INTA COMMITTEE MANAGEMENT TOOLKIT
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Please consult with your INTA Staff Liaison if you have any questions.
Mission Statement

The International Trademark Association (INTA) is a global association of brand owners and professionals dedicated to supporting trademarks and related intellectual property (IP) to foster consumer trust, economic growth, and innovation.

Strategic Directions

As a not-for-profit association, INTA’s role is to serve its members and society as a trusted and influential advocate for the economic and social value of brands. To fulfill this role, INTA will focus on the following strategic directions:

I. Promote the Value of Trademarks and Brands

Trademarks and related IP rights are indicators of the origin and the quality of goods and services. As such, they constitute the anchor of brands. Brands encompass the vision that drives companies’ strategies, their culture, and their offerings to consumers and society. Brands are vessels of trust, marketing tools, and financial assets.

Protection of trademarks and related IP — Companies and consumers need strong laws, efficient registration and protection mechanisms, and well-trained and equipped IP Offices and registries. Consistency, predictability and cost efficient registration procedures remain a priority for INTA members. INTA will strengthen its interaction with the legislative authorities, advocating for stronger laws, as well as providing support to executive offices and registries in order to provide companies and consumers with a strong framework for trademark and related IP rights protection.

Harmonization of laws and convergence of practices — INTA will continue supporting international treaties as well as other forms of legislation, regulation, and harmonization of rules and practices allowing easier and better access to trademark and IP rights protection. INTA will be a facilitator of best practices as well as a platform for exchange of ideas and solutions to ensure a more consistent and certain legal environment.

Enforcement — Strong laws and efficient registration systems without proper enforcement mechanisms are useless. Globalization, the advancement of social media, mobile media, the internet of things, as well as multi-media channels are both an opportunity and a challenge for companies and consumers. Off- and online counterfeiting continue to be a highly profitable business that directly affects consumer safety and impacts GDP, employment and social welfare. INTA will vigorously advocate for effective enforcement mechanisms. INTA will be at the forefront of the counterfeit battle by engaging legislators, the judiciary, customs authorities, law enforcement and investigators. INTA will continue engaging courts by means of amicus filings and through education and communication on the value of brands for companies, consumers, and society at large.

Business value of brands — Brands determine the people companies recruit, the products and services they put onto the market, the messages they convey to their customers, and the channels they use. To become part of this holistic approach to brands, trademark and IP professionals should understand and advance the value of brands, as well as their potential as communication, marketing and financial assets. INTA will provide its members with the tools to demonstrate the value of brands and how the work they do impacts brand value.
II. Reinforce Consumer Trust
Consumers continue relying on the brands they trust. However, the relationship between brands and consumers has evolved. Brands have become a product of their environment. INTA will continue to demonstrate that brands serve the interests of brand owners, consumers, and society at large.

Reinforce trademarks as sources of information and brands as promises of delivery — INTA will monitor legislative trends and initiatives that threaten brand owner property rights and the ability of consumers to make informed purchasing decisions, such as standardized or plain packaging, and will advocate for a safer Internet for consumers. INTA will engage consumer organizations to jointly promote the importance of brands for consumer information and safety.

Communicate the contribution of brands to economies and society — Through economic studies and multiple communication methods, INTA will promote the positive side of IP, namely its contribution to GDP, employment and social welfare around the world. INTA will intensify its communication to non-IP media to contribute to a better appreciation by the public of IP rights. Considering that many economies rely on small and medium-sized enterprises (SMEs) and entrepreneurs, INTA will reinforce its SME and entrepreneur membership and highlight the importance of brand protection regardless of the size of businesses.

Brand equity — Companies or individuals own their trademarks and related IP. Consumers influence, in more ways than ever before, how a brand and its equity evolve. INTA will build bridges with consumer associations, professional organizations, and academia to be part of the brand equity conversation.

III. Embrace Innovation and Change
Innovation inspires. Companies and consumers are embracing innovation at a faster pace than ever before. Consumer values and needs are also evolving. INTA will monitor change and innovation, assess its impact on brands, and provide support and value to its members.

Evaluate changes as a result of technology, innovation, and evolving consumer needs and values — Through its different committees and task forces, INTA will analyze changes, study the correlations between brands and innovation, and assess potential impacts for brand owners. INTA will be a platform for thought leadership on change and how members can take advantage of opportunities and avoid challenges brought about by innovation and change.

Educate members on the impact of innovation, technology, and change on brands — Through education, resources, and communication, INTA will continue to be a forum of discussion and knowledge sharing for its members. This will further allow INTA to produce opinions or recommendations on existing and future trademark and IP rights-related issues affecting both companies and consumers.

Provide innovative, valuable services to members — Innovation and technology are also impacting associations. INTA will take advantage of innovation and technology, identifying trends and opportunities to provide enhanced services to its members, both at organizational and individual levels.

INTA will follow these strategic directions through global advocacy, communication, education and networking opportunities via its offices in New York, Washington, DC, Brussels, Santiago, Chile, Shanghai, Singapore, its representatives in Geneva, New Delhi, and its membership in more than 200 countries. INTA will continue expanding its membership and presence to serve all of its members globally.
# 2020–2021 INTA Committee Structure

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<td>Alternative Dispute Resolution Committee</td>
<td>Building Bridges Committee</td>
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<td>Copyright Committee</td>
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<td>Trademark Administrators Committee</td>
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<td>The Trademark Reporter Committee</td>
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<td>Legislation and Regulation Committee</td>
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<td>Non-Traditional Marks Committee</td>
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<td>Parallel Imports Committee</td>
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<td>Advocacy Group Committees</td>
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<tr>
<td><strong>Anticounterfeiting Committee</strong></td>
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<tr>
<td>Develops and advocates the Association’s policy regarding anticounterfeiting and enforcement issues. The committee will monitor developments in treaties, legislation, regulations and other enforcement mechanisms in various jurisdictions, complete analyses and propose policy recommendations to the Board. Work includes report and submission writing, interaction with anticomterfeiting organizations and advocacy in conjunction with relevant INTA committees and staff.</td>
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<tr>
<td><strong>Brand Restrictions Committee</strong></td>
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<tr>
<td>Develops and advocates the Association’s policy regarding the impact of brand restrictions on trademark and related rights. The Committee will monitor developments in treaties, legislation, and regulations in various jurisdictions, complete analyses, and coordinate advocacy activities with other relevant INTA committees such as the Legislation &amp; Regulation Committee. If necessary, the Committee also will propose policy recommendations to the Board. Work includes report and submission writing and advocacy in conjunction with INTA’s staff, as well as raising awareness on brand restriction issues among INTA membership via Bulletin articles and the public through op-ed articles and other public relations methods, and policy dialogues and conferences.</td>
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<tr>
<td><strong>Copyright Committee</strong></td>
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<tr>
<td>Develops and advocates the Association’s policy regarding the impact of copyright law and enforcement on trademark rights. The committee will monitor copyright cases, legislation and regulation in various jurisdictions, complete analyses and propose policy recommendations to the Board. Work includes report and submission writing, interaction with copyright organizations and advocacy in conjunction with relevant INTA committees and staff.</td>
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<td><strong>Data Protection Committee</strong></td>
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<tr>
<td>Develops and advocates the Association’s policy regarding the impact of data protection law on trademark rights. The committee will monitor data protection cases, legislation and regulation in various jurisdictions, complete analyses and propose policy recommendations to the Board. Work includes report and submission writing, interaction with data protection organizations and advocacy in conjunction with relevant INTA committees and staff.</td>
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<td><strong>Designs Committee</strong></td>
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<td>Develops and advocates the Association’s policy related to designs. The committee monitors design cases, legislation and practice in various jurisdictions, including on the international, regional and national levels; completes analyses; and proposes policy recommendations to the Board. Work includes report and submission writing, interaction with government officials and design organizations, and advocacy in conjunction with relevant INTA committees and staff, as well as raising awareness on design-related issues among INTA membership.</td>
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<td><strong>Emerging Issues Committee</strong></td>
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<tr>
<td>Identifies and advocates the Association’s policy regarding important trends and emerging issues related to trademarks and not covered by other “issue” committees. The committee will propose policy recommendations to the Board. Work includes report and submission writing, and advocacy in conjunction with relevant INTA committees and staff.</td>
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<tr>
<td><strong>Enforcement Committee</strong></td>
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<tr>
<td>Develops and advocates the Association’s policy regarding the timely and effective enforcement of trademarks. The committee will monitor cases, legislation and regulation in various jurisdictions, complete analyses and propose policy recommendations to the Board. Work includes report and submission writing, and advocacy in conjunction with relevant INTA committees and staff.</td>
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<td>Committee</td>
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<tr>
<td>Famous and Well-Known Marks Committee</td>
<td>Develops and advocates the Association’s policy regarding the balanced protection of famous and well-known marks. The committee will monitor developments in treaties, cases, legislation and regulation in various jurisdictions, complete analyses and propose policy recommendations to the Board. Work includes report and submission writing, and advocacy in conjunction with relevant INTA committees and staff.</td>
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<tr>
<td>Geographical Indications Committee</td>
<td>Develops and advocates the Association’s policy related to geographical indications, in particular their relationship with trademark rights. The committee will monitor developments in treaties, legislation and practice on the international, regional and national levels; complete analyses; and propose policy recommendations to the Board. Work includes report and submission writing, interaction with government officials, geographical indications organizations and advocacy in conjunction with relevant INTA committees and staff.</td>
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<tr>
<td>Harmonization of Trademark Law and Practice Committee</td>
<td>Evaluates efforts on national, regional and international levels through treaties, trade agreements, special conventions and other nonbinding instruments that relate to trademark law and practice. The committee will complete analyses and propose policy recommendations to the Board. Work includes drafting proposed treaty language and advocating INTA’s existing policy positions to relevant government officials.</td>
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<tr>
<td>Indigenous Rights Committee</td>
<td>Develops and advocates the Association’s policy regarding the impact of indigenous rights and their enforcement on trademark rights. The committee will monitor developments in treaties, legislation and implementation in various jurisdictions, complete analyses and propose policy recommendations to the Board. Work includes report and submission writing, interaction with indigenous rights organizations and advocacy in conjunction with relevant INTA committees and staff.</td>
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<tr>
<td>International Amicus Committee</td>
<td>Provides expertise concerning trademark and other IP-related laws to courts and trademark offices around the world through the submission of amicus curiae (“friend of the court”) briefs or similar filings. Work includes advocating for acceptance of amicus briefs, evaluation of requests to file, monitoring leading cases, and drafting of submissions, often on a tight deadline.</td>
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<tr>
<td>Internet Committee</td>
<td>Develops and advocates the Association’s policy regarding the balanced protection of trademarks on the Internet. The committee will focus primarily on policy development and compliance issues at the Internet Corporation of Assigned Names and Numbers (ICANN) with regard to use of trademarks in the domain name system. This includes active and vocal participation in working groups and drafting of public comments. In addition to ICANN policy, the committee will monitor developments in other global internet governance initiatives, social media, mobile applications and other technical platforms and provide subject matter expertise to relevant INTA committees and staff. Work includes proposing policy recommendations to the Board, report and submission writing, project development and advocacy as required.</td>
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</tr>
<tr>
<td>Legislation and Regulation Committee</td>
<td>Analyzes legislative and regulatory developments and identifies deficiencies in existing laws and regulations relating to trademarks and unfair competition. The committee will complete analyses and propose policy recommendations to the Board. Work includes drafting proposed legislation and/or regulations and advocating INTA’s existing policy positions to relevant government officials.</td>
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## Advocacy Group Committees (continued)

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<tr>
<th>Committee Name</th>
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<tr>
<td>Non-Traditional Marks Committee</td>
<td>Develops and advocates the Association’s policy regarding the balanced protection of nontraditional trademarks (e.g., sound, color, trade dress). The committee will monitor developments in treaties, cases, legislation and regulation in various jurisdictions, complete analyses and propose policy recommendations to the Board. Work includes report and submission writing, and advocacy in conjunction with relevant INTA committees and staff.</td>
</tr>
<tr>
<td>Parallel Imports Committee</td>
<td>Develops and advocates the Association’s policy regarding the balanced protection against parallel imports. The committee will monitor developments in treaties, cases, legislation and regulation in various jurisdictions, complete analyses and propose policy recommendations to the Board. Work includes report and submission writing, and advocacy in conjunction with relevant INTA committees and staff.</td>
</tr>
<tr>
<td>Right of Publicity Committee</td>
<td>Develops and advocates the Association’s policy regarding the right of publicity. The committee will monitor developments in treaties, case law, legislation and implementation in various jurisdictions, complete analyses and propose policy recommendations to the Board. Work includes report and submission writing, interaction with right of publicity organizations and advocacy in conjunction with relevant INTA committees and staff.</td>
</tr>
<tr>
<td>Trademark Office Practices Committee</td>
<td>Evaluates and recommends improvements to trademark office practices, procedures, operations and regulations at the national, regional and international levels. The Committee monitors trademark office developments in various jurisdictions, including participation in user groups, completes analyses, and prepares comments and submissions within INTA’s policy framework. Work includes comment writing and advocacy in conjunction with relevant INTA committees and staff. The Committee consists of regional and country-specific subcommittees along with those with an international focus such as the Madrid System and TM5 subcommittees. Some subcommittees, such as EUIPO and USPTO, also participate in Office-led projects, meetings, seminars and conferences. The Committee also develops educational programs and seminars specifically designed for trademark office in the trademark arena and which also may be industry specific.</td>
</tr>
<tr>
<td>Unfair Competition Committee</td>
<td>Develops and advocates the Association’s policy regarding unfair competition law. The committee will monitor developments in treaties, case law, legislation and implementation in various jurisdictions, complete analysis and propose policy recommendations to the Board. Work includes report and submission writing, interaction with related organizations and advocacy in conjunction with relevant INTA committees and staff.</td>
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### Communications Group Committees

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<th>Committee</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Brands for a Better Society Committee</strong></td>
<td>Demonstrates how brands positively impact society and build consumer trust through corporate social responsibility, diversity and inclusion, and pro bono initiatives by increasing awareness among members of the value of these activities, engaging targeted stakeholders, and informing the public about efforts undertaken by INTA and its members. The Committee will monitor trends in the industry and among members to develop best practices and tools to raise awareness and implement relevant programs.</td>
</tr>
<tr>
<td><strong>Building Bridges Committee</strong></td>
<td>Aims to build bridges with non-IP and non-legal associations (not-for-profit associations), focusing specifically on five segments: Marketing and Advertising associations, Consumers associations, Manufacturing and Retail associations, associations that develop and promote sustainability and ethical standards, and associations that represent SME’s and entrepreneurs. The Committee will identify and review bridge-building opportunities to help the Association create sustainable and positive relationships, promote the value of trademarks and brands, and to facilitate the advancement of INTA’s Strategic Plan. Please note that this Committee is not divided by regions.</td>
</tr>
<tr>
<td><strong>Public Information Committee</strong></td>
<td>Creates and maintains material on INTA’s website that teaches the general public about trademarks and brands. Committee members research, write, edit and update basic online information and reference materials, including FAQs, slide presentations and informational guides. The committee additionally brainstorms and implements new ways of presenting information to target public audiences including educational institutions, small business owners, marketing experts, policy makers, designers, and the media. Each committee member is expected to participate in monthly subcommittee calls, as well as meet twice a year at the Annual and Leadership Meetings, to contribute to idea development, creation, maintenance and dissemination of public resources.</td>
</tr>
<tr>
<td><strong>Unreal Campaign Committee</strong></td>
<td>The Unreal Campaign is INTA’s consumer awareness initiative that educates teenagers about the importance of trademarks and brands and the dangers of purchasing counterfeit goods. Committee members will be responsible for organizing student presentations in their respective regions. This includes contacting, planning and teaching the Unreal Campaign program at their local schools. Currently, student presentations are available in six languages: Afrikaans, English, French, Italian, Portuguese, and Spanish. Volunteers for this committee should be prepared for an active experience engaging with young consumers and may expect to spend several hours each year onsite at schools or other youth-oriented events.</td>
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## 2020—2021 INTA Committee Descriptions

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<tr>
<th>Resources Group Committees</th>
<th>Committee Description</th>
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<tbody>
<tr>
<td><strong>Academic Committee</strong></td>
<td>Develops member benefits, services and programs specifically designed for law students and professors. Work includes content development, identification of speakers and moderators, support with course materials development and review, and program implementation. Current offerings include: the Course on International Trademark Law and Practice; Adjunct Professor Panel; Academic Series/Career Development Day at the Annual Meeting, Career Panels and other programming designed specifically for the academic community.</td>
</tr>
<tr>
<td><strong>Alternative Dispute Resolution Committee</strong></td>
<td>Promotes the worldwide use of Alternative Dispute Resolution (ADR), including use of the Panel of Trademark Mediators, as a cost-effective method of resolving trademark disputes, and develops ADR programming and services. Work includes program content development, identification of speakers and moderators, support with course materials development and review, program implementation, partnership opportunities and outreach to courts and bar associations to educate and raise mediation awareness. Current offerings include: ADR Roundtables and Webcasts, Mediation Live! Session, Table Topics at Annual Meeting, letter writing campaigns and surveys.</td>
</tr>
<tr>
<td><strong>Brands and Innovation Committee</strong></td>
<td>Focuses on defining and advancing INTA’s agenda with respect to the interrelationship between brands and innovation. This interrelationship will generate increasingly frequent and complex issues for brand owners. INTA will address these issues through educational events, written content and strategic relationships with non-legal and non-IP (not-for-profit) technology-based associations. This Committee is not divided by regional subcommittees.</td>
</tr>
<tr>
<td><strong>Commercialization of Brands Committee</strong></td>
<td>Develops resources including educational programs and best practice guidelines relating to the in-market commercialization of brand offerings. This Committee will consider such issues as marketing and advertising regulatory issues, agreements including licenses, distribution, supply and agency agreements, tax, brand valuation, brand evaluation, and related issues to support the commercial success of product and service offerings.</td>
</tr>
<tr>
<td><strong>In-House Practitioners Committee</strong></td>
<td>Develops services and programs specifically designed for in-house trademark professionals, including nonprofit organizations. Work includes content development, identification of speakers and moderators, support with course materials development and review, and program implementation. Current offerings include: Annual In-House Practitioners Workshop, “Idea Exchanges” both in-person and via teleconferences, e-Learning, and programming for nonprofit organizations. Develop proposals for member benefits specifically designed for in-house trademark professionals such as online resources, checklists and other resources to assist in brand management and career development.</td>
</tr>
<tr>
<td><strong>INTA Bulletins Committee</strong></td>
<td>Produces a substantial portion of the content for the <em>INTA Bulletin</em> and <em>China Bulletin</em>. Committee members on the 7 INTA Bulletin-focused subcommittees (Association News, Features, and 5 regional Law &amp; Practice subcommittees) research, write and verify the accuracy of articles on Association news and policy, and trademark law and practice. <em>China Bulletin</em> subcommittee members translate materials from English into Chinese and vice versa in addition to writing original articles. The committee conducts most of its business by email with a limited number of conference calls.</td>
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<td>Committee Name</td>
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<td><strong>Law Firm Committee</strong></td>
<td>Develops member benefits, services, education programs specifically designed for law firms and guidelines for the committee members to serve as ambassadors for new law firm associate members that join INTA. Work includes content development, identification of speakers and moderators, support with course materials development and review, and program implementation. Current offerings include: Pre–Annual Meeting Receptions; Legal Services Delivery Podcasts; Webcasts and Session Development; Professional Development; Technology Relevant to Law Firm Practitioners.</td>
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<tr>
<td><strong>Leadership Development Committee</strong></td>
<td>Develops educational programs specifically designed for the professional growth and development of INTA volunteers. Work includes content development, identification of speakers and moderators, support with course materials development and review, and program implementation. Current offerings include: Leadership Training Content Development (at Annual and Leadership Meetings), e-Learning (podcasts, video series, free webinars), and Professional Development programming.</td>
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<tr>
<td><strong>Publications Committee</strong></td>
<td>Identifies, evaluates, and develops concepts and proposals for members-only online resources. Oversees efforts of project teams of contributing editors and writers who develop and produce content. Researches and makes recommendations on new formats. Develops and produces short-form publications such as checklists, fact sheets, industry and topic papers, the glossary, and other resources. Liaises with other committees in the Resources and Advocacy Groups, and with the Programming Advisory Council, in coordinating the release of new or updated resources in conjunction with advocacy initiatives and events.</td>
</tr>
<tr>
<td><strong>The Trademark Reporter Committee</strong></td>
<td>The Trademark Reporter Committee produces The Trademark Reporter (TMR), which has delivered cutting-edge, peer-reviewed legal scholarship on trademarks, brands, and related areas of intellectual property to practitioners, academics, and courts in the United States and around the globe since 1911. The TMR Committee solicits, writes, and edits scholarly articles, commentaries, and book reviews.</td>
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<tr>
<td><strong>Trademark Administrators Committee</strong></td>
<td>Develops educational and professional development programs and resources specifically designed for non-attorney trademark professionals, like paralegals, managers, and trademark administrators (TMAs). Work includes content development, program implementation, and identification of speakers and moderators. Current offerings include: TMA Brunch at Annual Meeting; International TMAs Mini-Seminars, Special Programs for Super Experienced TMAs, TMA Resources &amp; Tools; TMA Networking &amp; Outreach, TMA Mentoring, TMA Communications &amp; Social Media, and Liaising with the Project Teams for the TMAP Meeting and TMA Roundtables.</td>
</tr>
<tr>
<td><strong>Young Practitioners Committee</strong></td>
<td>Develops services and programs specifically designed for young practitioners. Work includes content development, identification of speakers and moderators, support with course materials development and review, and program implementation. Current offerings include: Annual Meeting Orientation and Reception; Young Practitioner Receptions throughout the year; Young Practitioner Webcasts; and the Tomorrow’s Leaders Award.</td>
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Expectations
INTA Committee Chairs and Vice Chairs

General

The following general criteria apply to all nominees for INTA leadership positions, including Officers, INTA Board of Directors, Counsel, Committee Chairs and Vice Chairs. Nominees should:

- demonstrate a depth of knowledge in intellectual property (IP) law, with particular emphasis on trademark law;
- have been employed in the field or practice of IP law for a sufficient period of time to demonstrate appreciation of the issues facing the organization;
- demonstrate a commitment to the organization by regular meeting attendance, including the Annual Meeting and related activities or official functions, Leadership Meeting, Board meetings and related government relations programs and committee meetings; and
- complete substantive tasks in a timely manner with high quality work product.

In addition, nominees for these leadership positions should expect to devote substantial time to their INTA leadership responsibilities and bear their travel expenses to INTA meetings and to other scheduled events.

Before an individual accepts a nomination for a leadership position, he or she should discuss the benefits, responsibilities and resource requirements with his or her company or firm management and acquire approval to actively and fully participate in INTA in a senior leadership role.

Committees

In accordance with INTA’s Bylaws, the Board of Directors may create, continue or discontinue committees from time to time and establish the policies, procedures and responsibilities for those committees.

Committees are established to make policy recommendations to the Board of Directors, undertake short and long term assignments to execute the Strategic Plan and generally to carry out the work of the Association. Committees represent, involve and serve the Association’s members and provide an important training ground for INTA’s future leaders. Committees may not express opinions or represent positions in the name of the Association unless specifically authorized by the Board of Directors.

As an INTA committee member, you may, in the fulfillment of your committee responsibilities, participate in the preparation of original written materials including reports, articles, papers,
briefs, fact sheets, checklists, or others. As a leader in the intellectual property field, INTA takes seriously its responsibility to provide accurate and authoritative materials for use by its members and/or the public, as well as by relevant courts and tribunals. INTA also takes seriously its responsibility to honor intellectual property rights; therefore, it is expected that all committee-generated work will properly acknowledge and provide accurate attribution for all source information or material.

**General Responsibilities – Committee Chairs and Vice Chairs**

While participating as part of a committee, Committee Chairs and Vice Chairs must:

- believe in and actively support the mission of the Association;
- attend the Annual Meeting and related activities or official functions, the Leadership Meeting and committee meetings;
- comply with applicable laws, regulations, bylaws and policies;
- direct and oversee the committee’s activities;
- ensure timely communications within the committee and among other committees and staff;
- share insights to help the committee make appropriate decisions and policy;
- with the staff liaison, develop the committee’s mission and objectives;
- participate in the annual nominations process, identifying and nominating individuals to serve in leadership positions (e.g., as Officers, Counsel, Directors, Committee Chairs and Vice Chairs);
- prepare well for all meetings;
- with the staff liaison, maintain records and relevant information on committee work;
- annually, at the request of the Chief Executive Officer, evaluate the INTA Staff Liaisons responsible for the committee; and
- resign from the committee when no longer able to support the mission or devote the necessary time to be a productive committee leader; and

**Expectations – Committee Chairs and Vice Chairs**

INTA Committee Chairs and Vice Chairs can be expected to allot approximately 5 – 10 hours per month for regular meetings, conference calls and related committee activities. Committee Chairs and Vice Chairs are appointed for a two-year committee term.

Most committees meet monthly via conference call for at least an hour, but the frequency of the calls is dictated by the committee’s projects throughout the year. In addition, the committees meet in person during the INTA Annual Meeting and Leadership Meeting. During the two-year committee term, Committee Chairs and Vice Chairs are expected to attend the Annual and Leadership Meetings.
Committee Chairs and Vice Chairs should expect to spend approximately 1-3 hours preparing for each committee meeting, including time spent developing and reviewing the agenda and related materials distributed to each committee member prior to the committee meeting. Committee Chairs and Vice Chairs should be prepared to lead the discussion during the meeting and ask questions of the appropriate volunteers or staff to clarify issues or raise concerns.

Committee Chairs and Vice Chairs may be asked to present a report on their committee’s activities and accomplishments to the Board of Directors from time to time.

Committee Chairs and Vice Chairs have a general responsibility to promote INTA to professional colleagues, encouraging non-members to join the Association and to become active participants. They should generally inform the public and others about INTA and mention their affiliation, when appropriate, in press interviews, articles and speaking engagements.

Committee Chairs must adhere to conflict of interest, ethics and confidentiality policies as promulgated.
Expectations

INTA Subcommittee Chairs

General

The following general criteria apply to all nominees for INTA leadership positions, including Officers, INTA Board of Directors, Counsel, Committee Chairs and Vice Chairs and Subcommittee Chairs. Nominees should:

- demonstrate a depth of knowledge in intellectual property (IP) law, with particular emphasis on trademark law;
- have been employed in the field or practice of IP law for a sufficient period of time to demonstrate appreciation of the issues facing the organization;
- demonstrate a commitment to the organization by regular meeting attendance, including the Annual Meeting and related activities or official functions, Leadership Meeting, Board meetings and related government relations programs and committee meetings;
- complete substantive tasks in a timely manner with high quality work product.

In addition, nominees for these leadership positions should expect to devote substantial time to their INTA leadership responsibilities and bear their travel expenses to INTA meetings and to other scheduled events.

Before an individual accepts a nomination for a leadership position, he or she should discuss the benefits, responsibilities and resource requirements with company or firm management and acquire approval to actively and fully participate in INTA in a senior leadership role.

Committees

In accordance with INTA’s Bylaws, the Board of Directors may create, continue or discontinue committees from time to time and establish the policies, procedures and responsibilities for those committees.

Committees are established to make policy recommendations to the Board of Directors, undertake short and long term assignments to execute the Strategic Plan and generally to carry out the work of the Association. Committees represent, involve and serve the Association’s members and provide an important training ground for INTA’s future leaders. Committees may not express opinions or represent positions in the name of the Association unless specifically authorized by the Board of Directors.

As an INTA committee member, you may, in the fulfillment of your committee responsibilities, participate in the preparation of original written materials including reports, articles, papers, briefs, fact sheets, checklists, or others. As a leader in the intellectual property field, INTA takes
seriously its responsibility to provide accurate and authoritative materials for use by its members and/or the public, as well as by relevant courts and tribunals. INTA also takes seriously its responsibility to honor intellectual property rights; therefore, it is expected that all committee-generated work will properly acknowledge and provide accurate attribution for all source information or material.

**General Responsibilities – Subcommittee Chairs**

While participating as part of a subcommittee, Subcommittee Chairs should:

- believe in and actively support the mission of the Association;
- attend the Annual Meeting and related activities or official functions, the Leadership Meeting and committee meetings;
- comply with applicable laws, regulations, bylaws and policies;
- direct and oversee the subcommittee’s activities;
- ensure timely communications within the subcommittee and among other committees, subcommittees and staff;
- share insights to help the subcommittee make appropriate decisions and policy;
- with the staff liaison, develop the subcommittee’s mission and objectives;
- participate in the annual nominations process, identifying and nominating individuals to serve in leadership positions (e.g., as Officers, Counsel, Directors, Committee Chairs and Vice Chairs);
- prepare well for all meetings;
- with the staff liaison, maintain records and relevant information on subcommittee work; and
- resign from the subcommittee when no longer able to support the mission or devote the necessary time to be a productive subcommittee leader.

**Expectations – Individual Subcommittee Chairs**

INTA Subcommittee Chairs can be expected to allot approximately 2 – 5 hours per month for regular meetings and related subcommittee activities. Subcommittee Chairs are appointed for a two-year subcommittee term, although subcommittees may be sunset and/or restructured before that time if their missions have been accomplished. Subcommittees may also be formed, as necessary, throughout the two-year committee term.

Most subcommittees meet monthly via conference call for at least an hour, but the frequency of the calls is dictated by the subcommittee’s projects throughout the year. In addition, the subcommittees generally meet in person during the INTA Annual Meeting and Leadership Meeting. During the two-year committee term, Subcommittee Chairs are expected to attend the Annual and Leadership Meetings.

Subcommittee Chairs should expect to spend approximately 1 hour preparing for each subcommittee meeting, including time spent developing and reviewing the agenda and related materials distributed to each subcommittee member prior to the subcommittee meeting.
Subcommittee Chairs should be prepared to lead the discussion during the meeting and ask questions of the appropriate volunteers or staff to clarify issues or raise concerns.

Subcommittee Chairs may be asked to present a report on their subcommittee’s activities and accomplishments to the Board of Directors from time to time.

Subcommittee Chairs have a general responsibility to promote INTA to professional colleagues, encouraging non-members to join the Association and to become active participants. They should generally inform the public and others about INTA and mention their affiliation, when appropriate, in press interviews, articles and speaking engagements.

Subcommittee Chairs must adhere to conflict of interest, ethics and confidentiality policies, as promulgated.
INTA Committee Policy

In accordance with INTA’s Bylaws, the Board of Directors may create, continue or discontinue committees from time to time and establish the policies, procedures and responsibilities for those committees.

Committees are established to make policy recommendations to the Board of Directors, undertake short-term and long-term assignments to execute the Strategic Plan and generally to carry out the work of the Association. Committees may not express opinions or represent positions in the name of the Association unless specifically authorized by the Board of Directors. Committees represent, involve and serve the Association’s members and provide an important training ground for INTA’s future leaders.

As an INTA committee member, you may, in the fulfillment of your committee responsibilities, participate in the preparation of original written materials including reports, articles, papers, briefs, fact sheets, checklists, or others. As a leader in the intellectual property field, INTA takes seriously its responsibility to provide accurate and authoritative materials for use by its members and/or the public, as well as by relevant courts and tribunals. INTA also takes seriously its responsibility to honor intellectual property rights; therefore, it is expected that all committee-generated work will properly acknowledge and provide accurate attribution for all source information or material.

General Information – Committee Members

Committee volunteers are appointed for a two-year committee term. Committee members may serve on the same committee for two consecutive terms (four years total). They may then apply to serve on a different committee, if they so choose.

Committee volunteers should expect to devote an appropriate amount of time to their INTA committee responsibilities. Time commitments may vary depending on the committee. The INTA staff liaison will have further information about time commitments for specific committees.
Committee volunteers are responsible for their travel expenses to INTA meetings and to other scheduled events (as necessary).

Before an individual accepts a position on a committee, he or she should discuss the benefits, responsibilities and resource requirements with his or her company or firm management and acquire approval to actively and fully participate in INTA.

Most committees meet monthly via conference call for at least an hour, but the frequency of the calls is dictated by the committee’s projects throughout the year. In addition, the committees meet in person during the INTA Annual Meeting and Leadership Meeting. During the two-year committee term, committee members are expected to attend the Annual and Leadership Meetings.

**Responsibilities – Committee Members**

While participating on a committee, volunteers must:

- be employed by an INTA member company or firm, or have an Academic membership;
- demonstrate a commitment to the Association through regular meeting attendance, including committee conference calls and meetings at the Annual and Leadership Meetings;
- participate in the annual nominations process, identifying and nominating individuals to serve in leadership positions (e.g., as Officers, Counsel, Directors, Committee Chairs and Vice Chairs);
- complete assigned tasks in a timely manner, maintaining the high quality standards of the Association;
- support the mission of the Association;
- comply with applicable INTA regulations, bylaws and policies;
- respond to INTA staff and committee communications in a timely manner;
- share insights to help the committee make appropriate decisions and policy;
- be prepared for and actively participate in all committee meetings, including (but not limited to) taking minutes, when necessary; and
- resign from the committee when no longer able to support the committee mission or devote the necessary time to be a productive committee member.
Expectations
Staff Liaison

General

As much as possible, the experience of the members on a committee should be similar no matter who is assigned as the staff liaison. The staff liaison provides guidance and leadership on all aspects of the committee’s activities, including but not limited to, selecting committee members and requesting waivers for approval by the Board of Directors, setting objectives in support of the Strategic Plan and Implementation Plan, managing committee projects and reporting on committee work, and identifying future leaders of the committee and the Association. Staff liaisons and committee leaders form a partnership to advance the work of the committees to achieve the goals and objectives of the committee in support of the Strategic Plan.

With regard to the Committee Selection Process, staff liaisons play a direct role in selecting members for their respective committees. They also are responsible for recommending waivers for Board approval. It is crucial that the liaison is mindful of the following when selecting committee members:

- Balanced Corporate and Associate Member participation.
- Adequate regional representation.
- Subject matter expertise.
- Appropriate balance of new and returning members to ensure new perspectives and potential leaders.
- No committee assignment of members for whom waivers were requested without formal Board approval of the waiver list as proposed by the CEO.

Together with the committee leaders, the staff liaison participates in setting SMART objectives (SMART = Specific, Measurable, Attainable, Realistic, Time-bound) for the committee and its various subcommittees, project teams, etc., in alignment with the Strategic Plan, Implementation Plan, and any other priorities designated by the Board. Committee objectives will be reviewed and validated by the Planning Committee. Throughout the committee term, the staff liaison should be aware of the status of all projects of the committee and assist the committee leaders in ensuring timely progress is made in fulfillment of committee objectives.

In consultation with the committee leaders, the staff liaison should also provide input on the performance of committee members to determine future INTA leaders, candidates for committee leadership nominations, candidates for subcommittee chairs, and candidates for President’s and Volunteer Service Awards.
The staff liaison works with the committee leadership to maintain committee-related records and other relevant information to retain the “institutional memory” of their committees and of the Association as a whole. This is especially useful during periods of committee transition and also helps prevent committees from doing needlessly duplicative work. Until a formal document management system is implemented, committee files should be maintained in a shared drive to ensure accessibility by staff other than the liaison when necessary.

As an INTA staff liaison, you may, in the fulfillment of your committee responsibilities, participate in the preparation of original written materials including reports, articles, papers, briefs, fact sheets, checklists, or others. As a leader in the intellectual property field, INTA takes seriously its responsibility to provide accurate and authoritative materials for use by its members and/or the public, as well as by relevant courts and tribunals. INTA also takes seriously its responsibility to honor intellectual property rights; therefore, it is expected that all committee-generated work will properly acknowledge and provide accurate attribution for all source information or material.

**Specific Responsibilities – Staff Liaison**

In support of committee activities and in consultation with the committee leadership as appropriate, the staff liaison responsibilities are as follows:

- Actively support the mission and Strategic Plan of the Association.
- Ensure compliance with applicable INTA bylaws and policies.
- Work collaboratively with committee leadership and other staff to develop, execute and achieve the committee’s objectives in alignment with the Strategic Plan and in alignment with the work of other committees.
- Provide guidance for the committee’s activities.
- Share insights to help the committee make appropriate decisions and policy.
- Ensure that committee leadership take steps to achieve effective meetings, e.g., creating call schedules at the beginning of the term; setting meeting agendas; compiling minutes; and managing projects in a timely manner.
- Participate on monthly/bi-monthly/quarterly calls with committee leadership to maintain the momentum of committee work.
- When possible, attend the in-person meetings at the Annual and Leadership Meetings, especially those where the staff liaison is engaged in specific projects.
- Ensure the tools are in place for timely communications within the committee, such as updated rosters, distribution lists, conference call codes, etc.
- Proactively seek opportunities for communication between other staff, committees, Groups, GACs, departments, etc.
- Respond to committee inquiries within a reasonable timeframe.
- Ensure that the appropriate steps for approval of proposed online resources are taken, including the staff liaison’s independent assessment of proposed online resources.
- Participate in the annual nominations process, identifying and nominating individuals to serve in leadership positions (e.g., as Officers, Counsel, Directors, Committee Chairs and Vice Chairs).
- Maintain records and relevant information on committee work.
• Work with committee leadership to ensure a smooth transition of committee work and leaders from one term to the next.

Performance Review

Committee leadership will be asked to respond to a questionnaire on the staff liaison's performance. Part of the staff liaison's yearly performance evaluation will be based on this feedback.
2020 – 2021 Committee Objectives Drafting Guidelines

This document provides general guidelines for committee leadership and staff liaisons to draft your committee’s 2020 – 2021 objectives, which are due no later than December 6. All committee objectives will be reviewed by Etienne, Bruce (Advocacy Group Coordinator), Carol (Communications Group Coordinator) and Randi (Resources Group Coordinator), as well as the Planning Committee.

- Staff liaisons are responsible for sharing the 2020 – 2021 Committee Objectives template file with committee leadership and for uploading the final draft for review in the proper format:
  - Do not delete or hide any columns in the file. Do not change or delete any of the filters in the file.
  - Use gray shading for rows added to indicate overall committee objectives. Leave unshaded the rows added for subcommittee objectives. Your staff liaison can provide samples of last term’s objectives for reference.
  - List all subcommittee names exactly as they should be input into INTA’s member database. Please do not use abbreviations.
  - To use the drop down menu in the cells under the Deadline column, click within the cell and the drop down arrow will appear in the bottom right. You can make your selection from the options of: By mid-2020, By end-2020, By mid-2021, By end-2021. Please do not type your entry (to avoid misspellings) or add any other options because we will be using these three options to filter views.

- As a first step in drafting committee objectives, committee leadership and staff liaisons should review the 2018–2021 Strategic Plan, relevant parts of the Implementation Plan, and 2020 – 2021 Committee Descriptions, i.e., committee missions.

- Also review last term’s committee objectives to determine if any objectives will be carried over to the new term. There is no obligation to base new objectives on the objectives of the previous committee term unless that makes sense for your committee. This is an opportunity to create new committee objectives that align with the Strategic Plan and further the advancement of INTA.

- There is not a minimum or maximum requirement regarding the total number of SMART objectives for each committee or subcommittee. A good guideline is to keep the number of committee objectives to 5 or less. Subcommittee objectives should cascade from these and should be no more than 5 SMART objectives for each subcommittee.
Committee objectives should adhere to the “SMART” criteria = Specific, Measurable, Attainable, Realistic, Time-Bound

<table>
<thead>
<tr>
<th>Specific</th>
<th>Objectives should clearly specify what needs to be achieved by including as much information as possible on who, what, where, when and why.</th>
</tr>
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<tbody>
<tr>
<td>Measureable</td>
<td>Objectives should include some quantitative or qualitative measure of the extent to which the objective must be accomplished.</td>
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<tr>
<td>Attainable</td>
<td>Objectives should be within the committee’s control and influence—achievement should be feasible.</td>
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<tr>
<td>Realistic</td>
<td>The objective must take into account the resources and time available to attain the objective. Unrealistic objectives will have a counter-productive effect that may frustrate participants.</td>
</tr>
<tr>
<td>Time-Bound</td>
<td>The completion date or benchmark times must be clearly stated. Establishing milestone dates will help ensure that participants will make steady, measured progress towards goals, and will meaningfully inform feedback and communication throughout the performance measurement period.</td>
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</table>

- Be mindful of:
  - Staff v. member functions
  - Marketing and Communications strategies
  - Planned framework of INTA surveys and research studies
  - INTA Deliverable Guidelines for standards and approval procedures
  - Available IT resources
  - Possible overlap or collaboration with other committees
# Committee Leadership Transition Roadmap

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Group Responsible</th>
<th>Action Item</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Committee Leadership Nominations Process and Committee Selection Application Process</strong></td>
<td></td>
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</tr>
<tr>
<td>End-April through early June of Committee Selection Year</td>
<td>INTA Members</td>
<td>INTA Members submit nominations for Committee Chairs and Vice Chairs for the upcoming committee term.</td>
</tr>
<tr>
<td>June through July</td>
<td>Nominating Committee</td>
<td>The Nominating committee makes its selections for Committee Chairs and Vice Chairs. Before presenting the nominees to the Board of Directors for election, the nominees are contacted to make sure they are willing and able to serve if elected.</td>
</tr>
<tr>
<td>June/July</td>
<td>INTA Members</td>
<td>Members apply to be a member of a committee by submitting their preferred committee choices for the upcoming committee term.</td>
</tr>
<tr>
<td>August/early September</td>
<td>INTA Staff Liaisons</td>
<td>Staff Liaisons assign committee members based on balance of: • Regular and Associate members • Regional representation • Subject matter expertise • New and returning members Staff Liaisons also submit waiver requests and justifications for these waivers for Board approval. Waivers allow members to serve more than the two-term limit on committees when there is a specific need.</td>
</tr>
<tr>
<td>September Board Meeting</td>
<td>Board of Directors</td>
<td>Election of slate of nominees for Committee Chairs and Vice Chairs and review and approval of committee waiver requests.</td>
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<tr>
<td><strong>Outgoing/Incoming Committee Planning</strong></td>
<td></td>
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<tr>
<td>End - September</td>
<td>INTA Staff</td>
<td>• New Committee Leaders notified of Board’s approval of nomination • Committee applicants notified of committee assignments &amp; non-assignments ○ Strategic Plan &amp; Expectation Documents shared • Additional Leadership Meeting invitations sent to newly assigned Committee Members • Staff Liaison contacts new Committee Leadership</td>
</tr>
<tr>
<td>End – September through November</td>
<td>Outgoing Committee Leaders &amp; Staff Liaisons</td>
<td>Current committee objectives are reviewed and a final update is submitted in order to help incoming committee leaders draft committee objectives for the new term.</td>
</tr>
<tr>
<td>End September/early October</td>
<td>Incoming Committee Leaders &amp; Staff Liaisons</td>
<td>Incoming Committee Chairs, Vice Chairs and Staff Liaisons coordinate the sending of welcome emails to incoming committee members.</td>
</tr>
<tr>
<td>Before Leadership Meeting</td>
<td>Staff Liaisons</td>
<td>Staff Liaisons send all committee leaders and members the INTA Committee Management Toolkits.</td>
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<tr>
<td><strong>November Leadership Meeting</strong></td>
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<tr>
<td>November Board Meeting</td>
<td>Board of Directors</td>
<td>Election of incoming Officers, including Group Officers for committees of the Advocacy, Communications, and Resources Groups.</td>
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<tr>
<td>Timeframe</td>
<td>Group Responsible</td>
<td>Action Item</td>
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<tr>
<td>Leadership Labs at Leadership Meeting</td>
<td>Leadership Development Committee</td>
<td>Incoming and outgoing Chairs/Vice Chairs/Staff Liaisons should attend these benchmarking and training sessions. A special session is also planned for subcommittee leaders.</td>
</tr>
<tr>
<td>Committee Meetings at Leadership Meeting</td>
<td>Outgoing Committee Leaders, Staff Liaisons</td>
<td>Final In-Person Committee Meetings: Outgoing Committee Leaders hold last in-person committee and subcommittee meetings of the term. Especially if there is no meeting scheduled in December, this meeting will normally encompass:  • Final wrap-up of committee term  • Report of results and achievements  • Acknowledgement of volunteer contributions  • Incoming committee members and incoming committee leaders are invited and encouraged (but not required) to sit in as observers/guests to familiarize themselves with the work of the committee and to help with a more orderly transition.</td>
</tr>
<tr>
<td>Transition Meetings at Leadership Meeting</td>
<td>Outgoing &amp; Incoming Committee Chairs and Vice Chairs, Staff Liaisons</td>
<td>Outgoing and Incoming Committee Leaders (including Subcommittee Chairs if already identified) should hold a separate “Leadership Transition Meeting” to conduct the transition and hand-off to:  • Review relevant Committee Records, providing an opportunity for Incoming Committee Leaders to clarify status, get questions answered, and get Outgoing Leaders’ advice regarding the continuation of the committee's work (next steps, obstacles, etc.)  • Review any other relevant items and share undocumented wisdom (e.g., share info regarding star performers, potential leaders and their development, etc.)  • Note: If it is impossible to schedule a Leadership Transition Meeting for some committees at the Leadership Meeting, then this meeting should be scheduled to occur by conference call before the end of November.</td>
</tr>
<tr>
<td>Advocacy, Communications and Resources Group Meetings</td>
<td>Group Officers, Outgoing &amp; Incoming Committee Chairs and Vice Chairs, Staff Liaisons</td>
<td>Committee Chairs and Vice Chairs attend the Advocacy Group, Communications Group, or Resources Group Meetings held at the Leadership Meeting.</td>
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<tr>
<td><strong>Committee Objectives for New Term</strong></td>
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<tr>
<td>By December 6</td>
<td>Incoming Committee Leaders &amp; Staff Liaisons</td>
<td>Submission of committee objectives for new committee term. Some committees also submit subcommittee structure and subcommittee leaders in conjunction with the objectives, while others wait until the beginning of the new committee term.</td>
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<tr>
<td>By January 2020</td>
<td>Planning Committee &amp; Group Coordinators</td>
<td>Review and provide feedback/approval of new committee objectives.</td>
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<tr>
<td><strong>Preparation for Start of New Committee Term</strong></td>
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<tr>
<td>Month of December</td>
<td>Incoming Committee Leaders &amp; Staff Liaisons</td>
<td>Organize for start of new Committee term. December should be used primarily for Incoming Committee Leaders and Staff Liaison to get organized for the start of the new Committee term in January by:  • scheduling the first conference call in January in order to secure a date on calendars;  • planning the agenda for the first conference call; and  • deciding on the approach to selecting subcommittee leaders, if these have not previously been selected.</td>
</tr>
<tr>
<td>Month of December</td>
<td>Outgoing Committee Leaders &amp; Staff Liaisons</td>
<td>Final business “wrap up” of any continuing projects that could not be completed earlier and complete any transition that needs to occur.</td>
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<tr>
<td>Timeframe</td>
<td>Group Responsible</td>
<td>Action Item</td>
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<tr>
<td><strong>Kick Off New Committee Term</strong></td>
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| January 2020    | Committee Leaders, Members & Staff Liaisons     | Hold First full Committee “kick off” Conference Call – the purpose of this call is to introduce to all members the basic information they need regarding the committee before they break into subcommittee work. This first full committee call should cover the following:  
  • New committee leaders introduce themselves and Staff Liaison;  
  • Review Strategic Plan and Implementation Plan and where committee's work fits into these Plans;  
  • Review the organizational structure of the committee and its subcommittees;  
  • Review approved goals for the committee and its subcommittees;  
  • Describe the approach for selecting subcommittee leaders and members if these assignments have not already been made; and  
  • Give members any assignments they need to complete to get up to speed on the content of committee’s work. |
| By mid-February | Staff Liaisons                                  | Submit final subcommittee structure, subcommittee chairs, and subcommittee members for inclusion in database if this information has not already been provided. Staff Liaison to notify committee members of these subcommittee assignments. |
| February        | Subcommittee Leaders and Members                | After first full committee call, begin subcommittee calls:  
  • New subcommittee leaders introduce themselves and Staff Liaison;  
  • Review subcommittee objectives  
  • Move forward to begin work on deliverables; and  
  • Give members any assignments they need to complete in order to get up to speed on the content of subcommittee’s work. |
| March           | Group Officers and Group Coordinators           | Make first report to Board of Directors at March meeting, providing an overview of the transition completion and plans for advancing committee goals and objectives. Thereafter, committee updates are included in the Advocacy, Communications, and Resources Group Reports given at every Executive Committee meeting and Board of Directors meeting. |
Below are samples of the Committee Record Templates that are used as a tool for committees to keep track of meeting minutes, committee accomplishments, and progress toward objectives. Contact your staff liaison for editable versions of these templates.

### Advocacy Group 2020-21
**Full Committee Record**  
*Meeting Minutes/Objectives Status/Accomplishments*

<table>
<thead>
<tr>
<th>DOCUMENT DATE:</th>
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<tbody>
<tr>
<td>COMMITTEE:</td>
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<td>CHAIR:</td>
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<td>VICE CHAIR:</td>
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<tr>
<td>SUBCOMMITTEE RECORDS ATTACHED:</td>
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### SECTION I: MEETING MINUTES

**MEETING DATE:**  
Minutes Preparer:  
NEXT MEETING:

<table>
<thead>
<tr>
<th>Name</th>
<th>Email Address</th>
<th>Present</th>
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<tbody>
<tr>
<td>Members:</td>
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| Other Attendees: |  |  |  |
|  |  |  |  |

Discussion:
### Section II:

**STATUS OF OBJECTIVES AT FULL COMMITTEE LEVEL**

*(To Be Prepared by Chair)*

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Projects</th>
<th>Status</th>
<th>Deadline</th>
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<td>SECTION III: ACCOMPLISHMENTS</td>
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## SECTION I:
STATUS OF COMMITTEE LEVEL OBJECTIVES

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SECTION II:
MEETING ATTENDANCE AND MINUTES

Attendance and Discussion:
SECTION III: ACCOMPLISHMENTS

Please outline all completed deliverables and accomplishments to date by Subcommittee. This may include, but is not limited to *INTA Bulletin* Articles, INTA Blog Posts, Videos, Podcasts, Webinars, Programming, Publications, Board of Directors Presentations, etc.

- Accomplishment 1 (Date)
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Note Taker: 
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SECTION II:
MEETING ATTENDANCE AND MINUTES

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INTA Planning Committee
Expectations for Committee Participation and Performance

The Planning Committee of the INTA Board of Directors oversees committee management to ensure that the work of INTA’s committees is in alignment with the Strategic Plan and other Association priorities.

INTA committees were established to make policy recommendations to the Board of Directors, to execute the Association’s Strategic Plan by undertaking short-term and long-term assignments, and, in general, to carry out the work of the Association. INTA committees represent, involve, and serve the Association’s members and provide an important training ground for INTA’s future leaders.

The Board and the Planning Committee recognize that one of INTA’s most important assets is the talented and dedicated group of member volunteers who serve on its committees. Participation on an INTA committee offers a unique and rewarding opportunity to contribute to the advancement of the Association’s objectives, network among peers, and raise an individual’s visibility within the international trademark community.

Committee volunteers, together with INTA staff, share their collective expertise and common interests on a wide variety of committees, focusing on:

- Advocacy of trademarks and brand owner rights
- Resources dedicated to intellectual property advancement
- Communication and implementation of INTA’s strategic objectives
- Planning educational programs and events

However, committee members who are consistently unable to participate or provide input, who miss meetings or calls, or who are unavailable to volunteer for projects place an undue burden not only on committee leadership (the chair, vice chair, and subcommittee chair) and the staff liaison, but also on the other committee volunteers who are actively engaged in fulfilling their responsibilities on the committee. This could result in (1) stalled committee projects; (2) an unsatisfactory or burdensome committee experience for those to whom the work falls; and/or (3) dissatisfied performers, whose negative experience discourages them from serving on a committee in the future.

Furthermore, the number of committee assignments is limited to ensure the efficient operation of the committee structure and overall member satisfaction. The number of applications received during committee selection far exceeds the number of assignments available. As a consequence, INTA maintains a list of unassigned committee applicants. When necessary, a member from this list will be chosen to take the place of someone not actively participating on a committee or someone who resigns from a committee.

Therefore, to ensure that committees are working well and that committee participation is a rewarding experience for all, the Planning Committee audits committee participation and progress against objectives. The goal of this oversight is not to punish individuals for nonperformance, but rather to achieve optimal committee performance by (1) encouraging a climate of participation...
and (2) bringing in productive replacements for any committee member who, for whatever reason, is having challenges performing on a committee.

**Parameters of Participation and Performance**

It is important for committee leaders and staff liaisons to be mindful of the different forms committee participation may take. All committees schedule calls and meetings, and these include in-person meetings at the Annual Meeting and Leadership Meeting. Attendance during calls and meetings is just one measure of participation and performance. The Planning Committee recognizes that there are different ways to contribute to the success of a committee. For example, with regard to committee projects, some members are available for projects that require a quick turnaround, while others are able to contribute to long-term projects. Some members are skilled at brainstorming ideas, while others are skilled at implementing these ideas.

It is equally important for committee members to communicate to committee leadership if they are unable to participate for any reason or for a certain period of time, due to work or personal commitments. A member who sits on a committee and remains inactive without communicating with committee leaders is not furthering the objectives of that committee. Likewise, a long-term personal or professional issue may interfere with a committee member’s performance and necessitate that member’s resignation from the committee.

*Resignation from a committee in no way affects the member’s ability to serve on a committee in the future.*

**Expectations of Committee Leaders and Staff Liaisons Regarding Committee Participation and Performance**

- Remind committee members at the start of the committee term and periodically throughout the term that the Planning Committee has asked the committee leaders and staff liaisons to audit committee participation and performance.

- Set a call/meeting schedule at the beginning of the term, for at least the first year of the committee, keeping in mind public holidays and time zone differences, to provide ample notice of calls/meetings.

- Use Committee Record templates for every meeting/call to capture attendance, minutes, and progress against objectives.

- Together with your staff liaison, audit committee participation and performance on a quarterly basis to assess meeting/call attendance, completion of assignments by committee members, as well as other contributions to the success of the committee.

- Take action regarding the nonparticipating or nonperforming committee member, including:
  - Chair or Vice Chair to initiate contact with the committee member
o Staff liaison to follow-up, if necessary
o Staff liaison to remove from committee nonparticipating/nonperforming members who have not responded to contact by committee leadership and the staff liaison or whose participation and performance has not improved after a time agreed upon by committee leaders and the member.

- Report every six months to the Planning Committee in a manner to be prescribed on any performance issues and the action taken.

Expectations of Committee Members Regarding Committee Participation and Performance

- Calendar all your committee calls and meetings and make every effort to join calls and attend meetings.

- Inform your committee leaders and staff liaison if you cannot join a call or attend a meeting. Not participating on calls or in meetings regularly without prior notice can be interpreted as lack of commitment.

- Look for ways to contribute to the committee that capitalize on your skills, whether it is idea generation, research, writing, or meeting planning, etc.

- Complete your assignments by the agreed-upon deadline or provide advance notice to your committee leaders and staff liaison if you anticipate not meeting a deadline.

- Update your committee leaders and staff liaison on any developments in your professional life or personal life (to the extent you feel comfortable) that will impact your committee participation, whether it is for a short period or an extended period of time.

- Resign from the committee if, for whatever reason, you cannot participate in a meaningful way to fulfill your committee obligations. Resignation from a committee will not be held against you. In fact, it is worse to be inactive on your committee without communicating with your committee leadership or staff liaison.
Committee Leader Communications About Performance

Committee leaders should consult their staff liaisons to determine the best way to approach committee members about performance, whether through email, call, or in-person meeting, being mindful of cultural differences. For your reference, a sample email communication is provided below, but it is not mandatory that you use this method of communication.

Sample Email Communication

Dear [NAME],

The INTA Planning Committee asks committee leaders and staff liaisons to help them audit committee participation to ensure that committees are working well and that committee participation is a rewarding experience for all.

As [Chair/Vice Chair/Staff Liaison] of the [COMMITTEE NAME] I am contacting you concerning your participation in the committee.

I would like to discuss how we can change your participation going forward. As you probably know, every term, thousands of volunteers apply for INTA committee membership, several hundred more than INTA is able to place on committees. It is crucial that our committee members are able to devote 2–4 hours per month minimum for committee work, including attending committee conference calls, as you agreed when signing up for a committee.

We certainly understand if unexpected changes in your personal or professional commitments prevent you from participating as fully as you originally intended. If this is the case, please let me know if it is a temporary situation or a long-term issue that will necessitate your resignation from the committee so that we could replace you with someone who was not assigned to a committee who can give us the time commitment we need in order for our committee to be successful. If you need to resign from the committee, it will not affect your ability to serve on a committee in the future, nor will this replacement be part of INTA’s records.

I look forward to hearing from you. Thank you for your help in addressing this matter.
INTA Deliverable Guidelines

INTA is fueled by the volunteer efforts of its members, and welcomes the contributions of its committees. To ensure that committee-authored content reflects the expertise of INTA’s members and conforms to INTA’s standards for excellence, INTA has established the following guidelines for consideration of committee-authored content and programming.

This PDF document contains current guidelines for some of the deliverables most commonly produced by committees. Please consult with your INTA Staff Liaison if you have any questions.

*Use the bookmark feature or the links below to navigate to the different documents:*

- Advocacy Committee-Authoried Report Guidelines
- Amicus Brief Procedures
- Building Bridges Request Intake Form
- Europe Roundtable Host Packet
- INTA Bulletin Guidelines
- Program Proposal – from Staff Liaison
- Program Proposal – from Volunteer
- Study Intake Request Form
- Survey Request Form

*The Trademark Reporter Submission Guidelines*

For **factsheets, checklists, or other resources that do not fit into the above**: Please consult with Liz Hanellin, Director, Legal Resources, at ehanellin@inta.org before developing any of these resources.
Advocacy Committee-Authorized Report Guidelines

“Reports” are authored by Advocacy Group committees, and include such materials as best practices documents, toolkits, comparative charts, and/or analyses of collected survey data, recommendations, etc.

Reports may be posted on INTA.org here: https://www.inta.org/Advocacy/Pages/Reports.aspx

An alternative to posting committee work on the Reports Page of INTA.org is to share it on your committee landing page.

Please follow the steps on this checklist when you wish to post a Report on the Reports Page.

___ Committee leaders must read the Report and approve the content.

___ Staff liaison must read the Report and:

   ___ Approve the content
   ___ Spell check the document
   ___ Check the footnotes for numerical continuity
   ___ Submit the Report to Rosemary DeStefano in the Legal Resources Department for plagiarism checking: rdestefano@inta.org.

___ Once Rosemary has cleared the content, the staff liaison must:

   ___ Add a cover page that includes:

      ___ INTA letterhead; and
      ___ the following information:

      **Title of Report**
      **Committee and/or Subcommittee**
      **Date on which staff liaison approved for posting (month/date/year)**
      **Relevant Committee Members/Contributors (optional)**

___ Staff liaison must submit the approved report to webupdates@inta.org, requesting that it be posted on https://www.inta.org/Advocacy/Pages/Reports.aspx, and include a very brief
summary of the purpose of the report, which will also be posted on the Reports page. For example:

This report, prepared by the Best Practices Subcommittee of the Data Protection Committee, provides a comprehensive set of recommendations for brands to protect their trademarks in an era of big data and data collection. While recognizing the commercial value of data collection, the report summarizes its dangers and describes the best policies and methods corporations can implement to ensure a consistently good relationship with their consumer base.

INTA retains sole discretion whether to post a committee-generated report and reserves the right to remove a committee-generated report that has been posted.
Amicus Curiae—INTA’s role as Friend of the Court

The International Trademark Association provides expertise concerning trademark and other IP-related laws to courts and trademark offices around the world through the submission of amicus curiae ("friend of the court") briefs or similar filings. Through these kinds of filings, INTA takes advantage of procedures that allow an independent third party to a proceeding to voluntarily offer an opinion on a legal matter—such as the proper interpretation or application of the law, or an explanation for why certain policies are superior—and to educate the courts on a specific legal issue.

The purpose of INTA's intervention in such cases is to ensure that the court or tribunal is fully informed about the relevant issues that may impact the law in a given jurisdiction. Unlike the parties in litigations, who typically focus on the specific facts of a case and argue for a particular outcome, INTA plays a neutral role, addressing only the legal issues. The amicus curiae mechanism can offer courts, trademark offices, and other tribunals the benefit of INTA's independent perspective and its deep knowledge and experience about trademark and other IP-related laws. INTA’s involvement in these cases can strengthen legal discussions on intellectual property matters and improve decision-making in complex matters of public interest. INTA's intervention may be carried out through a brief, testimony, expert report, legal memorandum or other submission, depending on the procedural rules in force in the respective country and in the tribunal at issue. Usually, the submission is presented during the appeal stage, but INTA has participated at other stages as well, when the circumstances warrant.

The kinds of matters for which intervention by INTA may be appropriate include: matters that involve, relate to or potentially affect the law of trademarks, trade names and trade dress; the law of unfair competition; and other IP-related laws (e.g., right of publicity, false advertising, designs, domain names); or procedural issues related to such matters (e.g., standing, jurisdiction, evidentiary presumptions, use of surveys, remedies) (together, “Trademark, Unfair Competition and IP-Related Laws”).

INTA’s submissions in such cases are prepared by the Association’s International Amicus Committee (the “Committee”), under the direct supervision of INTA’s Executive Committee of the Board of Directors (the “Executive Committee”) with support from INTA staff (the “Staff Liaison”).

Procedure for Requesting INTA’s Intervention

INTA depends upon individuals around the world to alert INTA of cases involving Trademark, Unfair Competition and IP-Related Laws in which INTA’s intervention may be appropriate. If you are aware of a case in which input from INTA could be of value to the court, please let us know! You do not need to work for an INTA Member to submit a case for consideration.

To alert the Committee of such a case or request that INTA file a brief or other submission, please follow the policy and procedure outlined below.

INTA Amicus Brief Policy and Procedure

A. Policy Statement
1. *Amicus curiae* and other interventions are generally appropriate only in litigated matters. Generally, *amicus curiae* or other “friend of the court” submissions are appropriate in litigated matters, where a court, tribunal or trademark office will be making a decision about the law. These actions may include court actions, opposition proceedings and cancellation proceedings, among others. The *amicus curiae* process is not appropriate for legislative matters, such as arguments about the passage of new statutes, rules or regulations. Matters that are more appropriately considered legislative in nature should be brought to the attention of the Staff Liaison for reference to the relevant INTA committee (such as a substantive law committee or a committee that considers and proposes legislative revisions in the relevant jurisdiction).

2. Criteria for *amicus curiae* submission: The matter must meet at least one of the following criteria:

   a. The views of INTA have been specifically requested by the tribunal; or
   b. The question to be addressed directly affects INTA’s activities, or
   c. The matter involves, relates to or potentially affects Trademark, Unfair Competition and IP-Related Laws, and a filing by INTA would be reasonably likely to advance the strategic goals and objectives of INTA, including supporting trademarks and related intellectual property rights in order to protect consumers and to promote fair and effective commerce (see INTA’s Strategic Plan).

The Committee will consider all requests by third parties that comport with the Procedures outlined below. The Committee also regularly monitors leading cases involving Trademark, Unfair Competition and IP-Related Laws and may recommend to the Executive Committee that INTA, on its own initiative, seek to file an amicus brief or similar type of intervention. At the Committee’s discretion, it may (but is not required to) reach out to parties in a case it is monitoring to ask whether an amicus brief or other submission by INTA would be advisable, and whether the parties would like to make a formal request pursuant to this Policy. Other INTA committees also routinely monitor developments in Trademark, Unfair Competition and IP-Related Laws, and they may recommend that the Committee consider an amicus or similar filing in an appropriate case. The Committee, in its discretion, may recommend an amicus brief or similar filing even if the parties oppose INTA’s intervention and/or even if a party subsequently withdraws a request that it previously submitted to the Committee.

3. **Conflict of Interest Policy:** To ensure the independence and objectivity of INTA’s amicus process, Committee members (including invited experts or members of the Executive Committee) will not participate in the discussion or vote on any request that relates to a case in which they have a conflict of interest. Such a conflict of interest would arise (a) when the participant or the participant’s company or firm: (i) is a party to the case; (ii) is related to a party to the case (e.g., a parent, subsidiary or affiliate for a corporate party, or a spouse, child, parent or other close relative for an individual party); (iii) has a direct financial interest in the outcome of the case; or (iv) represents an entity that is a party, is related to a party, or has such a direct financial interest; or (b) when a conflict would arise under any ethical rule otherwise applicable to the participant, such as rules of professional conduct imposed by a bar in the member’s jurisdiction or the jurisdiction in which the case is pending. As long as there is no conflict of interest pursuant to the preceding principles, Committee members are not precluded from participating in the consideration of a case merely because the participant’s company, firm, or related entity, or a client of the participant’s firm, has an interest in, or has taken a position regarding, an issue relevant to the case, or is a member of the same industry as one or more of the parties to the case.

4. **Factors Supporting an Amicus Brief:** In deciding whether to recommend that INTA submit an amicus brief, the Committee will generally take the following non-exclusive factors into account:

   i. Whether the matter raises an issue of Trademark, Unfair Competition and IP-Related Laws of potential interest to INTA.
ii. The significance to trademark owners of the legal issues involved in the case, both in the jurisdiction in which the case is pending and in other jurisdictions.

iii. Whether the case involves primarily legal, as opposed to factual, disputes.

iv. Whether the legal issue involved in the case is settled law or is the subject of a conflict between courts within the country and/or between countries.

v. Whether the proposed filing would be consistent with resolutions adopted by the INTA Board of Directors or other promulgated INTA’s policies.

vi. The seniority or level of the tribunal before which the case is pending (e.g., whether it is the highest court of the country, an intermediate appellate court, or a trademark office or appeals board), and, where relevant, the potential precedential value of the ruling for which amicus participation is sought.

vii. Whether other entities seek intervention as amicus curiae, or are or may be involved in the case, and, if so, their identity (e.g., those representing a particular industry sector or public interest group).

viii. The quality of and positions taken in other briefs submitted in the case by the parties and any other amici, including in prior stages of the litigation.

ix. The public interest, if any, in the legal issues involved in the case.

x. Whether any request was made in accordance with INTA’s procedures and in sufficient time to permit the preparation of a quality brief.

Parties making requests should, to the extent appropriate, explain why their request is appropriate with reference to these factors and any other factors the requesting party believes are relevant. Parties are also asked to indicate whether the issues in the case are likely to have broader impact on Trademark, Unfair Competition and IP-Related Laws, other areas of the law, or within the relevant industries, and to explain those issues fully so that INTA can make an informed judgment.

In deciding whether to recommend that INTA submit an amicus brief or other submission, the Committee generally will NOT take the following factors into account:

i. Whether any of the parties to the case, or counsel to the parties, is an INTA member;

ii. The absence of any established INTA’s policy or position;

iii. Whether the tribunal in question typically receives amicus filings (unless the Committee determines that there would be no mechanism whatsoever through which to submit INTA’s position to the forum);

iv. The possibility that the tribunal in question may reject the position advocated by INTA.

It is important to emphasize that the Committee generally will recommend taking the position that it believes best advances INTA’s mission and strategic objectives, which includes the goals of supporting the development of Trademark, Unfair Competition and IP-Related Laws, protecting consumers, and promoting fair commerce. Moreover, the Committee expressly reserves the right to recommend positions that are different from those requested by the parties, including a party who is a member of INTA.
5. Appropriate Tribunals for Amicus Filings: INTA generally prefers to make amicus or similar filings at an appellate stage in the case, after a factual record has been established and an initial ruling has been made. Accordingly, a filing generally will not be made if the case is at the trial stage in the tribunal of first instance. However, in appropriate cases (such as a matter of significant importance, or where the principal issue in dispute at the court of first instance is primarily a legal issue), and in jurisdictions that permit amicus filings only in the tribunal of first instance, the Committee will consider filing in the tribunal of first instance.

B. Procedure for Requesting a Filing by INTA

1. Timing of Requests: INTA takes the filing of amicus briefs very seriously and can only make submissions when the process has been timely initiated to allow careful consideration and drafting as well as full adherence to this Policy. Assessment of issues and preparation of amicus filings require substantial effort and time in the Committee, the Executive Committee and INTA staff. This process requires significant commitments by member volunteers, who contribute their time and expertise on a pro bono basis. These commitments make it extremely difficult for requests to be considered and acted upon in less than 30 days, and even simple requests often demand up to 60 days to handle properly. Complex cases, such as those before the highest court of a jurisdiction involving novel issues of law, multi-jurisdictional proceedings, or the necessity of obtaining translations, demand even more time to review. Accordingly, requests should be made as early as possible, preferably at least 30 days in advance of any filing deadlines. INTA strongly suggests that requesters contact the appropriate Staff Liaison listed below as early as possible in the history of a case—even if a ruling has not yet been issued—if they believe that INTA’s involvement may be appropriate.

2. How to Make a Request: A requester may solicit consideration by INTA of a possible filing by submitting an electronic request to the Amicus Committee to the attention of the appropriate Staff Liaison member below:

   Asia-Pacific: Seth Hays at shays@inta.org
   Canada: Tiffany Pho at tpho@inta.org
   Europe: Carolina Oliveira at coliveira@inta.org
   Latin America: José Luis Londoño at jlondono@inta.org
   Middle East/Africa: Bruce MacPherson at bmacpherson@inta.org
   United States: Maysa Razavi at mrazavi@inta.org

   For cases conducted in a language other than English, materials must be submitted in both their original language and English translation.

   The request should take the form of a letter that fully explains the basis for the request. Although there is no page limit, parties are encouraged to make their requests as succinctly as possible—a few pages is often all that is required—to facilitate the Committee’s prompt review of the request. The request should include:

   • The case name, caption, number, and identity of the tribunal;
   • A list of all litigants, counsel and other interested parties involved in the case, to facilitate conflict of interest clearance by Committee members;
   • A brief summary of the procedural and decisional history of the case;
   • A description of the issue(s) the requester would like INTA to address in its filing, and the requester’s recommendation on the position INTA should take (along with references to supporting case law);
   • A discussion of whether the case is likely to have an impact beyond the parties, including any impact on other parties, on the development of Trademark, Unfair Competition and IP-Related Laws, or more generally within the relevant industries;
• A discussion as to why the issues are of significance to INTA and its membership, and how INTA’s participation in the case is likely to make a material contribution to a decision;
• Identification of any risks to INTA in seeking to participate as amicus (such as a risk of an award of costs against INTA should its motion to intervene be denied); and
• The full briefing schedule, including the deadline for making the requested filing, or if the briefing schedule has not yet been set or finalized, the anticipated briefing schedule.

In addition, the request should include:

• Electronic copies of the opinion(s) of the lower tribunals(s);
• Electronic copies of both parties’ briefs and supporting evidence related to the issue on which the requester seeks INTA’s intervention, including in prior stages of the litigation, if available;
• Electronic copies of any other material that the requester believes would be helpful to the Committee’s consideration; and
• An electronic copy of a complete description of the amicus or other procedure(s) permitted by the tribunal in question, and any rules applicable to such filings. (If there are no formal rules for amicus filings in the tribunal in question, but the tribunal would nevertheless accept an informal filing, such as an expert affidavit or letter, please provide as complete a description as possible of the procedures for such an informal filing in the tribunal at issue).

Finally, along with any request for an amicus brief, the requesting party must provide INTA with a separate letter, in a form suitable for filing with the tribunal if necessary, confirming its consent to INTA’s filing of an amicus brief in the matter, regardless of the position that INTA ultimately decides to take and regardless of whether INTA files an amicus brief in support of one of the parties or in support of neither party. Also, by making a request, the requesting party(ies) acknowledge that INTA can make it a condition of its seeking intervention that the requesting party(ies) has(ve) agreed that there be no (claim for a) costs order from its/their side in respect of INTA’s intervention.

3. Waiver of Electronic Submission Rule: The Committee expects that most requesters will have access to the technology that allows them to submit their request and supporting materials electronically. If a party is unable to submit its request or some or all supporting documents in electronic form, the requester may contact the appropriate Staff Liaison to explain the reasons for the inability to adhere to the electronic submission requirement and arrange for alternative means of submission (such as providing a sufficient number of hard copies of non-electronic materials for circulation to the Amicus Committee).

4. Copy to the Parties and Responses: The request shall show that a copy of the request was sent by the requester to counsel for the other party (or both parties) to the case by electronic means (e.g., email). The other parties generally shall have five (5) business days from their receipt of the request to submit to the Committee any response, which may include a request that INTA file an amicus brief or other submission from INTA would be unwarranted. In special circumstances, the Chair of the Committee (or, in the event of a conflict of interest, the Vice Chair or the Subcommittee Chair) may shorten or lengthen the time for response.

Absent exceptional circumstances, the parties should not provide the Committee with any further substantive submissions unless specifically requested by the Committee. The parties should, however, keep the Committee apprised through the Staff Liaison of any material developments in the case that might impact the Committee’s consideration of the request, including both as to the merits and as to the timing.

5. Confidentiality: Once a request is made, in order to maintain INTA’s independence, the amicus process will proceed confidentially. INTA will not disclose its deliberations to the parties, will not consult with the parties on the issues in the case and, if it decides to recommend the filing of
an amicus or other submission, will not inform the parties of the positions that INTA is likely to take. The parties generally will not be informed of INTA’s position until the day of the filing of the brief or other submission. The one exception to this rule is that, if INTA is not able to file an amicus brief or other submission on its own in a particular jurisdiction, and if its filing can more appropriately be considered by the tribunal if it is submitted by a party (either with its evidence or its arguments), then INTA may consult with that party to coordinate the filing of the amicus brief or other submission. In these circumstances, the party may need to be informed of INTA’s position and may need to be given an advance copy of INTA’s proposed filing, but any consultation with the party should address only the form of INTA’s submission and not its content.
BUILDING BRIDGES REQUEST INTAKE FORM (RF)
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<th>ORGANIZATION:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>INTA COMMITTEE (IF ANY):</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>NAME OF PROPOSED TARGET ASSOCIATION:</th>
</tr>
</thead>
</table>

**Explanatory notes:** Location refers to the complete address of the proposed Target association. If the proposed Target association has more than one location, please indicate the location of the headquarters. If your proposed bridge building activity is not with the headquarter location, please also indicate the other location of interest.

<table>
<thead>
<tr>
<th>SUBMISSION DATE:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SECTION I: BACKGROUND INFORMATION</th>
</tr>
</thead>
</table>

**Instructions:** Provide a short summary (5-10 lines) about the proposed Target Association (“Target”), as well as the URL of the Target’s main website, if any.

**Explanatory Notes:** Please attach or include links of the Target’s Strategic Plan or latest Annual Report, if publicly available. If pertinent, please attach or include links to high-profile media coverage regarding the Target in the last two calendar years, as well as any other potentially pertinent information regarding the Target that may impact the Building Bridges Committee’s decision making process.

<table>
<thead>
<tr>
<th>SECTION II: STRATEGIC FIT</th>
</tr>
</thead>
</table>

**Instructions:** Provide a short summary (3-5 bullet points) about how this Target can help the Building Bridges Committee meet its mission and objectives to support INTA’s 2018-2021 Strategic Plan. See explanatory notes for the Building Bridges Mission.

**Instructions:** Please answer the following questions, and include any other pertinent information related to the areas of inquiry below.

- What does the Target advocate for?
- What are the Target’s potential interests and needs?
- How does the Target’s interests and needs relate to trademark and brand protection, etc.?
- What potential synergies exist between the Target and INTA? Is there a mutuality of purpose?
- Are there similarities in organizational interests?
- Why would the Target be interested in INTA?
- What are some potential pitfalls to approaching the Target? Are there any conflicts of interest from INTA’s advocacy, resources and communications perspectives?
- What might be their resistance to INTA’s outreach? If so, would their anticipated resistance outweigh the potential synergies? How?

**Explanatory Notes:** The Building Bridges Committee Mission is to build bridges with organizations beyond the IP community, specifically business, marketing and consumer associations that have influence over legal, consumer, and public interest matters in order to create sustainable positive relationships, to promote the value of trademarks and related rights, and to facilitate the advancement of INTA’s Strategic Plan. Five segments of Targets of interest to the Building Bridges Committee are:

- Consumer Associations
- Marketing, Advertising, Franchising and Licensing Associations
- Small to Medium-Size Enterprises and Entrepreneur related Associations
- Manufacturing and Retail Associations
- Associations that develop and promote sustainability and ethical standards

Please also refer to the INTA Committee Descriptions on the INTA website available [here](#).

**SECTION III: OPERATIONAL FIT**

**Instructions:** Please answer the following questions, and include any other pertinent information related to the areas of inquiry below.

- What information is available regarding the Target’s membership? Is their member base comprised of organizations, individuals, or both? Is there an anticipated member overlap? Please provide details:

- What are the areas (advocacy, resources, and communications) or topics INTA can collaborate with the Target on? Examples can include, but are not limited to: GDPR, anticounterfeiting, anti IP sentiment, internet, brand restrictions, and others. Please provide details:

- What are possible avenues for INTA to reach out to the Target’s members, consumers, participants, etc.? Examples can include (non-exhaustive list):
  - Speaking opportunities – e.g., Informational seminar on trademarks (e.g., organizations with marketing teams or small businesses);
  - Sponsorship opportunities – e.g., INTA to donate or sponsor an event and get recognition as a sponsor at the event;
  - Provision of articles to their newsletters on a topic that is mutually agreed upon by both organizations;
  - Provision of webcast on topics that are mutually agreed upon by both organizations; and
  - Sharing of INTA’s UNREAL Campaign, social awareness campaign for teens about the dangers of counterfeits.
What are possible avenues for Target to reach out to INTA members? Examples can include (non-exhaustive):

- Speaking opportunities – e.g., Informational seminar on topics of interest to Target which are relevant to INTA’s audience;
- Sponsorship opportunities – e.g. at relevant INTA events
- Sharing any social awareness campaigns conducted by Target

SECTION IV: FINANCIAL FIT

Instructions: Please answer the following questions, and include any other pertinent information related to the areas of inquiry below. Please note that in the early stages, INTA will not be pursuing any cost/revenue sharing opportunities, unless there are exceptional circumstances and such circumstances have be approved by INTA leadership.

- Does the Target’s Annual Report (if any) provide information about the Target’s financial health? If so, please provide high-level summary of such information here.

SECTION V: OTHER POTENTIALLY RELEVANT INFORMATION

Instructions: Provide a short summary or any potentially relevant information regarding the Target that may be disclosed based on a review of publicly accessible materials regarding this Target. This can include any of the following:

- If you have a direct contact with the Target, would you be comfortable with facilitating an introduction? Yes or No. If yes, please provide the point of contact’s name, email, and relationship with INTA or its members.
- What (if any) any previous involvement, collaborations, contacts have there been between INTA and the Target during that last 7 years that you are aware of?
- Please also take this opportunity to review pertinent information and provide a high-level summary here, including a review of (a) the Target association’s website; (b) publicly available bios or other publicly available information regarding possible Target contact(s); and/or (c) social media pages of the Target association, if any.

SECTION VI: DECLARATION OF PERSONAL INTEREST

Instructions: Mark with “X” the appropriate box.

☐ Yes, I have personal interest in developing this strategic partnership. If “yes”, please provide an explanation here:

☐ No, I do not have a personal interest in developing this strategic partnership

Explanatory Notes: Having a personal interest in the Target is not a bar per se for INTA to pursue this partnership. Examples of personal interest are 1) you are applying for a job with the Target 2) the Target is a client of your organization. 3) your supervisor is a member of the Target 4) you have a leadership role with the Target 5) you are applying for a leadership role with the Target etc.

Thank you for submitting this request. The relevant Building Bridges committee member and INTA staff will review this request and revert to you shortly.
Europe Roundtable Host Packet

The INTA Roundtable program was established to enhance networking and educational opportunities for INTA members throughout the world. The intention is that INTA members host small Roundtables to provide interactive, high-quality discussion for attendees to share ideas, insights and practice tips in a non-commercial, non-competitive environment.

To host an INTA Roundtable, you / your organization must be an INTA Member in good standing. Hosting a Roundtable is a rewarding way of meeting other INTA members in your region, enhancing your legal and practical knowledge, and raising the profile of yourself and your firm.

The Roundtable host chooses a suitable topic, selects a speaker or speakers to assist in the discussion, selects a date, and arranges a suitable location for the Roundtable (often a conference room at their office). The suggested time for a roundtable event is two hours and no more than four hours for the entire event. These events generally work best over lunch time or in the late afternoon and the host will typically provide sandwiches or refreshments and canapés, depending on the time of day (at their own cost). Of course, the host may decide on a different timing and format to suit the local culture.

Roundtables are first and foremost educational events for no more than 20-50 people and should be kept at a neutral and factual level. They are not meant to be an advocacy or PR event. You may, however, wish to invite government officials (IP Offices, judges, customs authorities, others) to speak on any given topic. In any case, hosts should request approval from INTA staff prior to inviting any government officials.

We discourage you from organizing a Roundtable on a hot topic that INTA happens to be actively advocating on, unless the hosts and registrants stand ready to be briefed on INTA’s policy positions and are mindful not to use the event as means to advocate on current public policy issues, in particular if they are inconsistent with INTA’s stated position.

Any Roundtable has to be discussed with and approved by INTA staff before it takes place (see below for details). Please note that INTA reserves the right to request changes on the date or scope of the roundtable depending on the topic and speakers involved.

The arrangements must be approved in advance by INTA and INTA will then take responsibility for advertising and promoting the event on the website and in e-mail blasts to INTA members in the hosts country or region. The host may also advertise the event to local practitioners and colleagues. Once the event has taken place, the host will submit a brief report preferably with photos, to INTA and details may be published in the INTA Bulletin.

Preparing for the Roundtable

If you are interested in hosting, INTA will need the following information from you. Fill in all the information and return it to a member of the INTA Europe Roundtables Project Team and/or to Milesh Gordhandas, INTA Advisor, Europe Office, at mgordhandas@inta.org. Once it is received, we can add the Roundtable to the schedule. We ask for a 6-8 week window for all Roundtable requests to be able to properly market the event.

Title of roundtable and brief description of the topic (for marketing purposes):

Date:
Time:

Location:

Guest Speakers:

Moderator (if not the Host):

Host name and firm details:

Language: (if other than English, provide a second announcement in the language preferred)

- **Topics:**
  
  Each host may choose a topic that he or she considers to be most relevant to the anticipated attendees. By way of example, past Roundtable topics have included “The fight against counterfeits”, “the role of mediation in IP disputes”, “well known trademarks”, “current trademark decisions and developments”, “new gTLDs”, “the overlap between trademark and design” and “new forms of trademark infringement on the Internet”. The topic will be geared towards local practitioners so could involve recent developments in the local courts or IPO.

- **Date/ Time:**
  
  INTA recommends that roundtables take place over lunch or in the afternoon but ultimately the host determines the time of day they can host. If food is included, it should be light.

- **Location/Venue:**
  
  INTA recommends the roundtable discussion be held at your place of business. If a host cannot accommodate a large group, or the cultural norm is for such events to take place at a neutral venue, the host should select what they consider the most suitable venue (e.g., restaurant, business club, or a hotel).

- **Guest Speaker(s)/Moderator(s):**
  
  Typically, the host will moderate the roundtable but may prefer to have a guest moderator. Attendees are often attracted to INTA Roundtables by the promise of a well-regarded guest speaker or speakers to participate in the discussion. Examples, could be IPO examiners, local judiciary, customs officials, academics, or experienced practitioners from in-house or private practice. The host should provide the name, firm/company name, and full contact information of the guest speaker(s) and moderator(s). For invitations to government officials, please request approval from INTA prior to any contact with the identified official.
• **Format**

We should stress that these events are not intended to be lectures or formal seminars. The focus is on small events, either around tables or in a format which is interactive and encourages debate. Attendees should expect to participate in the event and hosts should be prepared to ask questions or raise issues to keep the discussion going. The number of attendees and the precise format will vary from country to country and can range from 20 to 50 people.

• **Host:**

INTA recommends that you remember to list the host firm/company name to ensure that the hosts is fully recognized in the marketing e-mail blast. As a reminder, only INTA Members can host an INTA Roundtable.

• **Registration and information:**

Roundtables are free to attend, and all who wish to attend the roundtable need to register online through INTA’s website. The two complimentary guests of the hosts must be provided to the staff liaison in order to have them registered. The hosts will be given a list of attendees 7 and 1 day prior to your roundtable or upon request.

• **Advertising, marketing and promotion:**

To properly market the roundtable, please submit your information at least 6 - 8 weeks prior to the scheduled event. INTA handles all advertising, marketing, and promotion. INTA will send 1-2 e-blasts about your Roundtable to your country, post the details on our website and promote the event in any other appropriate fashion. Hosts can supplement promotion/advertising efforts by providing direct mailings to colleagues, INTA members and non-members. Any advertising materials created directly by hosts should be reviewed by INTA before they are finalized.

Examples of typical advertisements and post-event reports can be found here and here respectively.

**Attendance and Introductions**

We suggest that hosts print badges and a sign-in sheet for attendees. INTA staff will provide you with the roster of registrants. At the beginning of your Roundtable, you may wish to introduce yourself and tell the group a little about yourself, about INTA and you may encourage all participants to introduce themselves briefly.

**Guide the Discussion**

The most successful Roundtables follow an outline on the topic that is developed by the host. The outline should be written to cover a wide range of issues within the topic and is meant to facilitate the conversation with the group.

Hosts should keep the discussion focused on the subject matter of the Roundtable. To the extent necessary, ask questions or raise issues that are related to the subject matter and involve as many people in the discussion as possible. If you find that a few people are monopolizing the conversation, do your best to encourage others to speak up.
As a reminder, in case of government officials present at the roundtable, the Host is responsible for keeping the discussion at a neutral/educational level and for ensuring there is no inconsistency between the discussions and the Association’s public policy position.

**CLE and CPD**

INTA does not apply for Continuing Legal Education (CLE) or Continuing Professional Development (CPD) credits for roundtables. Roundtable hosts may apply for such credits at their own discretion in their local jurisdictions, informing INTA or the Roundtables Project Team as appropriate.

- **Post event report**

INTA asks that Roundtable hosts provide a short report promptly after the event. Roundtable reports will be published in the INTA Bulletin and a brief summary, including photos, will be published and posted to INTA’s Facebook page and Twitter feed. Hosts should provide the following information to INTA.

Roundtable Title:

Date:

City:

Host firm:

Topic (one sentence summary):

Notable speakers (government representatives, INTA Officers, university professors or special attendees):

Discussion highlights (no more than three sentences):

Photographs: Please submit no more than four. Photographs must be attached separately to the email when submitting this report and not embedded in a Word document. Photos must be at least 500KB in size and taken with a camera – not a phone. Photos should show faces of the attendees, posed shots are fine. Photos should not show firm logos (other than incidentally), bright lights, or the backside of audience members, people eating or drinking.

**Questions, assistance and further information**

The Roundtable Project Team members will not typically attend Roundtables unless the event is local to them, but they will be happy to discuss plans, answer questions, assist and advise in order for the host to arrange a successful event.
Guidelines for Submitting Articles to the INTA Bulletin

The INTA Bulletin primarily relies on members of the INTA Bulletins Committee and INTA staff for content, but it does accept submissions from others. Before writing or submitting an article for publication, authors must confirm that their subject is available and appropriate for the INTA Bulletin. To do so, INTA Bulletins Committee members should contact the chairs of the subcommittee to which they are assigned; all others should contact the INTA Bulletin team at bulletin@inta.org.

General Writing Guidelines

1. **Format:** Prepare articles in Microsoft Word, 11 point Times New Roman, and with minimal formatting. Articles that are not prepared in this format will be returned to the author.

2. **Style:** Write clearly and succinctly. INTA Bulletin articles should use language that a worldwide audience can easily understand. Avoid legal jargon and colloquial language.

3. **Objectivity:** Write objectively—provide facts, not opinions or judgments. Articles discussing disputes should present a balanced view and provide counterarguments where applicable. Contributors are not permitted to write or verify articles about a topic or case in which they or their firm is directly involved. However, under extraordinary circumstances when an appropriate author or verifier cannot be identified, exceptions to this rule will be considered. Please contact your Subcommittee Co-Chair with a request for the exception to be applied. The Co-Chair will then liaise with the INTA Bulletins Committee Leadership (Chair, Vice Chair, and Managing Editor) to seek approval of the exception.

4. **Timeliness:** Reporting in a timely fashion is of critical importance. Articles covering past events and activities should be written and submitted within one week of the event or activity so that the article can be published within a month of the event / activity.

5. **Length:** Word counts are related to the type of article, allowing for some flexibility depending on the particular subject. In general, authors should abide by the following word counts: Features, 1000-2000 words; Law & Practice, 300-400 words; Event Reports, 500 words; Committee Spotlights, 400-500 words; and Volunteer Spotlights, 400 words.

6. **Verification:** All Law & Practice articles (about new cases, laws, or regulations) must be factually verified by someone from a firm or company other than the author’s firm. The author may find a verifier or may ask the INTA Bulletin editorial team for help (bulletin@inta.org). The verifier’s name will be published along with the contributing author’s name.

7. **Photographs and Illustrations:** Authors are encouraged to include relevant photographs or illustrations with their submissions. Images should be in high resolution JPEG, TIPP, EPS, or PDF format. Do not imbed images in the Microsoft Word document: instead, attach them to the email as separate files and simply indicate in the word document where the image(s) should appear. Indicate the source of the image; copyright permission can be obtained, if necessary. For photos of people, provide identification (name, title, name of firm / organization (country)) of the people in the photo, from left to right.

8. **Bylines and Attributions:** Submit articles with the author’s full name, company, city, state/province, and country included in the text of the Microsoft Word submission.

9. **Citations:** Citations should be to public services whenever possible (e.g., use the court’s docket number, not LEXIS or Westlaw, if an official reporter cite is not available).

10. **Footnotes:** Articles may not contain footnotes.
11. **Editorial Process:** All articles are subject to the editorial discretion of the *INTA Bulletin* editorial board. Editors are not required to show the article to the author before publishing. If there is concern that the substance of the item may have changed during the editorial process, the editorial board may consult with the author. If only stylistic changes are made, the author may not be consulted. Articles needing substantial revision may be returned to the author.

12. **Copyright:** INTA owns the copyright for each article that appears in the *INTA Bulletin*.

13. **Reprint Policy and Republication:** INTA encourages reuse and republication of articles that were originally published in the *INTA Bulletin*. Authors who would like to post their article on a company website or republish in another publication should contact the *INTA Bulletin* team for permission before proceeding (bulletin@inta.org).
INTA PROGRAM PROPOSAL

1. Date of Proposal:

2. Proposed by:

3. Title / Subject:

4. Main Topics / Outline:

5. Session Suggestions (if any):

6. Length of Program:

7. Date of Program:

8. Location of Program:

9. Proposed Chair(s):

10. Proposed Project Team:

11. Proposed Speakers / Moderators (if any):

12. Committee(s) Involved:

13. Anticipated Audience:

14. Strategic Plan Fit:

15. Competitive Programs:
   a. Internal (including if INTA has held similar events in the past):
   b. External:

16. Registration Fee:
   a. Early Bird – Member: US $
   b. Late – Member: US $
   c. Early Bird – Non-Member: US $
   d. Late – Non-Member: US $

17. Projected Paid Attendance:
INTA PROPOSAL FORM

Thank you for submitting an INTA proposal for programming. Please note that a proposal submission does not guarantee acceptance. INTA staff must determine if the proposed event (1) meets INTA’s strategic directions, (2) has a market, and (3) fits within INTA’s calendar of events.

Proposals should be submitted at least 3 months before proposed launch date.

If your proposal is selected for development, the appropriate INTA staff liaison from the Education Department will contact you to discuss the next steps in the planning process. If your proposal is not accepted, you will be notified and INTA will keep the proposal for future consideration. Please submit all proposals to soconnell@inta.org.

1. Title / Subject:

2. Type of Program (Choose One):
   
   _____ Roundtable
   _____ Webcast
   _____ AM Session
   _____ LM Session
   _____ 1-Day Conference
   _____ 2-Day Conference

3. Proposed by:

4. Proposed Date(s):

5. Event Education Level (Beginner, Intermediate, Advanced):

6. Duration of event:

7. Main Topics / Brief Description of event (at least 3-4 bullets of details needed)
8. Individual Session Suggestion(s) (for a webcast, roundtable or program):

9. Suggested Speakers:

10. Specific Committee involvement?

11. Any special technology requirements?

12. Format ideas:

13. Anticipated Audience:

14. INTA Strategic Plan Fit:

15. Will CLE be offered?

16. Location suggestions: (Final location decisions are made by INTA):
Study Intake Request Form

The purpose of this form is to allow members of the Research Advisory Council and INTA Research Department Staff to understand the goals of the proposed study, the research context in which it will take place, the research needs, and the timing, which, in turn, will allow us to prioritize multiple research requests and to create a robust feedback process.

Please contact Sheila Francis, INTA’s Director of Strategic Partnerships and Economic Research at sfrancis@inta.org for more information.

SECTION 1

Background Information

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<tr>
<th>#</th>
<th>Question</th>
<th>Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Submitting person or group</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Submission date</td>
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<tr>
<td>3</td>
<td>Name of proposed study</td>
<td>A short name is helpful for tracking purposes. Please note that the name may change when the study is published.</td>
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<td>#</td>
<td>Question</td>
<td>Description</td>
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| 4 | Briefly describe the study, its objectives, and the type of deliverable anticipated | **What will be studied?** Please provide your study hypothesis in a single sentence.  

What are the provable hypotheses or anticipated results of the study?  
What, if any, supporting justification is there for proceeding with the study? Please provide relevant facts and/or figures.  
What is the origin of this study (i.e. how did this study request come to be?)  
What type of deliverable is anticipated? |
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<th>#</th>
<th>Question</th>
<th>Description</th>
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<tbody>
<tr>
<td>5</td>
<td>SECTION 2</td>
<td>Explain why INTA should pursue the study—what specific, stated, or understood goals or initiatives of INTA will it help promote?</td>
</tr>
</tbody>
</table>

Alignment with INTA Strategic Plan

Articulate how the proposal aligns with and is reasonably likely to advance INTA Strategic Directions as listed here:

Promote the Value of Trademarks and Brands
Reinforce Consumer Trust
Embrace Innovation and Change

Does the study request relate to a previous INTA impact study?

To assist you in completing this section, please review INTA’s 2018–2021 Strategic Plan ([http://www.inta.org/Governance/Pages/StrategicPlan.aspx](http://www.inta.org/Governance/Pages/StrategicPlan.aspx))
### Constituencies and Geographic Regions

What constituencies and/or what geographic regions is the study likely to impact?

Please describe the constituencies/audience(s) that you seek to influence with the study results. Possible constituencies/audiences could include but would not be limited to: INTA membership (consisting of brand owner representatives, brand protection and trademark professionals, academics interested in the field of IP, judges, media, and government officials) and non-IP audiences, such as marketing and advertising professionals, business leaders, non-IP law makers, and media and consumers at large.

In what way are you seeking to influence the intended audience? What action/behavioral change are you seeking from the intended audience as a result of this study?

Which countries or geographic regions will the study cover and where it will be most effectively deployed, once published? Please provide rationale for your chosen countries or regions.
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<th>Question</th>
<th>Description</th>
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<tbody>
<tr>
<td>7</td>
<td>SECTION 4</td>
<td>Please describe the area(s) of trademark law, practice, or brands that this study is likely to cover. Please take this opportunity to refine what you are asking INTA to study.</td>
</tr>
</tbody>
</table>

What area(s) of trademark law, practice, or brands is the study likely to cover?
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<tr>
<th>#</th>
<th>Question</th>
<th>Description</th>
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</table>
| 8  | SECTION 5                                     | **Preexisting Research and Data**<br>Are you aware of any other studies that are similar in subject matter within the relevant jurisdiction(s) (i.e., can any third-party study be used to limit the scale of the proposed study)? If so, please list the study (or studies) below and provide a link if available.  
**Other research in this area**<br>Are there other studies that had an impact similar to what you are looking for from the proposed study (even if outside the relevant jurisdiction)? If so, please list the study (or studies) below and provide a link if available.  
We understand that an exhaustive search is not feasible, but to the extent you know of research already conducted, it would be very helpful for us to know about it. If a study is not in English, please provide a translation of the Executive Summary in English.  
If a link is unavailable but you have an electronic file, please send it via email to sfrancis@inta.org specifying the name of your submitted proposal it relates to. |
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<th>#</th>
<th>Question</th>
<th>Description</th>
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<tbody>
<tr>
<td>9</td>
<td>Data available to conduct research In the area</td>
<td>One of the largest impediments to success of producing research has been locating and accessing the appropriate data sets. Are you aware of any underlying reliable data (IP, economic, and other types of data) that could help when researching this subject? We do not expect study requesters to have a full understanding of data requirements or availability; however, if you are aware of available data, it would be very helpful for us to know about it. If you foresee any data challenges, please let us know as well.</td>
</tr>
</tbody>
</table>

10  **SECTION 6**  

**Resources for Conducting a Study**

**Budget**

If you have a budget estimate for this proposed study, please share this information with us. While there is no requirement of external funding, if you do have any external funding sources in mind, please let us know.
<table>
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<th>#</th>
<th>Question</th>
<th>Description</th>
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</table>
| 11 | Timing   | **What is the ideal release date for the study?**  

If you have information about how long this study could take to conduct, please let us know.  

**How time-sensitive are the results?**  

**What is the expected life of the value of the study?**  

**Will the study need to be repeated periodically?** |
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<th>Question</th>
<th>Description</th>
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<tbody>
<tr>
<td>12</td>
<td>Vendors/Researchers</td>
<td>Please list any vendors/researchers that you are aware of who are competent in the subject matter of the proposed study (institutes, think tanks, academics, etc.). Can this vendor/researcher effectively communicate the results to the target audience (i.e., use terminology that is understandable for “average” members of the target audience) and write his/her/its report of findings and conclusions in the pertinent languages (possibly, more than one language)? If the vendor/researcher is an academic, will he/she be working with INTA on behalf of the academic institution with which he/she is affiliated or in a personal capacity? Are the credentials of the vendor/researcher sufficient to give legitimacy to the study in light of any anticipated scrutiny from third parties?</td>
</tr>
<tr>
<td>#</td>
<td>Question</td>
<td>Description</td>
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<td>----</td>
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<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>13</td>
<td>Study partners</td>
<td>Can or should the study be undertaken/sponsored by an entity other than INTA, either to gain efficiencies and expertise or to avoid the appearance of bias by virtue of INTA’s sponsorship?</td>
</tr>
</tbody>
</table>

*With which entities could INTA partner?*
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<th>#</th>
<th>Question</th>
<th>Description</th>
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<tbody>
<tr>
<td>14</td>
<td>SECTION 7</td>
<td>To the best of your knowledge, will this study be controversial in any way?</td>
</tr>
</tbody>
</table>

**Controversy flags**

*Note: This is not a disqualifying factor per se, but we would like to understand who might be concerned with the results and the nature of the concern, if any.*

| 15 | SECTION 8  | What language will the study be produced in?                                |

**Study language**

*Will translation be necessary?*
<table>
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<th>#</th>
<th>Question</th>
<th>Description</th>
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<tbody>
<tr>
<td>16</td>
<td>SECTION 9</td>
<td>Is there anything else relevant to the decision process that you can share with us? It may be helpful to review INTA’s 2018–2021 Strategic Plan.</td>
</tr>
</tbody>
</table>

**Additional information**

INTA’s 2018–2021 Strategic Plan  
([http://www.inta.org/Governance/Pages/StrategicPlan.aspx](http://www.inta.org/Governance/Pages/StrategicPlan.aspx))
Survey Request Form

Please fill this form out in its entirety (acknowledge any non-applicable fields as N/A), include the survey questions in a separate attachment, and email both documents to Lyonel Yu (lyu@inta.org) and cc-Paula Lee (plee@inta.org).

1. Date:

2. Requester name:

3. Department:

4. Committee:
   Please state the name of the committee that is originating the survey.

5. Requested date of launch:
   Please allow at least three to four weeks for survey review, preparation, and testing; additional lead time may be required depending on the complexity of the survey.

5. Target audience:
   Please be very specific. If you will be providing the list of survey recipients, please do so at least one week prior to launch; please keep in mind data privacy regulations.

6. Purpose of the survey:
   Please specify the reason for the survey, its goals, and how the information will be used.

7. Blurb:
   Please draft a blurb about the survey, its content, and purpose. This blurb will be used in the survey introduction, as well as the eblast to survey recipients.
8. Format for the raw results:
PDF or XLS, (Select either or both)

9. Reviewers:
Please specify the non-marketing staff members who need to review the survey before launch.

10. Survey results:
The survey results and an executive summary will be shared with the requester a few weeks after the survey closes. Apart from INTA staff, who else should the survey results be shared with?
* Final distribution is up to the discretion of the CEO and Director, Marketing & Communications.

11. Any special requests?

Timeline:
Step 1: Receipt of Survey Request Form and Proposed Survey Questions
Step 2: Analysis of Survey Request Form
Step 3: Meet with requester to review Survey and Proposed Survey Questions
Step 4: Meet with Manager, Marketing
Step 5: Revert back to requester with questions
Step 6: Create survey in Survey Monkey
Step 7: Provide draft to Director, Marketing & Communications for review
Step 8: Make edits to survey
Step 9: Provide requester with the final copy of the survey
Step 10: Requester provides survey recipient list
Step 11: Survey launches
Step 12: Reminder email after one week
Step 13: Survey closes after two weeks
Step 14: Survey results and analysis sent to requester a few weeks after survey closes

Note: We send out surveys on Mondays, with a two-week window for responses. We send a reminder email one week after the original email.
Since 1911, The Trademark Reporter (TMR) has delivered cutting-edge, peer-reviewed legal scholarship on trademarks, brands, and related areas of intellectual property to practitioners, academics, and courts around the globe.

The TMR welcomes all submissions on trademarks, brands, and related areas of intellectual property.

SUBMISSIONS

The TMR invites the submission of articles, commentaries, and book reviews. Submissions should be made via email to tmr [at] inta [dot] org.

All submissions to the TMR should be in .doc or .docx format.

ARTICLES

Article Length

Article length is flexible, depending on what is necessary to cover the subject adequately. The TMR strongly prefers articles under 25,000 words in length—the equivalent of fifty pages—including text and footnotes.

COMMENTARIES

A commentary is an opinion piece with a clear viewpoint. A commentary may be provocative or amusing, may offer practical advice, or may be a poetic musing on some aspect of trademark and related law, theory, or practice. Such a piece may be more “freewheeling” than a typical scholarly law journal article. It need not, and generally will not, be written in an objective style. Most commentaries are between approximately 2,000 words—the equivalent of four pages—and 5,000 words—the equivalent of ten pages.
BOOK REVIEWS

Books for review by the TMR are routed through the TMR Editor-in-Chief. Those wishing to recommend a book for review and/or those who would like to write a book review should contact the TMR Editor-in-Chief at tmr [at] inta [dot] org. An author may suggest their own book for review. In this case, if the TMR Editor-in-Chief agrees that the book should be reviewed, they will ask for a volunteer on the TMR Committee (other than the book’s author or author’s colleague) to review the book.

AUTHOR INFORMATION FOR ALL SUBMISSIONS

To preserve the integrity of the TMR’s peer review process, NEVER put author information in a footnote within the submission. All author information (such as title, organization, affiliations, acknowledgements, etc.) should be placed in a separate .doc or .docx file accompanying the submission.

CITATIONS

Although submissions selected for publication are edited by TMR Committee members and/or INTA staff, authors are solely responsible for ensuring the accuracy of their citations. Failure to properly cite authorities may delay or prevent publication.

STYLE

General Matters of Style

In preparing text and footnotes, authors should generally follow The Bluebook: A Uniform System of Citation, twentieth edition (The Bluebook), except as noted below under “Citation Style Specific to the TMR.”

For those matters of style (punctuation, capitalization, etc.) not covered by the The Bluebook, consult The Chicago Manual of Style, seventeenth edition. (For example, both Chicago and TMR recommend use of the serial comma—the comma before the conjunction in a list of items, as per rule 6.18 of Chicago.)

Per The Bluebook, case names in full citations should not be italicized.

Also per The Bluebook, case names should be italicized in the following instances: in textual sentences, unless the case name appears in a sentence in an italicized title (e.g., “The author made this point in her commentary The Switch Thrown Wrong—How Railrunner Sent Intent-to-Use Down the Wrong Tracks.”); in a footnote when referred to in a complete sentence (“The judge held that the plaintiff in Winners v. Losers, 121 F.3d 555, 55 U.S.P.Q.2d 1030 (1999), did not act in bad faith.”); or in a short citation (“Winners, 121 F.3d at 558.”).

The following should also be italicized: explanatory phrases (“In re Winners, 111 F.3d 234 (1997)”), supra and infra, foreign words that have not been assimilated into the English language, quoted words that were italicized in the originally quoted text, emphasized words, and titles of publications when referred to in textual sentences.
Citation Style Specific to the TMR

When citing the TMR, do not use *Bluebook* style for the journal name. Instead, cite as “TMR”:


[Author], [Title], [Volume] TMR [page no.] ([publication date])

Never use small caps (i.e., as per *The Bluebook*, small and large caps). Where *The Bluebook* indicates use of small and large caps (e.g., in reference to a book title), the TMR uses regular Roman type:


As per *The Bluebook*, “supra” and “infra” should not be used to refer to cases. In other words, do not use “supra” or “infra” and a footnote number to refer to a case that appears in an earlier or later footnote. Instead, repeat the citation of the case in full or, if the case was cited earlier in the same footnote or in one of the preceding five footnotes, use the proper short citation of the case, along with the pincite (the exact page number of the material referenced).

Citation to *McCarthy on Trademarks and Unfair Competition* is as follows:

Example of first instance:


[Author], [Title] § [sec. no.], at [page no(s).] ([edition number] ed. [publication date]).

Example of second instance:


It is acceptable to use “supra” to refer back to the first mention of *McCarthy* even if the subsequent mention is a reference to a different volume of *McCarthy*. In any case, this is now irrelevant, as TMR no longer cites volume numbers for the McCarthy treatise.

J. Thomas McCarthy has requested that the TMR not use volume numbers in cites to his treatise. As per J.T. McCarthy: “The *Blue Book* style is based on an antiquated style of a multi-volume treatise of hard-bound volumes. But many treatises now (like mine) are loose-leaf, and now and then over the years, chapters are moved from one volume to another in order to even out the size of pages in a volume. So a cite to a section now in volume 3 might two years later be moved to volume 4, defeating the whole purpose of the *Blue Book* style.”

Parallel citations (such as U.S.P.Q. citations) are not required. If they are used, however, any point pages (pincites) should be listed in each citation:


For internal references to footnotes, spell out “note” (e.g., note 5).
Citations to cases in jurisdictions outside the United States should be consistent within a submitted piece. For a list of citation conventions by country, consult *The Bluebook*, at table T.2.

For more detailed information on *Bluebook* style and citation style specific to the TMR, see the TMR Guide to *Bluebook* Rules, provided on request.

**Section Levels**

All articles should contain an introduction as the opening section and should be enumerated with a centered, boldface, and all capital-letter heading as follows:

I. INTRODUCTION

Sections should be demarcated as follows:

I. MAIN HEADING (ALL CAPS)
   A. Subsection Level 1 (italic)
      1. Subsection Level 2
         a. Subsection Level 3 (italic)
            (1) Subsection Level 4

**Proper Reference to Trademarks**

Except when uppercase or lowercase letters are part of the design, generally distinguish trademarks from surrounding text by referring to them in ALL CAPS.

The Kellogg Company recently launched a new KELLOGG’S EGGO waffle. Last week, ToroHead, Inc. applied to register the trademark ToroMR.

A trademark should be used as a modifier, not a noun, and should be followed by the noun it modifies.

a HERSHEY’S KISSES candy [not a HERSHEY’S KISS]

Never modify a trademark by pluralizing it.

TIC TAC candies [not TIC TACs or TIC TACS]
KLEENEX tissues [not KLEENEXES]

Trademarks should not be used as verbs:

Please XEROX the report. [incorrect]
Please use the XEROX copier to make six copies. [correct]

Trademarks should not be used in the possessive form unless the trademark itself is possessive (e.g., JACK DANIEL’S whiskey). Do not modify a trademark from its possessive form if the trademark is possessive.

FEBREZE’s fresh scent [incorrect]
the FEBREZE spray’s fresh scent [correct]
Chicago Manual of Style Rule 8.152 states:

“Although the symbols ® and ™ (for registered and unregistered trademarks, respectively) often accompany trademark names on product packaging and in promotional material, there is no legal requirement to use these symbols, and they should be omitted whenever possible. (If one of these symbols must be used at the end of a product name, it should appear before any period, comma, or other mark of punctuation.)”

PUBLICATION

As a matter of policy, the TMR does not provide the reasons for its publication decisions. The TMR cannot guarantee publication or timing of publication. Regarding those submissions that are selected for publication, the TMR retains sole discretion in determining in which issue a piece will be published.

QUERIES

Please contact us with any questions at tmr [at] inta [dot] org.