Annual Report



The voice of intellectual property professionals

IPIC at a glance



OurTeam



ADAM KINGSLEY Chief Executive Office



LORETO LAMB Director of EDI and Stakeholder Relations



KIM ARIAL Manager of Education & Events



ROBYN O'NEILL Communications Office



NNE-JOSÉE DELCORDE Director of Education



CHRISTINA LOCMELIS Director of Communication: and Member Services



ALICE VALSECCHI Education Officer



CHARU BHARGAVA Accountant

IPIC President & Chair of the Board

During IPIC's virtual Annual General Meeting (AGM) on Wednesday, September 29, 2021, Louis-Pierre Gravelle of Bereskin & Parr LLP was elected IPIC President and Chair of the Board for the 2021-2022 term. Louis-Pierre previously served as IPIC's Vice-President from 2020-2021, Secretary from 2019-2020 and Treasurer from 2018-2019.

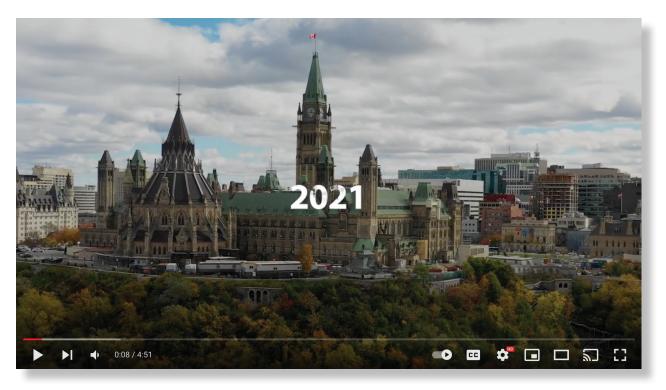
During his over 20 years with IPIC Louis-Pierre has contributed his time and expertise to numerous IPIC Committees and Communities providing his insights on various areas of importance to the IP profession. These include IPIC's Patent Committee, Internet



and Technology Committee, Professional Regulation Committee, Licensing Committee, Intervention Committee, IP Trade Policy Committee, Information, Communications and Technology Committee, and the Industrial Design Committee. Louis-Pierre is also frequently invited to speak on various IP topics in both official languages for a variety of IP events and engagements held by our stakeholders and partners.

During the last year IPIC made great strides in implementing and actioning its 2021-2023 Strategic Plan thanks to the great leadership of IPIC's immediate Past President Stephanie Chong and it looks forward to continuing this success under Louis-Pierre's direction over the next year.

View our 2021 Year in Review video highlighting our major successes and accomplishments over the past year.



Board of Directors

Along with the election of the new IPIC President and Chair of the Board at the 2021 AGM IPIC members also voted in a new IPIC Board of Directors for the 2021-2022 term. The Board is composed of nine members: four officers, the immediate past president and four directors. To take into account the diversity of roles existing in the profession, the Board is comprised of IP lawyers, patents agents, trademark agents, litigators and corporate practitioners.

IPIC wishes to thank outgoing Past President Alain Leclerc and outgoing Board Members Curtis Behmann and Sana Halwani for their invaluable contributions to its Board over the years.



Furthermore, during the 2021 AGM IPIC passed by-law amendments that resulted in the creation of two new member categories, one for Certified Administrators and the other for In-house Associates. These new categories will provide lower membership fees and the opportunity for customized programming for in-house agents and for administrators. Additionally, for the second year in a row IPIC froze 2021 membership dues for all members outside of changes for inflation.

Strategic Plan

2021 marked the first year of implementation of IPIC's current 3-year strategic plan. The 2021-2023 plan includes four goal areas and objectives, three of which are the ongoing foundational pillars of the association. The fourth, is Equity, Diversity and Inclusion, a goal which IPIC believes stands on its own, as well as underlying and informing its other strategic goals.

- 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
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Equity, Diversity & Inclusion

IPIC strives to reflect Equity, Diversity and Inclusion (EDI) in both the diversity of the IP profession and the Canadian population. This year, IPIC Board of Directors approved revisions to the Chair and Vice Chair Nomination Guidelines. IPIC's Webinar Submission form was also revised to reflect IPIC's EDI initiatives. In collaboration with members of the Indigenous IP Committee, a land acknowledgement and guidelines were created, and added to the IPIC website and all webinars and education presentations.

Feminist Response and Recovery Fund Grant

As part of its EDI plans IPIC submitted a grant application to the *Feminist Response and Recovery Fund* announced in early 2021 by the Minister for Women and Gender Equality and Rural Economic Development, the Honourable Maryam Monsef. The \$100 million government fund was launched with a call for proposals on projects that support the increase of women and girls' participation in Canada's economic, social, or political life, as well as other diversity and inclusion related projects.

IPIC was informed it is one of 168 organizations that will be granted funds and will receive approximately \$506,000 for its proposal for a pan-Canadian strategy for education and awareness initiatives in the IP and innovation sector on the importance of EDI.

Focus Group

Through the years there has been an increasing focus on EDI on a global scale and IPIC is committed to becoming a leader on these issues for our profession. Starting with our own organization and over the next three years IPIC is seeking to identify the concrete steps it can take to enable the IP profession and innovative industries to embrace EDI best practices. The first step towards achieving this goal was to pull together IPIC's first EDI Focus Group to engage in discussions on how IPIC can best promote EDI, how it can best integrate EDI into its own governance and leadership development processes, and how it can support the IP industry in doing so.

A vast number of issues were discussed which led to great conversations about IPIC's role in seeking out the advice of experts in the field to help the association develop EDI education and training for the Canadian IP profession.

IPIC would like to thank each member that contributed to this important conversation. Their passion for EDI and for the advancement of EDI in the IP profession is a great asset to the association and all IP professionals.

Focus Group Working Sessions			
Developing a Roadmap		IPIC	
WORKBOOK	Sective, IPC will also seek opportunities to expand the membership and beindmains and atrong/barring neorultiment of balloc. Canadams to the Diffus to secondary and post-secondary isothorilons.		
Draft v. 19 April			
ECTION 1: BACKGROUND AND CONTEXT	est Practices in Equity, Drug	rsity and inclusion	
The Intellectual Property Institute of Canada recertly released its 2021-2023 Strategy: Plan which induces foor Interconnected and mutually supporting detectives, one of which is faculty, Diversity, and induces (DDI). We is committed to becoming a lader on CED success, starting with our owan signification. We are seeing to identify concrete steps we can take over the next 3 years to enable the profession and notarity to reentance (TBH test practices.	solve of III professionals, the develop of the di-work of Canado's propulsion. Research conducted by the during field a notacide genero, togal arrong Canada's III professional associations in and storate or any operation of Canada's III professional audious, training, and raining exercises on ICD ben profession.		
To achieve this IPIC is conducting these working sessions, supporting a small focus group to discuss how PIC can be to promote equity, diversity, and indusion and how best to integrate EDI into its governance and support industry best practices. Or hope in that occurs from these sessions can be used by IPIC to reate an roadmap that will guide IPIC's activities in the years ahead.		HACKSADURD DOCUMENTS in invited to participate in the working sessions. Links to their bios	
forming the foundation for this work is the EDI Goal and Objectives from our new Strategic Plan.		1.00	
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Research consistently shows that high levels of gender and ethnic diversity are positively correlated with	ent of Board	https://www.hofferader.com/tavyers/stephanie- shong	
company performance. IPIC therefore believes that promoting equity, diversity and inclusion is a key	ere or board	https://www.robic.co/m/brofessionnet/lowin-	
pal which stands on its own, as well as underlying and informing the other strategic goals. A report by WcKinsey notes that, over the past five years, the likelihood that diverse companies will out earn their	P Conventies Chair		
ndustry peers has grown. Nonetheless, Black, Indigenous, and People of Colour (BIPOC) are under-	O Degrees in or Networking	https://www.dancypc.com/paula-dancy.html	
represented in the IP community relative to the Canadian population, which has been a concern for		Providence Constant Annual Constant	
ndustry leaders for several years. IPIC is committed to becoming a leader on equity, diversity, and	withC as a grant writer for EO	Manu/www.linkedin.com/n/sherim/ones623/2eri Enells/bdomains/a	
nclusion (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.	6. Indigenous IP Committee MS to founder	https://www.fot.cf.gc.ca/en/pages//stout-the- marty/wenders-of-the-marty/adject/stout-the- honourable-janet-in-fullyar	
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IP Policy & Growth

In 2021:

- Over 75 meetings with representatives of the Government of Canada or provincial governments.
- Parliament's Standing Committee on Finance (FINA) adopted two of IPIC's recommendations for IP incentives in their 2021 report, a first patent program and a brand protection subsidy.
- BC's Premier in response to IPIC's requests included a first patent program and a provincial IP framework in the mandate letter to the BC Minister of Jobs, Economic Recovery and Innovation. IPIC met with the Minister's policy team to begin discussions on the framework.
- After several IPIC meetings with Finance Canada and the Minister of Finance, Budget 2021 included over \$90M in direct IP related funding for industry to access IP services as well as making IP a reimbursable expense and calling for changes to the Canada Small Business Financing Act to allow lending against IP assets for start-ups.
- Past Chair of IPIC's IP Trade Policy Committee and former IPIC Board Director, Nathaniel Lipkus testified before the House of Commons to the Standing Committee on International Trade in response to Canada's International Trade and Investment Policy: Selected Considerations Concerning COVID-19 Vaccines.
- IPIC Vice President Louis-Pierre Gravelle facilitated a panel discussion on IP and Exports for Minister of International Trade, Export Promotion, Small Business and Economic Development, the Honourable Mary Ng.

College

2021 was a very busy year for IPIC in establishing the legal framework for the College of Patent Agents and Trademark Agents (CPATA). Dozens of meetings took place over the span of a few months between then IPIC President Stephanie Chong, CEO Adam Kingsley, and FAQ: College of Patent Agents and Trademark Agents - Regulations



various ISED representatives from the Ministers of Innovation, Science and Industry's Office, CIPO, and the Marketplace Framework Policy Branch team. The meetings were focused on developing amendments to the college regulations to solve problems identified by the profession with the draft regulations. Throughout that time IPIC often brought in content experts from membership to speak to specific issues.

Thank you to all that participated in the efforts on behalf of the profession. IPIC's lobby campaign was successful in getting amendments to address all of our major recommendations. The final regulations were published in *Canada Gazette Part II* on June 23, 2021, and the CPATA opened their doors on June 28, 2021.

Submissions

Submissions

IPIC committees work on a variety of submissions each year. These can be a response to a government consultation, a court intervention or on an IPIC initiative.

In 2021, IPIC sent 8 SUBMISSIONS to government.

Intervention

IPIC's Motion to intervene in Benjamin Moore & Co. v. Attorney General of Canada was granted in September 2021. IPIC was represented on the intervention by Julie Desrosiers and a team from Fasken Martineau Dumoulin LLP.

Thanks to its Patent Committee IPIC responded to a consultation on the proposed <u>amendments</u> <u>to the Patent Rules</u> that were published in the Canada Gazette, Part I at the beginning of July. The Committee assembled feedback received from a survey to IPIC members and developed a submission which focused primarily on the request for continued examination (RCE) and excess claim fee (ECF) regimes. Please click <u>here</u> to view IPIC's full submission.

With the help of its Copyright Committee IPIC responded to **many Government's consultations** this year including a response to a Modern Copyright Framework for Artificial Intelligence and the Internet of Things, a Modern Copyright Framework for Online Intermediaries, How to Implement its CUSMA Commitment to Extend Canada's General Copyright Term of Protection, and a submission on Bill C-10 and the proposed consequential amendments to the *Copyright Act* in respect of Ephemeral Recordings and the Retransmission Regime.

	IPIC Submissions	M. Marketank	L.
IPIC initiative. This search engine permits you	sions each year. These can be a response to a governmer a to see what IPIC has been working on over the past few y IPIC members have access to the entire text of the sub	years and become familiar with our	
If you are interested in a particular submissio	n, please contact: <u>admin@ipic.ca</u> .		
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TITLE Summitted After YYYY-MM-DD RECEPTENT	VYYY-MM-DD	•	
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IPIC also issued a joint submission with the Canadian Bar Association to the Federal Court Intellectual Property Users Committee in response to matters raised by the Bar during their November 26, 2020 meeting. As experts in Canadian IP law IPIC and CBA were invited to provide input on these matters, the submission detailed issues of concern to the judiciary and to the

profession and included the following: Case and Trial Management Guidelines for Complex Proceedings and *Proceedings under the PM(NOC) Regulations* dated October 16, 2020, Requests to admit; Costs – changes to Tariff B quantum on consent; Virtual and/or hybrid hearings, and Early provision of patent claims charts. Specific recommendations were provided for each issue along with alternative processes and protocols which are outlined in the full **letter** found <u>here</u>.

Outreach & Awareness

Despite another year of restrictions to in-person events IPIC engaged in conversations and partnerships with over 25 stakeholders and presented virtually 11 times to existing partners. IPIC also connected for the first time with other organizations including the Rideau Hall Foundation, 50/30 Challenge, and the Canadian Centre for Diversity and Inclusion.

In March IPIC participated in International Women's Day (IWD) 2021 by running its first ever IWD Spotlight Series highlighting incredible women within the profession. In April for National Volunteer Week IPIC recognized its various volunteer groups and the important work they do for the association and the profession.

IPIC also joined its partners and stakeholders for other notable events such as World IP Day, Canadian Innovation Week, and National Indigenous History Month where numerous IPIC members delivered webinar, session, and podcast presentations to mark the events.

A new collaborative effort was also launched this past year, appropriately named the *IP Village*, between IPIC, CIPO, BDC, EDC, and CNRC. This group, with a vested interest in IP Awareness in Canada will deliver webinars, workshops and information sessions to Canadian SME's and entrepreneurs looking to protect and grow their business. More exciting news to come on this in 2022!







Fondation Rideau Hall Foundation

FROM PROBLEMS TO POSSIBILITIES

#CanadianInnovationWeek

CANADIAN INNOVATION WEEK

SEMAINE DE L'INNOVATION CANADIENNE





Educations & Skills

- Provided continuing professional development to over 5,000 mid-late career participants.
- Released the new trademark on demand module Evidence in Trademark Office Proceedings.
- Offered 2 interactive workshops on mentoring and transitioning to virtual practice.
- Educated IP professionals on best practices in Equity, Diversity and Inclusion.
- Introduced French-language programming in partnership with FORPIQ and LES Québec.
- Offered summer courses in trademarks, patents and copyright with McGill University.
- Provided training and exam preparation to new members of the IP profession.
- Offered 3 free webinars including the College of Patent Agents and Trademark Agents -Regulations webinar in July with over 600 registrants. IPIC2021 Virtual
- Held IPIC's second virtual Annual Conference: IPIC2021 Virtual.

Certification Programs

This year, 36 candidates passed the Trademark Administrator Exam and/or the Patent Administrator Fxam.

Newly certified trademark and patent administrators were provided with an endorsement kit to act as ambassadors for the programs. The kit includes samples of social media posts, testimonials, e-certificates and digital badges for use in their e-signatures and on social media.

During IPIC's 2021 AGM the introduction of a Certified Administrator member category was approved. This category is specifically for those who have completed, or in the process of completing either of IPIC's two certification programs.

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"Don't miss out on your chance to work in the field of trademark law in Canada. IPIC's #TMAdmin program will provide you with the tools and knowledge to start your career as a Certified				

Debbie Valois (Borden Ladner Gervais) Law Clerk, Certified Canadian Trademark Administrator Course Contributor

Trademark Administrator."



Certified Canadian Trademark Administrator Gestionnaire de margues agréé canadien

n and IP: Kevs to Unlockina Economic Renewal October 14-15, 2021



Certified Canadian Patent Administrator Gestionnaire de brevets agréé canadien



Member Experience

Awards

IPIC Awards honour outstanding contributions and leadership from outstanding members and are presented each year during the IPIC annual conference, this year **IPIC**2021 Virtual took place on October 14, 2021.

Outstanding Contribution Award

Jenna Wilson for having gone above and beyond expectations of IPIC volunteers on its response to the development of regulations for the College of Patent Agents and Trademark Agents, as well as two separate comprehensive responses to consultations to amend the Patent Rules, among other



IPIC Outstanding Contribution Award Jenna Wilson

Partner Wilson Lue LLP

initiatives Jenna was presented with the Outstanding Contribution Award.

Roger T. Hughes Future Leader Award

Meika Ellis is the first recipient of the Institute's Roger T. Hughes Future Leader Award. Meika received the award for having made significant contributions to IPIC's Indigenous IP Committee and for spearheading an initiative between IPIC and the Canadian Council for Aboriginal Businesses.



Roger Hughes Future Leader Award

Meika Ellis Ridout & Maybee LLP

Committees and Communities

IPIC has over 360 dedicated volunteers that support the association in various essential ways, the majority of these volunteers serve on IPIC's 23 Committees and 5 Communities. With the help of these groups which are divided into various areas of expertise, IPIC continues to provide unmatched services to its members.

As part of its biannual Committee Rotation process IPIC updated its Committee and Community <u>mandates</u> this past year and introduced two new Committees for the 2021-2023 term; the Patent Administrators Committee and the Trademark Administrators Committee.

CIPR

The Canadian Intellectual Property Review (CIPR) is a double-blind peer reviewed journal sent to over 1,700 IPIC members at no cost and can be purchased by non-members for a fee.

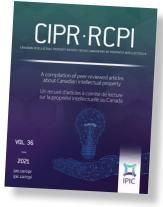
In December 2021 Volume 36 of CIPR went to print, with 6 articles covering diverse aspects of intellectual property in Canada and abroad. Volume 36 will be distributed and available in January 2022.

Your Profession. Our Purpose

In line with it's 2022 membership renewals IPIC launched its **Your profession. Our purpose.** campaign to promote the association's value proposition and benefits of membership. The goal of the campaign is to enhance the IPIC brand, reinforce its value, stabilize membership retention, and increase awareness and engagement with members.

The campaign provides information about all the various ways an IPIC membership benefits and supports IP professionals. While IP professionals are protecting the vest interest if their clients, we are protecting their by advocating for policy change, offering professional development opportunities, extending our outreach efforts and increasing awareness of the IP profession. The assets of the campaign include a customized microsite <u>ourpurpose.ca</u>, direct marketing strategies, social media promotion, and ads.





Communications

2.5K followers 320 tweets in 2021 4,470 engagements in 2021



4,172 followers 346 posts in 2021 3,164 engagements in 2021 **346 followers** 258 posts in 2021 300 engagements in 2021

IPIC's weekly IP Newsbreak has an email open rate of 49%. The average email open rate for non-profits is 25%. IPIC had over 258,000 visitors to the website in the last year.

Top 5 Most Visited Areas of **ipic.ca** in 2021 (after landing on homepage)

Board of Directors

- 2 How to Become an Agent
- 3 Committees/Communities
- 4 Advocacy
- 5 COVID-19 Updates

Top 5 Geographic Locations of **ipic.ca** Visitors



2020-2021 Financial Summary total income \$1,567,493



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Advertising & Sponsorship



\$639,679

\$48,285