



United States Patent and Trademark Office Global Intellectual Property Academy Trademark Administration Program

DRAFT AGENDA

Global Intellectual Property Academy
United States Patent and Trademark Office
James Madison Building, East 2nd Level
600 Dulany Street
Alexandria, Virginia 22314, USA

(Unless otherwise noted, all classes will be held in this location)

Coordinators:

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Day 1: Monday, 29 November 2010

9:00 – 9:15 a.m. **Registration**

9:15 – 9:30 a.m. **Welcoming Remarks**

Sharon Marsh
Deputy Commissioner for Trademark Examination Policy
U.S. Patent and Trademark Office

9:30 – 10:00 a.m. **Video Introduction to the USPTO**

10:00 – 10:10 a.m. **Program Overview**

Scott Baldwin, Attorney
Office of Policy and External Affairs
United States Patent and Trademark Office

10:10 – 11:00 a.m. **The Importance of Intellectual Property Protection and an Overview of the USPTO organization** – Topics will include an overview of the USPTO mission and organizational structure, TM organizational structure and the economic importance of protecting intellectual property.

Deborah S. Cohn
Deputy Commissioner for Trademark Operations
U.S. Patent and Trademark Office

11:00 – 12:00 p.m. **Strategic Planning and Organizational Assessment** – a discussion of the purpose of strategic planning, the process used in creating a strategic plan, how & why to assess an organization etc.

Karen Strohecker, Trademark Program Administrator
Office of the Deputy Commissioner for Trademark Operations
U.S. Patent and Trademark Office

12:00 – 12:10p.m. **Patent and Trademark Office Society (PTOS)
Visiting Scholars Mentoring Program**

Raymond Addie, Co-Chair, International Relations Committee,
Patent and Trademark Office Society (PTOS) and
Patent Examiner, Art Unit 3671
U.S. Patent and Trademark Office

12:10 – 1:30 p.m. **Lunch**

1:30 – 2:45 p.m. **The Budget Process, Goal Setting and Metrics** – a discussion of budget formulation; goal setting, and performance measures (i.e. what factors an intellectual property office should measure and how to measure these factors)

Karen Strohecker, Trademark Program Administrator
Office of the Deputy Commissioner for Trademark Operations
U.S. Patent and Trademark Office

2:45 – 3:45 p.m. **Tour(s)**

1. Trademark Examination Offices
2. Pre/Post-examination
3. TAC (trademark assistance center)
4. Public Search Room

Office of Public Affairs
U.S. Patent and Trademark Office

3:45 – 4:00 p.m. **Break**

4:00 – 4:45 p.m. **Fee Retention at the USPTO** - a discussion of the USPTO's path to becoming a completely fee funded organization.

Karen Strohecker, Trademark Program Administrator
Office of the Deputy Commissioner for Trademark Operations
U.S. Patent and Trademark Office

4:45 – 5:00 p.m. **Group Photograph**

Day 2: Tuesday, 30 November 2010

9:00 – 10:30 a.m. **Trademark Law Office Management** – a discussion of the structure of the tm law offices, hiring and retention of examiners, the role and responsibilities of examining attorneys, and the performance plan method used to manage the quality and production of examiners.

Meryl Hershkowitz, Group Director
Trademark Examination Law Offices
U.S. Patent and Trademark Office

10:30 – 11:30 a.m. **Trademark Examiner Training** – a discussion of tools used to train examiners, including a discussion of TEALE, e-learning training modules, examination reminder newsletters, and examination tips.

Lynn Luthey, Senior Staff Attorney
Office of Trademark Quality Review and Training
U.S. Patent and Trademark Office

11:30 – 11:45 a.m. **Break**

11:45 – 12:45 p.m. **Quality Review** – a discussion of all tools used to review quality (i.e. month quality reviews by managers, quality reviews by tqr, OG queries).

Kevin Peska, Managing Attorney
Office of Trademark Quality Review and Training
U.S. Patent and Trademark Office

12:45 – 2:15 p.m. **Lunch**

2:15 – 3:00 p.m. **IT Development and E-Government** – discussion of IT products and services used by TM ops and the history of IT use by both internal and external customers.

Betty Andrews, Director
Office of Trademark Program Control
U.S. Patent and Trademark Office

3:00 – 3:45 p.m. **Electronic Trademark Tools For Internal Customers** - an introduction and demonstration of electronic tools used by trademark examining attorneys including the electronic searching tool X-search and the electronic file and/or docket management tool FAST

Chris Doninger, Managing Attorney
Trademark Examination Law Office 104
United States Patent and Trademark Office

3:45 – 4:00 p.m. **Break**

4:00 – 5:00 p.m. **Electronic Trademark Electronic Desktop Tools for the Public** – an introduction and demonstration of electronic tools and internet resources available to the public, including a discussion on TEAS chronology, E-Filing Initiatives (TEAS/TEAS PLUS), TARR and TDR

Craig Morris, Project Manager
Trademark Electronic Application System
Office of the Commissioner for Trademarks

Day 3: Wednesday, 1 December 2010

9:00 – 9:30 a.m. **Records Management** – The process of becoming a paperless IPO.

Susan Fawcett
Office of Information Systems Development
United States Patent and Trademark Office

9:30 – 10:15 a.m. **Intellectual Property Policy Development**

- Rule Making
- Petitions
- Legal and Policy Development

Sharon Marsh
Deputy Commissioner for Trademark Examination Policy
U.S. Patent and Trademark Office

10:15 – 10:30 a.m. **Break**

10:30 – 11:15 a.m. **International Engagement** - a discussion of the mission of the Office of Policy and External Affairs, the role of USPTO policy advisors, and the U.S. position on TM harmonization.

Amy Cotton, Senior Counsel (Trademarks)
Office of Policy and External Affairs
U.S. Patent and Trademark Office

11:15 – 11:45 a.m. **Article 6~~ter~~ of the Paris Convention**

Scott Baldwin, Attorney
Office of Policy and External Affairs
United States Patent and Trademark Office

11:45 – 1:15 p.m. **Lunch**

1:15 – 2:15 p.m. **Administration of the Madrid Protocol**

Jennifer Chicoski, Staff-Attorney
Office of the Commissioner for Trademarks
U.S. Patent and Trademark Office

Felicia Battle, Supervisor
Madrid Processing Unit
U.S. Patent and Trademark Office

2:15 – 2:45 **Trademark Public Advisory Committee:** a discussion on the role of a Trademark Public Advisory Committee (TPAC) as a way to receive input on Trademark Office policies, goals, performance, budget and fees.

Sharon Marsh
Deputy Commissioner for Trademark Examination Policy
U.S. Patent and Trademark Office

2:45 – 3:00 p.m. **Break**

3:00 – 3:45 p.m. **Letters of Protest in Trademark Applications** - A discussion of an informal procedure whereby third parties can bring to the attention of the USPTO evidence bearing on the registrability of a mark.

Office of the Commissioner for Trademarks
U.S. Patent and Trademark Office

3:45 – 5:00 p.m. **Trademark Trial & Appeal Board (TTAB)** - to include an overview of the TTAB, the process for publishing decisions, and a discussion of efficient methods for conducting opposition and cancellation proceedings.

Trademark Trial & Appeal Board
U.S. Patent and Trademark Office

Day 4: Thursday, 2 December 2010

9:00 – 9:30 a.m. **Moving the USPTO through the 21st Century** - Commissioner Beresford will address issues and challenges of being Commissioner of Trademarks at the USPTO, including a discussion of USPTO efforts to meet strategic goals and guide the agency through the 21st century.

Lynne G. Beresford
Commissioner of Trademarks
U.S. Patent and Trademark Office

9:30 – 10:30 **Teleworking** - A discussion of the development and implementation of the USPTO tele-working programs, including a video presentation about the trademark work at home program.

Deborah S. Cohn
Deputy Commissioner for Trademark Operations
U.S. Patent and Trademark Office

Danette Campbell, Senior Advisor, Telework
Office of the Chief Administrative Officer
U.S. Patent and Trademark Office

10:30 – 10:45 a.m. **Break**

10:45 – 11:30 p.m. **Public Engagement: USPTO outreach**

- Discuss activities under Independent Inventor’s program, STOP, Intellectual Property Awareness Campaigns (IPAC), the Global IP Academy, USPTO IP Attachés

Susan Anthony
Office of Intellectual Property Policy and Enforcement
U.S. Patent and Trademark Office

11:00 – 11:30 a.m. **Congressional Affairs** – An overview of the role and function of policy attorneys in the office of governmental affairs; and the USPTO role in legislative issues related to intellectual property.

Office of Governmental Affairs
U.S. Patent and Trademark Office

11:30 – 12:45 p.m. **Program Evaluations and Presentation of Certificates**

12:45 – 2:00 p.m. **Pizza Party with PTOS**