**Study Intake Request Form**

The purpose of this form helps INTA’s Research Advisory Council and 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. All of this information will allow us to prioritize multiple research requests and to develop studies that will advance the Association’s advocacy, resources, and communications initiatives.

The 2020 Call for Study Requests runs from **May 27 to August 17**. Completed request forms must be submitted during this time frame—the submission of a request form does not guarantee that INTA will pursue the study. Completed forms and any questions about the Call can be directed to Renee Garrahan at [rgarrahan@inta.org](mailto:rgarrahan@inta.org).

SECTION 1

Background Information

| **#** | **Question** | **Description** |
| --- | --- | --- |
| 1 | **Submitting person or group** |  |
| 2 | **Submitting person’s organization** |  |
| 3 | **Submission date** |  |
| 4 | **Name of the proposed study** | *A short name is helpful for tracking purposes. Please note that the name may change when the study is published.* |
| 5 | **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?* |
| 6 | SECTION 2  Alignment with INTA Strategic Plan  **Articulate how the study request 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 | *Explain why INTA should pursue the study request—what specific, stated, or understood goals or initiatives of INTA will it help promote?*  *Does the study request relate to a previous INTA study? Previous studies are available* [*here*](https://www.inta.org/perspective/?searchType=perspectives&menu%5Bcontent_type%5D=Industry%20Research)*.*  *To assist you in completing this section, please review INTA’s* [*2018–2021 Strategic Plan*](https://www.inta.org/about/leadership-governance/strategic-plan/) *and our Study Prioritization Criteria attached at the end of this form as Appendix A. The Study Prioritization Criteria helps us vet all incoming study requests.* |
| 7 | SECTION 3  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 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 lawmakers, 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 a rationale for your chosen countries or regions.* |
| 8 | SECTION 4  Area of Trademark Law/Practice and/or Brands to be Covered  **What area(s) of trademark law, practice, or brands is the study likely to cover?** | *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.* |
| 9 | **SECTION 5**  **Preexisting Research and Data**  **Other research in this area** | *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.*  *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 Renee Garrahan at* [*rgarrahan@inta.org*](mailto:rgarrahan@inta.org)*, specifying the name of your submitted study request it relates to.*  *To download INTA’s previous studies, visit* [*here*](https://www.inta.org/perspective/?searchType=perspectives&menu%5Bcontent_type%5D=Industry%20Research)*.* |
| 10 | **Data available to research the area** | *One of the largest impediments to the success of producing studies 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 beneficial for us to know about it. If you foresee any data challenges, please let us know as well.* |
| 11 | **SECTION 6**  **Resources for Conducting a Study**  **Budget** | *INTA commissions approved study projects. 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. You are not required to seek budget estimates from potential research service providers.* |
| 12 | **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 are time-sensitive are the results?*  *What is the expected life of the value of the study?*  *Will the study need to be repeated periodically?* |
| 13 | **Vendors/Researchers** | *Please list any vendors/researchers that you are aware of who is 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?* |
| 14 | **Study partners** | *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?*  *With which entities could INTA partner?* |
| 15 | **SECTION 7**  **Controversy flags** | *To the best of your knowledge, will this study be controversial in any way?*  *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.* |
| 16 | **SECTION 8**  **Study language** | *What language will the study be produced in?*  *Will translation be necessary?* |
| 17 | **SECTION 9**  **Additional information** | *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*](https://www.inta.org/about/leadership-governance/strategic-plan/) *and our Study Prioritization Criteria.*  *Our Study Prioritization Criteria is attached at the end of this form as Appendix A. The Study Prioritization Criteria helps us vet all incoming study requests.* |  |

**Appendix A: Research Advisory Council Prioritization Form**

**NOTE: THIS IS NOT TO BE FILLED OUT BY STUDY REQUESTORS. THIS IS FOR REFERENCE ONLY.**

|  |  |  |
| --- | --- | --- |
| **CRITERIA** |  |  |
|  |  |  |
| ***PRIMARY DRIVERS*** | ***Pass/Fail*** | ***Reviewer Comments*** |
|  |  |  |
| **Does the study request align with, and is it reasonably likely to advance INTA Strategic Objectives? (Intake Form Q6)**  **Promote the Value of Trademarks and Brands:**   * Protection of trademarks and related IP * Harmonization of laws and convergence of practices * Enforcement * The business value of brands   **Reinforce Consumer Trust:**   * Reinforce trademarks as sources of information and brands as promises of delivery * Communicate the contribution of brands to economies and society * Brand equity   **Embrace Innovation and Change:**   * Evaluate changes as a result of technology, innovation, and evolving consumer needs and values * Educate members on the impact of innovation, technology, and change on brands * Provide innovative, valuable services to members |  |  |
| **Does the study request clearly state its objectives, provide supporting justification, and articulate provable hypotheses or anticipated findings? (Intake Form Q5)** |  |  |
| **Does the study request articulate what constituencies and/or what geographic regions are likely to be impacted? (Intake Form Q7)** |  |  |
| **Does the study request articulate what area of trademark law or practice is likely to be impacted? (Intake Form Q8)** |  |  |
|  |  |  |
| ***\* SECONDARY DRIVERS – SCORED*** | ***Score Secondary Drivers 1-4 below on a scale of 1-9 (see attached scoring guideline)*** | ***Provide comments explaining your score. The more detail provided, the better the full committee can evaluate the study request. Should a study be rejected or returned for revision, these comments will be of great assistance to the proposing individual(s) or committee.*** |
| ***1. Implementation / Execution Considerations (Intake Form Q9 & Q10)***  Consider such factors as:   * Is there reliable data to evaluate the study’s hypothesis? * Can a third-party study be re-used to limit scale? * How complex, technically viable, is the study? |  |  |
|  |  |  |
| ***2. Timing Considerations(Intake Form Q12)***  Consider such factors as:   * How time-sensitive is the issue? Is there sufficient time to permit the preparation of a quality study? * How long will it take to complete the study? Can it be completed within a meaningful time frame (need to factor in the internal vetting process at companies to the extent we need members to “go on the record.”)? * What is the expected life of the value of the study? * Will it need to be repeated periodically? * How many other studies are in contention at the current time? How time-sensitive are those studies? |  |  |
|  |  |  |
| ***3. Study vendors/researchers/partners and Partnering Considerations (Intake Form Q13 & Q14)***  Consider such factors as:   * Are there research firms/entities/academics competent in the subject matter? Are their credentials sufficient to give legitimacy to the study in light of any anticipated scrutiny from third parties? * Can we partner with another organization for shared sponsorship? * Can or should the study be undertaken or 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? * Can the available study providers effectively communicate the results to the target audience (i.e., use terminology that is understandable for “average” members of the target audience)? * Can the available study providers write their report of findings and conclusions in the pertinent languages (possibly, more than one language)? |  |  |
| ***4. Budget Considerations (Intake Form Q11)***  Consider such factors as:   * What is the anticipated cost? * Funding availability – Should we reach out to any entities at the study request evaluation stage to find out if we could get some funding from non-INTA sources? |  |  |
|  |  |  |
| ***\* TOTAL SCORE***  ***Add all the scores in sections 1-4 above and divide by four (4).*** |  |  |
|  |  |  |
| ***SECONDARY DRIVERS – UNSCORED***  ***No scoring is necessary for considerations in this section, only comments.*** |  |  |
|  |  |  |
| ***Communications Considerations (Intake Form Q15)***  Consider such factors as:   * Is the issue controversial? * Is the proposed study likely to be subject to scrutiny, and if so, by whom? * What are the implications of the anticipated scrutiny? * Could the results of the study be inconsistent with resolutions adopted by the INTA Board of Directors or other promulgated INTA’s policies? * Does the possibility of any such controversies and scrutiny significantly outweigh the value of moving forward with the study? | ***Note: The existence or possibility of controversy is not a reason to approve or reject a study request, but any potential controversy should be disclosed so INTA can take it into account in determining whether to proceed and to be prepared should the study be approved.*** |  |
| ***Additional Comments (Intake Form Q17)*** | ***Please add any additional comments you feel may impact the importance or viability of this study request*** |  |