

Trademark Fee Cost Analysis



TPAC Status Briefing #2 – Public
August 28, 2009

Agenda

- Trademark Fee Cost Analysis
- Objective
- Timeframe
- Status
- Accomplishments
- Next Steps
- Presentation
- Challenges
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Trademark Fee Cost Analysis

The Trademark Fee Cost Analysis is a joint project between CFO and Trademark Organizations to identify the *cost of work performed* for Trademark and TTAB Processing Fees.

OMB Circular A-25 requires Fee Studies.

Makes *good business sense*.



Objectives

- *Revise existing Trademark and TTAB models* to provide better cost information to support management decision making.
- *Develop a method for determining the cost per fee* for all Trademark and TTAB processing fee codes.
- Use cost information for *making management decisions* including future fee setting.



Current Timeframe - Revised

- Executive level kick-off – January 2009 (completed)
- Formal cost study team kick-off – March 2009 (completed)
- Costing model complete – August 2009 (on track)
- Fee Cost Analysis complete – September 2009
- Other costing requirements – October 2009



Project Plan - Status

- *Completed* Phase I and II – Trademark Model Revision
- *In-process* Phase III – Trademark Cost Analysis
- *Progress* made in making up time lost in July due to competing resource requirements
- *Finalizing* displays for reporting final results



Accomplishments

- ***Validated*** Trademark processes and activities through discussions with Trademark process owners
- ***Mapped*** activities to fee codes
- ***Identified*** activity drivers to allocate activity costs to fee codes
- ***Developed*** rules for distributing shared services and secondary costs within the model
- ***Revised*** Trademark cost model to capture 67 Trademark *fees* as final cost objects
- ***Discussed*** and validated shared service allocation methodology and work in process with Pil-bara



Next Steps...

- *Finalize* cost model including activities, workloads, fees and corresponding relationships, and validate initial set of results against FY 2008 costs (August)
- *Validate* results (August/September)
- *Finalize* displays of fee costs (September)
- *Validate* unit costs to total costs (September)
- *Calculate* costs with FY 2007 and FY 2009 data (September)
- *Deliver* final presentation to Executives (September)



Presentation of Final Results

- *Develop* details for final presentation
- *Present* mock-up displays by end of August
- *Identify* the *fully burdened unit cost* for all Trademark and TTAB processing fees
- *Display cost contribution* of direct and indirect costs for each processing fee unit cost



Challenges

- Defining and formalizing the *methodology* at the onset.
- Identifying and developing *source data* to meet information requirements.
- Coordinating *schedules* of team members and process owners and the necessary follow-on meetings.
- Dealing with competing *priorities* and trying to keep to the project timeline.



Questions...



Thank you!

