

IPIC Strategic Plan Progress Update

Q1

Q2

Q3

Q4

Q1

Q2

Q3

Q4

Q1

Q2

Q3

Q4

2018

2019

2020

- 15 government meetings (incl. PMO and 2 Cabinet Ministers), and 3 responses to consultations
- 65 new members and launch of our member referral program
- 841 registrations for PD offerings and 556 hrs of CPD issued

- President Lynds Addressed UK Trademark Profession at CITMA
- 15 webinars offered, 3 in the new 'advanced series'
- 5 media interviews, op-ed published in the HT, and entered into agreement with CISION to increase IPIC's presence in the media

20%

ADVOCACY

IPIC focused its advocacy efforts in Q1 on its IP incentives recommendations for the federal budget. On the heels of wins by getting all three recommendations in the FINA pre-budget report and the patent box tax incentive in the third report of the Advisory Council on Economic Growth, IPIC continued to meet with Finance and ISSED officials in the days leading up to the budget release, including participation in the budget lockup. IPIC also continued to discuss with ISSED and Minister Bains' office the merits of including enabling legislation for the College of Patent and Trademark Agents in the National IP Strategy.

25%

PROFESSIONAL DEVELOPMENT

IPIC established the IP Paraprofessional Advisory Committee and began program outlines and curricula for patent and trademark administrator courses. The Trademark Administrator Program will launch its first course from the series this spring. Registration for the 2018 IPIC-McGill IP summer courses is now open. The IPIC Forums & Seminars Committee is finalizing the 2018 Annual Conference program to be held in Vancouver, Oct. 10-12. IPIC also confirmed the dates and location of the 2020 Annual Conference: Sept. 30 - Oct. 2 in Whistler!

10%

OUTREACH & AWARENESS

IPIC selected finalists from RFP for business awareness campaign on value of IP to growth and sustainability. Completed stakeholder engagement strategy, identifying 300 stakeholders from industry associations, incubators, innovation centres, legal and IP organizations. Worked with CIPO on updating Bank of Speakers program. Engaged businesses and stakeholder groups on outreach and awareness activities. Began discussions with educators on a high school IP curriculum.

10%

STEWARDSHIP

In early January, IPIC Council set IPIC's operating plan priorities for 2018. These priorities will guide the association's activities for the year, along with the results of IPIC's membership survey conducted in February. IPIC continued work on improving its web presence by building a new website that will launch in the fall of 2018. IPIC began implementation of a new social media strategy, which included the launch of a Facebook account in January, and social channels generating 60 000 impressions between LinkedIn, Twitter, and Facebook accounts.



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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Q4

▲ 2018

2019

2020

- Minister Bains announces IP Strategy including creation of College of Patent and Trademark Agents
- 19 government meetings (incl. CIPO, ISED, MPs & Senators)
- 100+ MPs, Senators & business professionals attended a successful WIPD event on Parliament Hill

- Allocation of \$5M of funding over five years for Copyright Board reform, resulting from IPIC recommendation
- Built relationships with over 15 key stakeholders
- Launch of first course in IPIC's Trademark Administrator Program



ADVOCACY

Following Minister Bains' announcement on the IP Strategy, IPIC met with several opposition MPs in key roles to explain the benefits of the creation of a College of Patent and Trademark Agents. This included meetings with the Office of the Leader of the Opposition, both Chairs of INDU, and other Conservative and NDP Members of Parliament. Meetings with ISED continue in order to stay informed of developments. IPIC also began its summer advocacy plans with a grassroots campaign in Ontario for the development of a provincial IP strategy and the creation of IP incentives.



PROFESSIONAL DEVELOPMENT

IPIC launched the 1st course of the Trademark Administrator Program and continues work on the remaining 3 with the goal of launching all courses by the end of 2018. A new Trademark Opposition Proceedings Module was launched. IPIC presented 21 webinars and 2 in-person events, including its 1st business development and networking breakfast in Toronto. 2018 Annual Conference program was announced and registration opened. New webinar pricing was introduced making webinars more affordable for members in sole and small practices.



OUTREACH & AWARENESS

IPIC continues its work on its IP awareness campaign targeted to businesses and on creating media relationships; quoted/interviewed 7 times and met with Globe and Mail journalist to introduce IPIC. Made significant progress on outreach & awareness initiatives including an IBM Stem4Girls event. Discussions with U.S. National Inventors' Hall of Fame and FICL are underway to support student innovation in Canada. Began discussing potential business outreach and networking opportunities with the Canadian Chamber of Commerce.



STEWARDSHIP

IPIC President and Executive Director took part in a cross-country President's Tour to meet with members to provide an update on IPIC activities and to gather member feedback. IPIC also continues its efforts to modernize its offerings with the redevelopment of its website (scheduled to launch in the fall), the signing of a contract to modernize its professional journal (Canadian Intellectual Property Review) and the launch of an RFP for a committee audit, with the goal of streamlining the committee structure and processes.

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- Appeared before the House of Commons’ Standing Committee on Finance during their 2019 pre-budget consultations
- 19 members were involved in a set of meetings with Ontario MPPs to promote the need for IP incentives as part of IPIC’s grassroots advocacy campaign

- Represented North America at the Global Network Summit; a meeting of international IP professional associations
- 4 submissions to government, including comments on the revisions to Chapter 17 of MOPOP and the statutory review of the *Copyright Act*

ADVOCACY

40%

IPIC members took part this summer in an Ontario grassroots effort to educate newly elected MPPs about the profession and the importance of IP to Ontario’s economic growth strategy. IPIC also met with Federal MPs in their constituency offices to discuss the 2019 federal budget and the recently announced national IP strategy. President Grant Lynds appeared before the Standing Committee on Finance to promote a first patent program and IP box tax incentive. IPIC committees also continued discussions with CIPO on regulatory reforms and subsequent office practice changes.

PROFESSIONAL DEVELOPMENT

35%

IPIC launched Course 2 of the Trademark Administrator Program as well as the fall editions of the Trademark Agent Exam Prep Course and the Patent Agent Training Course in live and live streamed formats. The IPIC-McGill Summer Courses in IP yielded an increase in the number of attendees over the previous year. IPIC presented six webinars covering substantive law, ethics and leadership skills, ranging from basics to advanced practice levels.

OUTREACH & AWARENESS

30%

IPIC’s President participated in a webinar organized by Export Development Canada on Protecting IP in global markets. Membership engagement increased on IP awareness, with over 20 members participating in student and business outreach initiatives including IBM STEM 4 Girls and collaborating with the First Institute of Canadian Inventors (FICI). IPIC met with various key stakeholders for business and entrepreneurial outreach including Canadian Chamber of Commerce and Assembly of First Nations.

STEWARDSHIP

30%

IPIC made significant progress in updating its website and membership database scheduled to launch in the fall. The new look and feel of the Canadian Intellectual Property Review was finalized and will include a compilation of articles submitted throughout the year. The journal will be unveiled at the Annual Conference. IPIC also continued working with its external consultant on its committee audit which reviews IPIC’s current committee structure and processes. Results from the surveys, interviews and peer comparisons will be reviewed by IPIC Council in Q4.



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- Enabling legislation for the Creation of a College of Patent Agents and Trademark Agents receives royal assent
- For a 2nd year in a row, the FINA pre-budget consultation report includes both of IPIC's recommendations on IP incentives (first patent & IP box)

- First flight of **Own it.** awareness campaign reaches 8M impressions and over 11K views on www.ownyourIP.ca
- All 4 courses of IPIC's Trademark Administrator Certification Program now launched



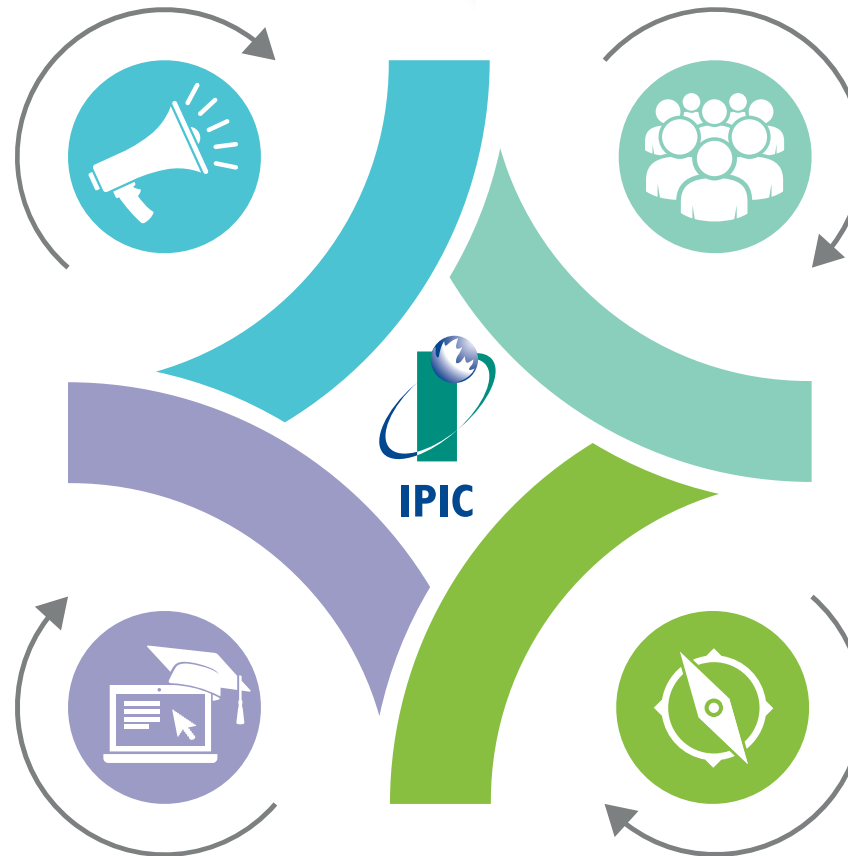
ADVOCACY

Q4 was very busy with the tabling of Bill C-86, which included legislative changes from the National IP Strategy. IPIC worked against short timelines on submissions, speeches & meeting prep for MPs, Senators, and department officials to ensure IPIC members voices were heard. IPIC was successful in getting two of the four amendments made by Parliament to the 884 page Bill. This was a significant win for IPIC's government relations efforts. IPIC Past President Grant Lynds appeared before FINA to discuss IPIC recommendations for IP incentives, while IPIC President Patrick Smith appeared before the Senate AGFO.



PROFESSIONAL DEVELOPMENT

IPIC's Annual Conference received a 20% increase in delegates and was one of its most highly rated conferences to date. IPIC launched the last two courses of its Trademark Administrator Program and begins work on the certification exam for the course. IPIC offered 8 webinars in Q4, including a free webinar for members on the new *Patent Rules*, attracting over 400 participants. IPIC co-hosted with FORPIQ a successful business development & networking event in Montreal. Finally, IPIC offered its yearly Trademark Agent Tutorials and began its Patent Agent Tutorials.



OUTREACH & AWARENESS



IPIC's Patent and Trademark Institute Education Foundation partnered with IBM Canada to host an IP focused STEM4Girls session in parallel with the IPIC Annual Conference. IPIC members presented on IP at a Spark Niagara event for startups, continued discussions with groups such as CIGI, and began new discussions with Engineers Ontario and the Association of Consulting Engineering Companies. IPIC successfully launched its public awareness campaign called **Own It.** generating over 8M impressions (views) on social media so far.



STEWARDSHIP

IPIC revealed the revitalized printed Canadian Intellectual Property Review (CIPR) at its Annual Conference. The CIPR is now an online-first peer-reviewed journal with a printed annual compilation. Also at the conference, IPIC unveiled its "Year in Review" video highlighting IPIC's 2018 successes. IPIC Council and staff continue to look at ways to improve the member experience and are currently reviewing a committee audit report and recommendations for streamlining IPIC's committee process. IPIC's membership has increased for the 2nd year in a row, with a strong member retention rate and a significant increase in new members over 2017.

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