The Transition Period in Creation of a College of Patent and Trademark Agents

open. The logistical,

transition period.



Creation of 'The Transition Team'

This team would be responsible for overseeing, completing, or organizing many of the initial steps needed as part of the transition. This includes the search and hiring process for a Registrar / CEO of the College.

Hiring of Registrar or CEO

This individual will be the actual person in charge of the day-to-day activities of the College when it is operational. The transition team would presumably be responsible for interviewing candidates and ultimately hiring the first Registrar. This can be a protracted activity, and the transition team will want to move on this particular matter

Board of Directors

Early on in the process the individuals who will comprise the first Board of Directors will need to be identified and put into place. The Board will presumably be responsible for approving or overseeing a number of the transition period activities.

The existing CIPO-IPIC examination system

is currently operational, and has been for many years therefore this is not the highest priority item for development during the **Complaints/discipline system** transition period. That said, a transition of Although unlikely, the practical reality is that the exam development, and exam board needs to happen in the months leading up such a system will need to be in place on day one of the College being to the opening of the College, to ensure the College is well-prepared for financial, and personnel the first patent or trademark requirements would need to be considered within the agent exams. Following the transition period, the College will analyze how it runs and make amendments to the process or exam as required. months 12-2 months 20-2

The opening of the College signifies the end of the transition period, and the start of an ongoing refinement of systems required to effectively regulate the profession of patent and trademark agents in Canada.



Enabling legislative amendments create a College of Patent and Trademark Agents.

Start-up capital to be arranged: Pre-Registrar

The College will require capital to cover the costs of the transition period activities and early operations until it can be cost recovered through licensing fees etc. This could be in the form of a bank small business loan, and/or a short-term loan from IPIC. The possibility of the timing of the college may lend itself (if opened midway through a year) to CIPO sending some of the money collected for the licensing fees from agents to the College.

Office space

Office space for the new College in Ottawa will need to be identified, secured, designed and built out. During the first 6 months to a year, IPIC could house the newly hired Registrar until he/she hires more staff and secures an office space for the College.

Hiring of College staff This will be the

necessary staff that will report to the Registrar and will be responsible for performing the day-to-day work of the College. It would be preferable that the Registrar have operations and HR planning complete before hiring of staff.

IT requirements

months

(including in respect of the maintenance of the TM/patent registers) In addition to the standard IT requirements of any modernday office, this would involve the necessary infrastructure for the maintenance of the patent and TM registers of qualified practitioners, and working with CIPO to ensure they have access to the database of licensed agents. There is also requirements for tie in to an e-commerce platform for payment of fees, and other CLE, and insurance requirement information This will require an RFP, building a customized CRM and website, testing, and staff training.

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Miscellaneous operations

There will likely be numerous miscellaneous operational items that need to be dealt with during the transition period. Although not exhaustive, these would include: establishing by-laws, policies, committees, incorporation as a not-for-profit organization, branding and marketing assets, procurement of office and liability insurance, purchase of computer hardware, furniture, open bank accounts, establish signing officers, and more.