

CPATA Strategic Framework 2023–2025

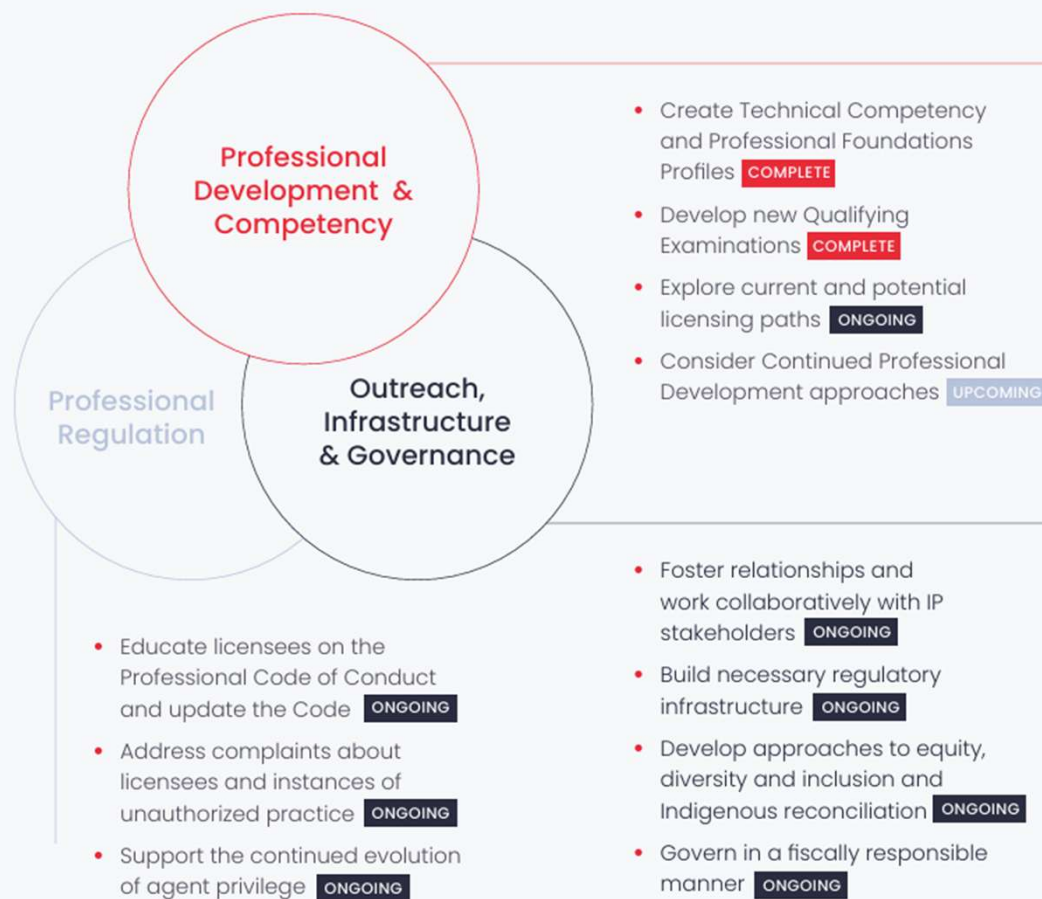
Accomplishments

CPATA's Strategic Framework 2023–2025

1. Organizational and Regulatory Infrastructure
2. Professional Development and Competency
3. Professional Regulation
4. Relationships and Communications
5. Governance, including fiscal responsibility



2023–2025 Strategic Framework



Organizational and Regulatory Infrastructure: Strengthening the CPATA Team

- Building the team: Full time CEO (2023), in-source CFO function, fractional GC PR
- All-staff training to enhance expertise
 - Lunch and learns
 - CNAR Conference (Ottawa 2024)
- Job evaluation and compensation review (2023)
- Launched Performance Excellence Program



Organizational and Regulatory Infrastructure: Infrastructure

- New CPATA online platform
- Enhanced Licensee Portal
- Improved Public Register with enhanced search functionality
- Application portal launched (2024)
- New Annual Licensee Report to have better data and continue to make consumer friendly improvements to public register (2025)
- Streamlined online complaints processing (2025)



Organizational and Regulatory Infrastructure: Compliance, Regulatory and ERM

- All federal requirements met
 - o Annual Reports submitted and tabled in Parliament
 - o Access to Information Act and Privacy Act reports submitted and tabled in Parliament
 - o Official Languages Act: Services in English and French; active offer principles across the organization; ongoing OLA training
- Enterprise risk and emergency preparedness frameworks developed and subject to continuous improvement



Professional Development and Competency: Professional Foundations Competency Profiles

CPATA's work on professional competency and entry-to-practice has focused on four pillars:



1. Addressing Barriers to Entry for Internationally-Trained IP Professionals



2. Establishing Technical and Professional Competency Profiles



3. Launching new Qualifying Examinations



4. Exploring pathways to becoming an agent

Professional Development and Competency Fairness and Barriers to Entry

- CPATA policies for internationally trained applicants
- Fairness review of exam processes
- Conducted self assessment of fair registration practices and implemented changes to registration policies, applications and website content
- Continuous improvement and learning



Professional Development and Competency: Technical Competency Profiles and Professional Foundations Competency Profile

Developed with the professions

Technical Competencies Profile for Patent Agents and
Trademark Agents (2024)

Professional Foundations Competency Profile (2025)



Professional Development and Competency: New Qualifying Exams

- Fair, defensible, transparent exams that adhere to approved test specifications that based off of the competency profiles, and which reflect best practices in development and standard setting
- Developed with assistance from >100 licensees
- English and French for both patent agent and trademark agent exams
- Online administration
- Knowledge exams 2X per year; Skills exams 1X per year for both trademark agents and patent agents



Professional Development and Competency: Pathways to Licensure Consultation

- 2024: Consultation featuring 11 focus groups with 47 participants, 2 roundtable sessions at IPIC Conference, 136 completed surveys and three written submissions
- 2025: Key findings include that:
 - The greatest barrier is an inability to secure a supervised practice opportunity.
 - The lack of structured training requirements poses difficulties for both trainees and supervisors; guidance from CPATA is desired by all.
 - The professions largely view the supervised practice model as vital.



Professional Development and Competency: NEXT STEPS: Pathways to Licensure

- Updated the Public Register to support securing a training supervisor (June 2025)
- Revised eligibility criteria for attempting the knowledge exams (June 2025)
- Developing supervised practice training resources to support supervisors and trainees (November 2025 – January 2027)
- Continuing to explore alternative pathways to licensure

Professional Regulation: Code of Conduct

- Proactive engagement:
 - Respond to ethics inquiries, agent conduct inquiries and complaints;
 - Ethics resources:
 - Continuing to release articles;
 - Searchable ethics article webpage
 - New Code of Conduct video series (released 2025)

NOTE: Premature to consider Rule amendments; will be required over time



Professional Regulation: Investigations, Complaints, Discipline and UAP

- Investigations
 - Proactive, principled and proportionate, with agent conduct inquiry process for early resolution where possible
 - First investigations undertaken in both English and French
 - Investigations ongoing
- Discipline: First Investigations Committee interim suspensions; first Discipline Committee hearings
- Unauthorized Practice (UAP):
 - Robust response to cyber fraud;
 - Addressing first UAPs related to misleading marketing / scope issues
- First judicial review of CPATA decision upheld by Federal Court

By the Numbers – Complaints and Discipline

	2021	2022	2023	2024	2025
Ethics Inquiries	4	29	30	24	28
Agent Conduct Inquiries	1	12	12	8	25
Conduct Complaints	7	3	5	5	6
Discipline Hearings	0	0	1	3	1
Unauthorized Practice Complaints	0	1	8	190	>200

Professional Regulation: Patent Agent and Trademark Agent Privilege

- Engagement with Minister's office, ISED staff, other regulators, IPIC to support the continued evolution of patent agent and trademark agent privilege
- Federal budget includes support for enhancing legal infrastructure for IP Innovation



Professional Regulation: Professional Liability Insurance (PLI)

- Background:
 - 2020: Axxima report
 - 2021: CPATA consultation re: appropriate insurance requirements; Board approves PLI requirements
 - 2022: Mandatory PLI requirement comes into force; double insurance for lawyer-agents in all provinces except BC and QC
 - Summer 2023: CLIA expands insurance to meet CPATA requirements – double insurance now only in ON and Alta
 - Fall 2024: LAWPRO program for 2025 approved to include \$2,000 optional policy to meet CPATA requirements
- Continue to monitor access to coverage



Relationships and Communications: Strengthening Licensee Engagement

Significant licensee outreach including:

- Licensee engagement: 1:1; newsletter, webinars, webcast Board meetings
- Consultations – Insurance, public interest regulation, competency profiles, pathways to licensure, annual licensee report and demographic survey
- CEO and Director outreach through firms and webinar series
- APRAM presentation on due care (French; 2025)
- IPIC: Working relationships and engagement through IPIC Conference, meeting with solo and small firm community of practice



Relationships and Communications: Building Government Relationships

- CIPO in person day
- CPATA showcased in CIPO podcast
- Engagement on apprenticeships, operations, IP trends
- Regular meetings with ISED and CIPO staff



Relationships and Communications: Expanded Engagement with Canadian IP Ecosystem Participants

- Outreach for pathways
- Attend IAC, IPON conferences on IP system issues such as IP education and IP strategy, systems change
- Engagement with IPON and other IP system participants re:
 - Role of patent agents and trademark agents;
 - Use of CPATA register / how to find competent patent agents and trademark agents



Relationships and Communications: Engagement with Regulators

- IP regulators (international): Engagement with USPTO, England and Wales (IPReg) Australia, New Zealand, Singapore
- Law societies: Engagement with several law societies, certain legal academics / law schools
- Engineers: Engineers Canada, PEO



Relationships and Communications: Leadership in Professional Regulation

- CEO and Deputy Registrar raising CPATA's profile through engagements at Canadian Network of Agencies for Regulation (CNAR – 2023, 2024, 2025), CEO outreach at Law Society of Ontario (2024, 2025), Professional Engineers Ontario (2024), College of Immigration and Citizenship Consultants (2025)



CEO and Registrar Juda Strawczynski, presented on and answered questions about CPATA's continuing development at the Intellectual Property Institute of Canada (IPIC)'s annual conference.



CPATA's Director of Registration and Education, Deputy Registrar Jen Slabodkin, presented at the Canadian Network of Agencies for Regulation, sharing insights into building a modern right-touch regulator.

Governance

1. By-law amendments to streamline governance and right-size fees for scale-up and building of reserves
2. Governance policies revised and streamlined
3. Election processes managed effectively including use of independent Election Commissioner as may be required
4. Committee recruitment and appointments processes running smoothly
5. Board and Committee meeting cycles running smoothly
6. Continuing Director and staff training including launch of Director education resource portal
7. Director conflicts register developed
8. Director and Board self evaluation processes developed
9. Committee self evaluation surveys developed and to be administered for the first time in 2026
10. CEO Evaluation processes in place

Fiscal Responsibility

- By-law changes introduced to enable fee increases to build operations and reserve funds in order to meet CPATA's regulatory mandate (2023)
- New fees enable CPATA to build reserves for longer term sustainability
- Government of Canada released as guarantor of CPATA line of credit (2025)
- Budgets being responsibly developed and conservatively managed
- Staff, Audit & Risk Committee and Board developing longer term financial planning
- CPATA will be consulting in 2026 for fee changes in 2027 (subject to By-law amendments)



CPATA's Milestones

2021

June

CPATA begins its operations.

July

All patent agents and trademark agents are subject to a Code of Professional Conduct.

Prior Experience Assessment Policy improves access to the professions for internationally-trained IP practitioners.

2022

CPATA addresses first cases of unauthorized practice.

2023

March

Board adopts the Technical Competency Profiles for Patent Agents and Trademark Agents.

June

Board approves CPATA's first Strategic Framework (2023-2025).

Fall

Discipline Committee holds its first public hearing.

2024

January

All licensees serving the public are required to have professional liability insurance.

March

The new Qualifying Examinations are launched.

Fall

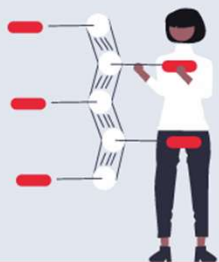
CPATA undertakes a consultation on apprenticeships.

2025

Initial Financial Reserves are established.

March

Board adopts the Professional Foundations Competency Profile.



Onward!

- Strategic Plan 2026–2028
- June 2026: 5 years since coming into force





Juda Strawczynski (He/Him) • You

CEO and Registrar, CPATA (College of Patent Agents & Trademark Agents)

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So proud of this team.

[#Team CPATA - CABAMC](#) [#ProfessionalRegulation](#) Canadian Network of Agencies for Regulation (CNAR)



CPATA - CABAMC

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Professional regulation is fast-evolving with advances in technology, changes in professional service landscapes and a shifting understanding of the responsibility of regulators in supporting cultural safety. [#CPATA](#) staff participated in [Canadian Network of Agencies for Regulation \(CNAR\)](#)'s conference this week to both gain and share important learnings.

La réglementation professionnelle évolue rapidement avec les progrès technologiques, les changements dans l'ensemble des services professionnels et une compréhension changeante de la responsabilité des organismes réglementaires à soutenir la sécurité culturelle. Le personnel du [#CABAMC](#) a participé à la conférence du Réseau canadien des organismes de réglementation cette semaine pour acquérir et partager des apprentissages importants.

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 Andrew Currier and 28 others

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Thank you and questions