & Events



ASHA LABRECQUE
Member Services Officer



JACILYN STETTNER
Education Officer



ROBYN O'NEILL
Design Officer



NATHALIE ETIENNE
Program Officer



CHARU BHARGAVA
Accountant

IPIC's 2021-2023 Leadership

Over the last three years, IPIC has made significant strides in implementing and executing its 2021-2023 Strategic Plan, thanks to the outstanding leadership of IPIC's three most recent Presidents, Tim Lowman, Louis-Pierre Gravelle, and Stephanie Chong. Explore our 2021 and 2022 annual reports, and our 2021-2023 year in review videos below for a detailed overview of our major achievements and successes throughout the past three years.



Stephanie Chong



Louis-Pierre Gravelle



Tim Lowman



Board of Directors

IPIC members vote in a new IPIC Board of Directors every fall. The IPIC Board is composed of nine members: four officers, the immediate past president, and four directors. To account for the diversity of roles existing in the profession, the Board comprises IP lawyers, patent agents, trademark agents, litigators, and corporate practitioners.

IPIC expresses gratitude to all Past Presidents and former Board Members for their invaluable contributions to IPIC and the Board over the past 3 years.



Jonathan Auerbach



Jennifer Dove



Jason Markwell



Curtis Behmann



Sana Halwani



Heather Mueller



Paula Clancy



Alain Leclerc



Béatrice Ngatcha



Elizabeth Dipchand



Nathaniel Lipkus



Jordana Sanft

Strategic Plan

The year 2023 marked the conclusion of IPIC's 2021-2023 strategic plan, which encompassed four goal areas and objectives. Three of these goals constitute the association's foundational pillars, while the fourth, Equity, Diversity, and Inclusion, stands independently and informs other strategic objectives.

The goals are:

- **Interconnected**
- **Mutually supporting**

Equity, Diversity & Inclusion

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

IP Policy & Growth

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:

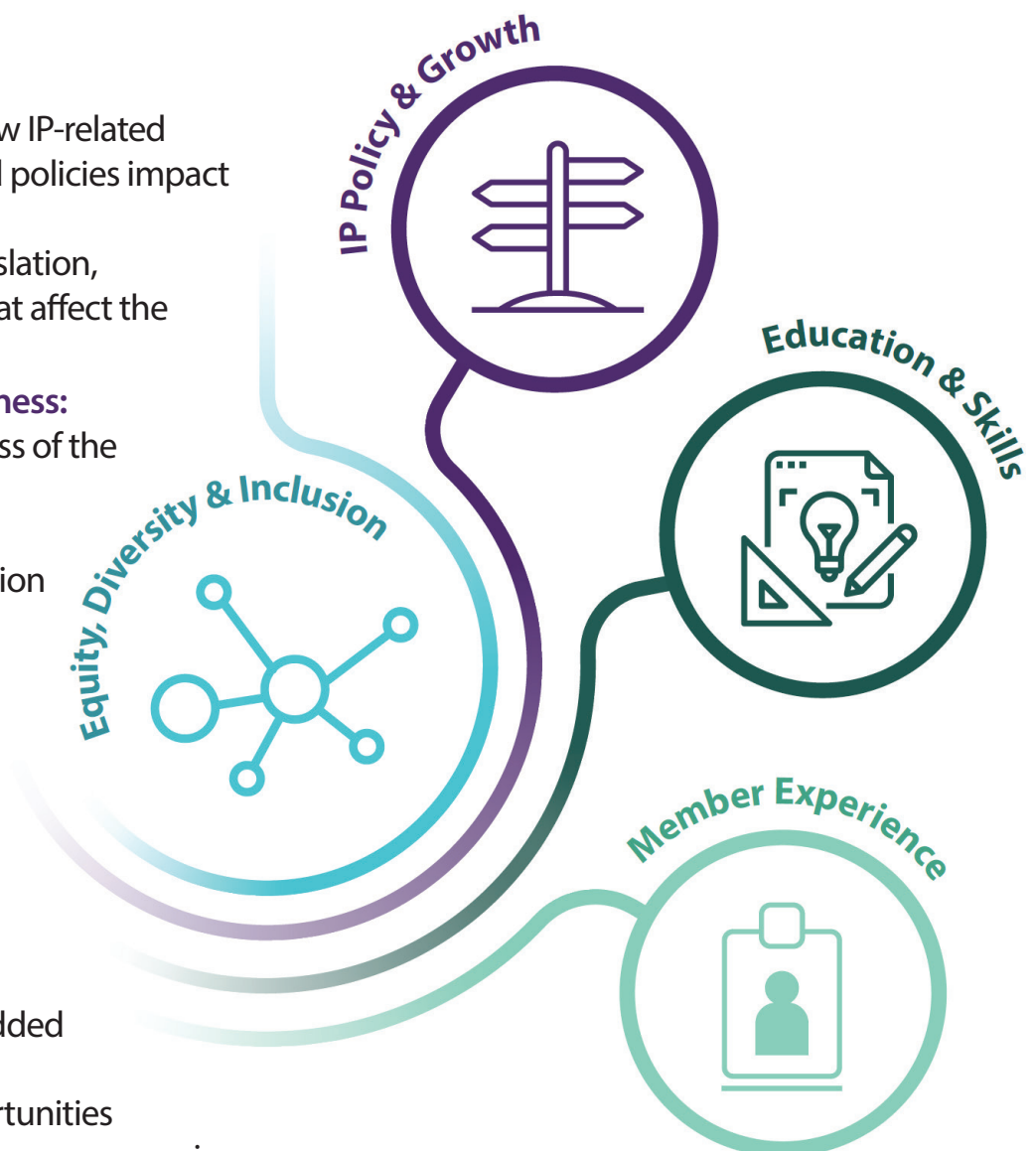
- Increase Business Awareness of the Value of IP
- Increase Knowledge and Awareness of the IP Profession

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



Equity, Diversity & Inclusion

EDI Funding

In 2021, IPIC wrote a successful grant application to Women and Gender Equality Canada, resulting in a grant of over \$500,000 to be used towards IPIC's EDI education, outreach, and research projects (the project was launched as *Building Back Through Innovation & Increasing Diversity in Canada's IP Sector*). With this generous infusion of funds, IPIC embarked on a multifaceted journey to advance EDI within the intellectual property sector while creating networks, partnerships, and dialogue to amplify the voices of underrepresented groups within the profession.



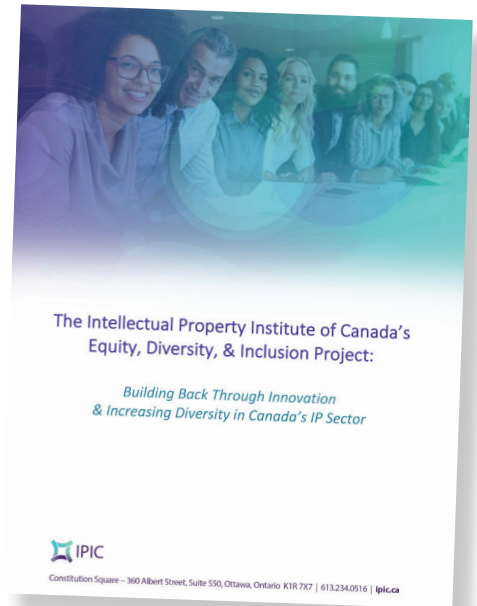
Women and Gender
Equality Canada

Femmes et Égalité
des genres Canada

MORE
THAN
4



IPIC members presented on **IP awareness** and **Careers in IP** at various stakeholder and partner events throughout Canada



EDI Survey

IPIC launched the Diversity, Demographic & Inclusion Survey held in 2022, the first of its kind in IPIC's history. The survey revealed that Canadian IP professionals were interested in training on Equity, Diversity, and Inclusion subjects such as Overcoming Bias. In response, IPIC has engaged the third-party service provider responsible for the survey, Global Learning Inc., to offer three eLearning Modules on key EDI topics of interest. The eLearning modules offer 1 hour of CPD in EDI.

modules are
3 x 20-minute
sessions
= 1 CPD credit

IPIC's **COMPLIMENTARY**
Equity, Diversity & Inclusion
e-learning modules

– Exclusive to IPIC members –

- Fundamentals of DEI
- Overcoming Bias
- Inclusive Communication

EDI

ETHICS

Indigenous Activities

The Patent & Trademark Institute Educational Foundation (PTIEF) invested \$25,000 in the IP education of First Nations, Inuit and Métis people. IPIC also partnered with Indspire, an Indigenous national charity that invests in the education of First Nations, Inuit and Métis people for the long-term benefit of these individuals, their families and communities, and Canada.

Recognition

In 2023, IPIC received the Excellence in EDI Award from CSAE Association Centre of Excellence Awards. This award recognized IPIC's efforts to fostering an inclusive professional community where diversity is embraced and celebrated. The award acknowledges that, in addition to our core mission, IPIC has demonstrated an extraordinary commitment to building bridges across differences and creating an IP community where individuals feel heard, respected, and represented.



Other Achievements

- IPIC EDI Committee is formed with Chair and Vice-Chair
- IPIC recognized as a finalist for Charity Village's "Best Nonprofit Employer for Diversity, Equity, and Inclusion" award
- Released overview of results from IPIC's EDI Survey conducted in 2022

IP Policy & Growth

CPATA Launch

In 2021, IPIC successfully laid the groundwork for the College of Patent Agents and Trademark Agents (CPATA) through our work with the transition Board and CEO to launch CPATA and establish the initial policies and procedures needed to open their doors. This collaborative milestone is the culmination of a 20-year effort encompassing a spectrum of activities, ranging from strategic planning sessions to detailed consultations, ensuring that CPATA was equipped with a robust framework that aligns with the highest standards of professional practice.

IP Assist

In 2022, IPIC demonstrated its commitment to fostering innovation and supporting the business landscape by forging a robust partnership with the National Research Council Industrial Research

Assistance Program (NRC IRAP). This strategic alliance not only marked a significant milestone for IPIC but also solidified its role as the preeminent national partner for the delivery of Intellectual Property (IP) strategy through the groundbreaking IP Assist program. This collaboration achieved notable success by seamlessly connecting over 300 unrepresented SMEs with seasoned IP professionals across Canada.



Agent-Client Privilege

In June 2016, agent-client privilege was granted through amendments to the Patent Act and Trademarks Act. This changed on November 2021 with the Janssen v. Sandoz Decision, where the federal court of Canada provided a narrower interpretation of privilege. This marked a 5-year period where patent and trademark agents and their clients worked under the assumption of the full scope of privilege over confidential communications. In April 2022, the IPIC submitted a brief to the Minister of Innovation, Science and Economic Development (ISED), presenting IPIC's proposed solutions: calling for legislative amendments and/or a Notice from the Minister regarding intent. After several meetings, the Minister requested ISED run a consultation with affected stakeholders, as well as a report on available options. In November 2023, ISED provided the Minister with an analysis of options. IPIC also made some inroads with Conservative Industry Critic, MP Rick Perkins, who voice interest in both a private members bill and a campaign platform promise to correct the wording of the IP statutes.

IPIC engaged in

CONVERSATIONS AND **PARTNERSHIPS**

with close to **eighty stakeholders** and

PRESENTED OVER 30 TIMES

to existing and new partners since 2021



Membership Advocacy

Following CPATA's evolving by-laws in 2023, IPIC's Board formulated an action plan to champion member perspectives. Efforts began with IPIC surveying our membership base to understand the nuanced perspectives, concerns, and preferences of members regarding CPATA's proposed changes. Building off the insights gleaned from the survey, IPIC created a comprehensive position paper, advocating for transparency. IPIC led an advocacy campaign, organizing strategic meetings with both CPATA and the Innovation, Science, and Economic Development Canada (ISED). IPIC's multifaceted effort aimed at ensuring that the voices of its members were not only heard but also instrumental in shaping CPATA policies into the future.

- over -
150
government
meetings
took place over the
course of the plan



TM Backlog

The Trademark Backlog refers to the significant number of pending trademark applications awaiting examination by the Canadian Intellectual Property Office (CIPO). In response to this challenge, IPIC and the Trademark Office committed to a substantial expansion of CIPO's workforce by hiring 100 new examiners. This also led to the agreement to involve agents in new examiner training and orientation.



Other Achievements

- IPIC successfully intervened in *Benjamin Moore & Co. v. Canada (Attorney General)*, 2022 FC 923 which resulted in the Federal Court directing CIPO to apply IPIC's proposed test for the subject-matter patentability of computer-implemented inventions. (Appealed by the AG in Spring 2023, and IPIC now seeking leave before the SCC in Fall 2023)
- Crafted 18+ government briefs on diverse topics, including a Modern Copyright Framework for Artificial Intelligence.
- Supported Federal Court's IP Users Group, with three representatives, and granted interventions in high-profile cases impacting IP policy and the profession.

Educations & Skills

New TM On Demand Courses

IPIC launched two new modules of the Trademark Agent Online Training Course series on Preparing Evidence in Trademark Office Proceedings and Madrid Protocol, the international system for registering trademarks. These courses are structured as self-paced educational programming offering study materials, relevant case law, self-assessment quizzes (Q&A), as well as substantive assignments accompanied by model answers. Over the past three years, IPIC has had 95+ registrations for these on demand courses with positive feedback received.



"For Canadian trademark practitioners and IP administrators, navigating the intricacies of the Madrid international system of trademark registration can be challenging. IPIC's newest on-demand course offering, *Madrid Protocol*, brings together important information about the Madrid system in one convenient module, including a general overview of the international registration system, practical tips for preparing and filing applications for international registration, and highlights of key differences in the treatment of Protocol applications in Canada. If you are looking to gain a better understanding of the Madrid system generally or looking for practical tips for filing and prosecuting international applications, this self-paced, self-directed course is for you."



CHRISTOPHER DEJARDIN (Cassan Maclean IP Agency Inc.)
Chair, Trademark Agent Training Committee

Certified Administrators

In total, over 100 candidates successfully passed the Trademark Administrator Exam and/or the Patent Administrator Exam. In 2022, IPIC introduced a lower priced membership category for Certified Administrators, which is a non-voting member category offered to both those who are A) currently in the process of completing one of IPIC's Certification Programs to become either a Certified Canadian Trademark Administrator or a Certified Canadian Patent Administrator, or B) those who have completed one of IPIC's Certification Programs and received their certification as a Canadian Trademark Administrator or a Canadian Patent Administrator and are currently maintaining their certification.

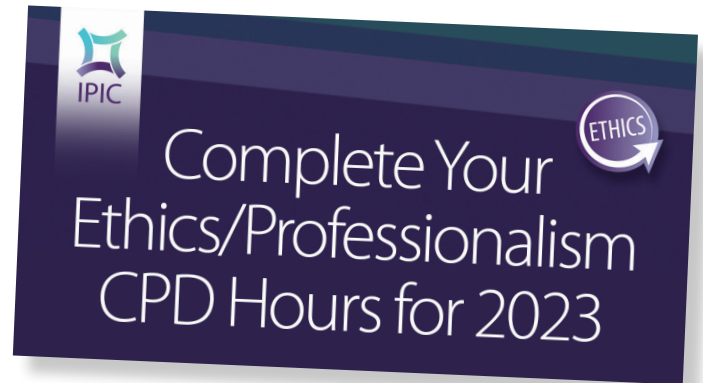


Over 100 
candidates successfully passed the
TRADEMARK ADMINISTRATOR EXAM
and/or the
PATENT ADMINISTRATOR EXAM



CPD, Professional Development and Training

IPIC dedicated efforts to provide comprehensive professional development, offering continuing education to over 15,000 mid-to-late career participants. Noteworthy additions included the release of the trademark modules Evidence in Trademark Office Proceedings and Madrid Protocol and interactive workshops on mentoring and transitioning to virtual practice.



New IP Strategy Series

IPIC's education team introduced a webinar series on IP Strategy: Being an Effective IP Strategist. This was a collaboration with 16 IPIC members serving as educators over 4 weeks, teaching IP professionals how to enhance their skills to support advising clients on IP strategy, building a strong portfolio and unlocking the value of IP. The 4 week series facilitated a dynamic exchange of ideas, fostering rich learning where participants could engage with real-world scenarios and practical case studies.

| IP Strategy Series: Being An Effective IP Strategist | | | |
|---|---|--|---|
| <u>NOV. 7, 2023</u> Audit and Assessment of the Client's IP | <u>NOV. 14, 2023</u> Developing and Implementing a Balanced IP Strategy | <u>NOV. 21, 2023</u> Valuing, Leveraging, and Financing IP | <u>NOV. 28, 2023</u> Monitoring and Measuring the Success of an IP Strategy |
| All webinars 1:00 – 2:30 pm (ET) | | | |

Other Achievements

- Over the last three years, welcomed over 600+ attendees in-person and virtually to IPIC's annual conferences
- Developed two workshops on Cross-examination and Drafting Licenses presented at the 2023 Annual Conference
- Following the COVID-19 Pandemic, pivoted to a successful hybrid Annual Conference in Whistler, BC.
- Introduced French-language programming in partnership with FORPIQ and LES Québec.

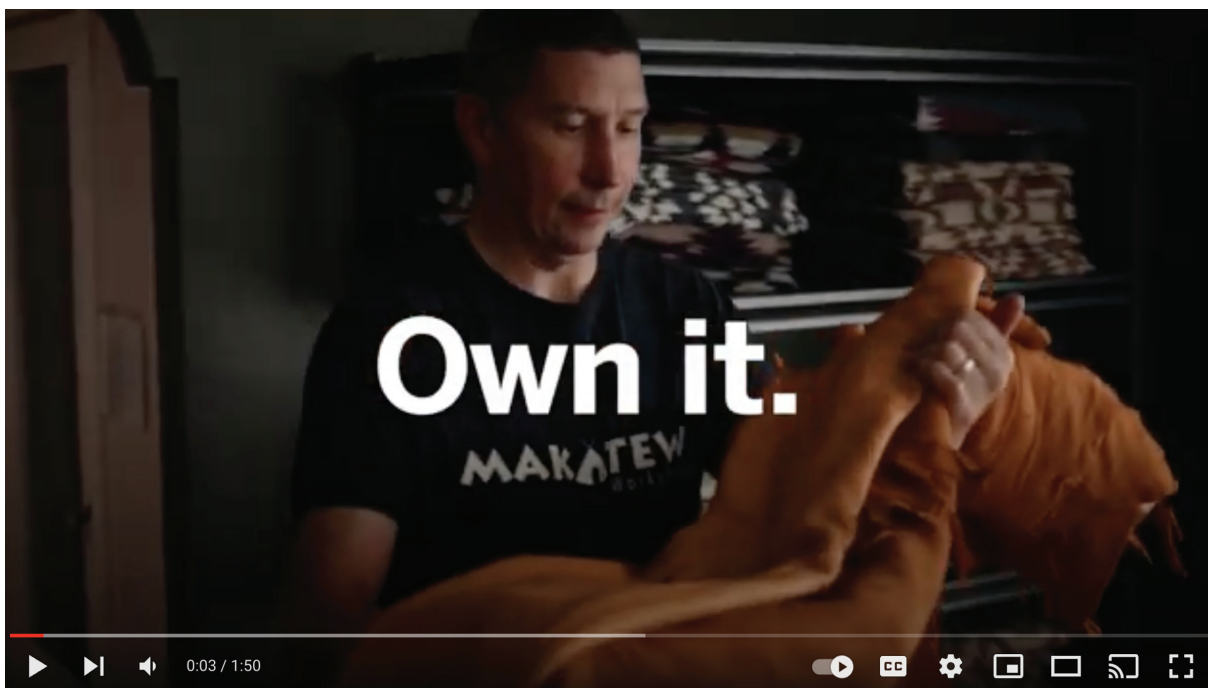
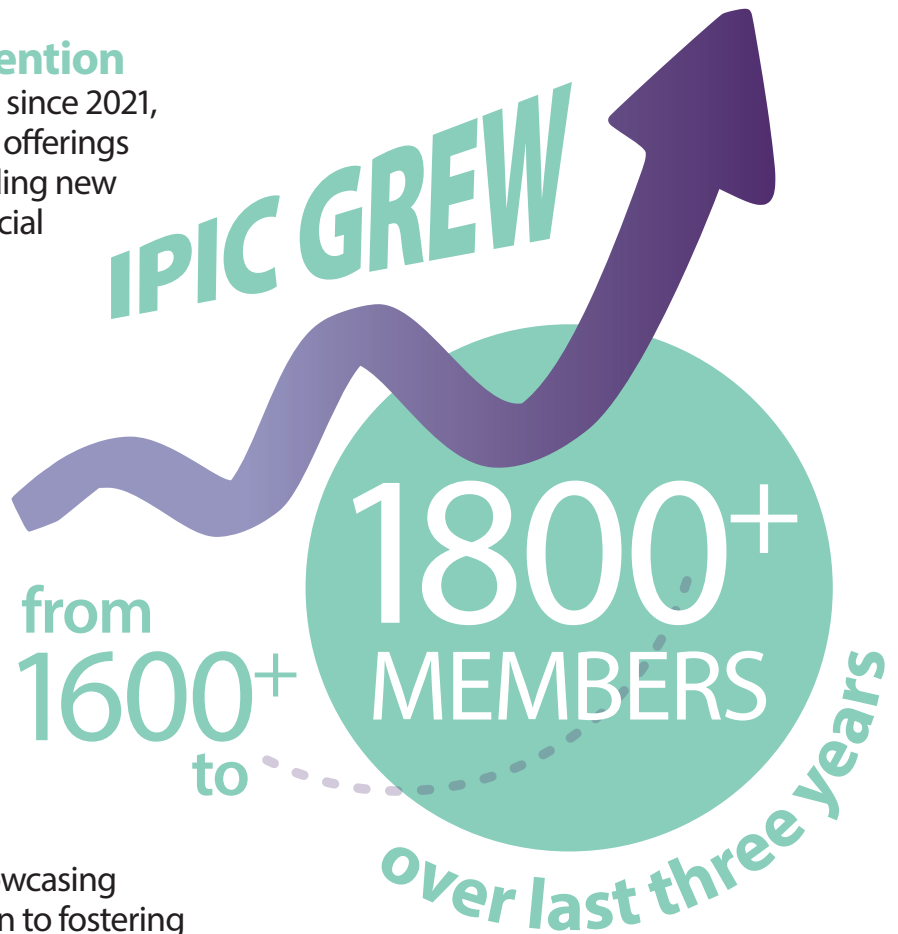
Member Experience

Member Recruitment & Retention

With hundreds of new members added since 2021, IPIC continued to develop exciting new offerings and benefits to our membership, including new membership categories, community social hours, virtual town halls, and new IPIC award categories. This was possible thanks to IPIC’s over 360 dedicated volunteers supporting our committees and communities.

Own It. Campaign

IPIC’s **Own it.** marketing campaign demonstrated a commitment to inclusivity and diversity by incorporating fresh promotional materials that prominently featured Indigenous businesses. This strategic expansion of the campaign showcased Indigenous entrepreneurship while showcasing a tangible expression of IPIC’s dedication to fostering awareness, understanding, and support for Indigenous businesses within the intellectual property landscape.



Virtual Visibility

IPIC's social media presence grew these past 3 years. Notably, January 2022 marked a surge for us on LinkedIn, as we welcomed an impressive of 957 new followers. This substantial growth represented a 28% increase when compared to our follower count in January 2021, underscoring IPIC's expanding reach and influence in the intellectual property landscape.

Communications (2022)

Twitter (now X) - 2.7K followers
LinkedIn - 5,183 followers
Facebook - 423 followers

Communications (2021)

Twitter (now X) - 2.5K followers
LinkedIn - 4,172 followers
Facebook - 346 followers



IPIC's weekly
IP Newsbreak
has an email
open rate of 59%



2.7K followers



5.9K followers



475 followers

Recognition

IPIC received the prestigious Award of Distinction from the Canadian Society of Association Executives, a testament to the outstanding success of the **'Your profession. Our purpose.'** membership campaign. This accolade recognizes IPIC's excellence in association management and underscored the campaign's effectiveness in communicating the IPIC's dedication to serving IP professionals.



Other Achievements

- Since 2021, +95% of IPIC members have consistently expressed satisfaction with our member communications on an annual basis.
- IPIC participated in National Volunteer Week spotlighting IPIC's various volunteer groups and the important work they do for the profession.
- Volume 36 of the Canadian Intellectual Property Review (CIPR) published, printed and sent to membership.

Conclusion

In conclusion, the 2021-2023 success report celebrates the culmination of a remarkable journey for IPIC over the past 3 years. We are thankful for our past Presidents, Board Members, staff and volunteers for their unwavering commitment to IPIC. As we bid farewell to the 2021-2023 Strategic Plan, we acknowledge the collective triumphs that led us here. Our efforts in promoting innovation, advocacy, and IP education has fortified IPIC's standing as a key voice in the intellectual property landscape.

As we transition into a new strategic plan cycle, IPIC invites you to delve into our **2024-2026 Strategic Plan: Moving Forward Together**. This plan builds off of our past accomplishments and sets IPIC up for an exciting future ahead. Together, let's continue to shape IPIC's path forward by elevating the voice of IP, fostering a culture of professional development and thought leadership, and promoting a world-class IP community.

