



# PIUG 2020 Annual Business Meeting

Wednesday 13 May 2020



# Business Meeting Agenda

- PIUG 2020 Annual Conference Update
- Report from the PIUG Chair
- PIUG Committee Reports & Updates
- Questions & Comments & Discussion



# PIUG 2020 Annual Conference

- Moved to October 12-16 at Caribe Royale in Orlando
- Will be a similar format but shifted
- Discussing virtual options
- Service awards, Kaback award, Stockdale award



# Sponsors

- Gold
  - Derwent
  - STN
- Silver
  - BizInt Smart Charts
- Bronze
  - Aptean GenomeQuest
  - CPA Global
  - Minesoft
  - Questel
- Exhibitors Plus
  - EPO
  - PCT Help-Desk
- Exhibitors
  - Ambercite



# 2020 Annual Conference Volunteers

- Planning Co-Chairs –**Martha Yates** and **Ken Koubek**
- Program Chair– **Martha Yates**
- Program Committee—**Shelley Pavlek** and **Lucy Antunes**
- Brian Stockdale Award Committee – **Tony Trippe (Chair)**, **Dominic DeMarco**, **Ken Koubek**, **Andrea Davis**
- Stu Kaback Business Impact Award Committee – **Malcolm Hallam**, **Stephen Adams**, **Shelley Pavlek**, **Yun Yun Yang**, **Tony Trippe**, and **Elliott Linder**
- Evaluations – **Ken Koubek (AC)**
- Gifts – **Ken Koubek (AC)**
- First Time Attendee Welcome & Orientation – **Suzanne Robins (Chair)** and the **Member Relations Committee**
- Meeting Book – **Diane Webb**
- Photography – **Sandra Unger**
- Signage – **Zhifu Shu**
- Sponsorship & Exhibits – **Jane Thompson** and **Ken Koubek**
- Travel—**Ron Kaminecki**
- Web pages – **Tom Wolff (Webmaster)**
- Workshops – **Martha Yates**



## Save the Dates

- PIUG 2021 Annual Conference
  - May 2-6 Westin Alexandria
- PIUG 2021 Biotech Conference
  - Feb 23-24, Kimpton Marlowe, Boston



# Board of Directors

- **Martha Yates** (Chair 2018-2020)
- **Shelley Pavlek** (Vice-Chair 2018-2020)
- **Malcolm Hallam** (Treasurer 2018-2020)
- **Rosanna Lindquist** (Secretary 2018-2020)
- **Elliott Linder** (Immediate Past Chair 2018-2020)
- **Heather Simmons** (Director at Large 2016-2020)
- **Ron Kaminecki** (Director at Large 2018-2022)



# New Board of Directors

- **Shelley Pavlek** (Chair 2020-2022)
- **Kim Miller** (Vice-Chair 2020-2022)
- **Malcolm Hallam** (Treasurer 2020-2022)
- **Leah Sandvoss** (Secretary 2020-2022)
- **Martha Yates** (Immediate Past Chair 2020-2022)
- **Victoria Smith** (Director at Large 2020-2024)
- **Ron Kaminecki** (Director at Large 2018-2022)





# Report from the Chair

Martha Yates



# High Points

- Thank you
  - Board
  - Committee members
  - Volunteers
- Update PIUG website
- Retire PIUG wiki



# PIUG Functional Committees

- **Membership – Chair position vacant**
  - Seth Mendelson, Acting Chair
- **Member Relations Committee – Suzanne Robins, Chair**
- **Electronic Communications Committee – Chair position vacant**
  - Tom Wolff, Acting Chair
- **Sponsorship Committee – Ken Koubek**
  - Jane Thompson, past Chair
- **Education and Training Committee – John Zabilski, Chair**
- **Certification Committee – Ron Kaminecki, Chair**
- **Partnerships and Patent Offices Committee – Cynthia Barcelon-Yang and Stephen Adams, Co-Chairs**
  - **Chair position vacant for 2020**
- **Nominating Committee – Rosie Lindquist, Carol Bachmann and Ken Koubek**



# Agenda for Committee Reports

- Treasurer's Report – Malcolm Hallam
- PIUG 2019 Northeast Conference Report –Shelley Pavlek
- PIUG 2020 Biotech Conference Report –Alison Taylor
- Membership and Member Relations Committee Report—  
Suzanne Robins
- Certification Committee Report—Ron Kaminecki
- Electronic Communications Committee Report –Tom Wolff
- Partnerships and Patent Offices Committee Report—Elliott  
Linder
- Education and Training Committee Report—John Zabilski



# Treasurer's Report

**Malcolm Hallam**

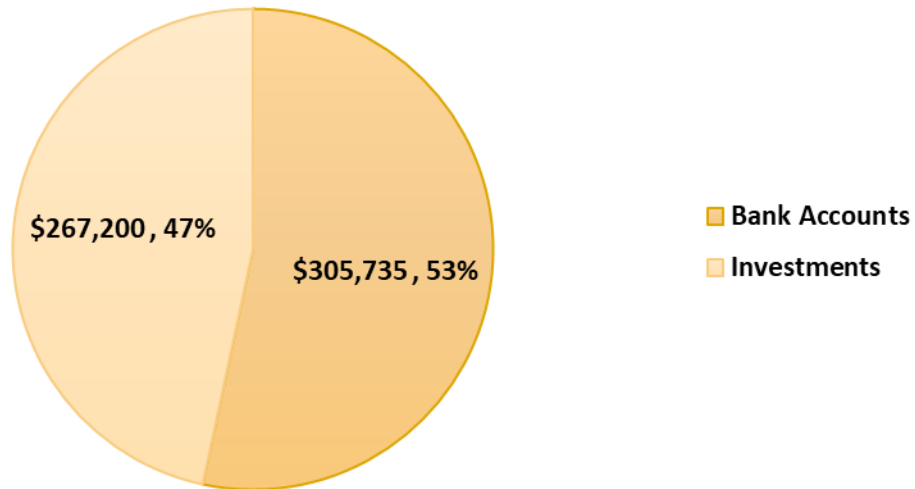
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# Our net worth remains robust

	12/31/2017	12/31/2018	12/31/2019
Net worth	\$583,159	\$591,554	\$530,258

Account Balances 4/1/2020: \$572,935





# Financial Stewardship

- Investments are moderately conservative
- Cash cushion to cover wide variations in timing of income and expenses, especially around conferences
- Reserves provide contingency against unforeseen economic situations
- We are in good shape to weather the 2020 pandemic



# We are making money on education offerings but now losing on conferences

Net Income	Annual Conference	Northeast Conference	Biotech Conference	Classroom Courses	Webinar Courses
2018-19	(\$954)	(\$5,191)	(\$1,715)	\$8,529	\$3,042
2019-20	(\$61,235)	(\$1,479)	\$7,715	\$1,257	\$5,019

- Lower attendance at all conferences
- Criticality of hotel room bookings
- Strong sponsor support at Biotech 2020
- Course expenses include faculty share of proceeds





# Conference Economics

- Venue fees and concessions rely on hotel room uptake:
  - 2019 Alexandria attrition penalty ~ \$18,700
- Registration fees contributed ~ \$73,000 – about 25% of budget
- Sponsors & Exhibitors contributed ~ \$135,000 to the 2019 conference
- 2020 in Orlando – a lot still unknown



# Treasurer Takeaways

- Membership declining and attendance has been down at all of our conferences
- Conference economics have become tough
- Educational offerings have done well but need increased effort
- DC/Alexandria location for Annual Conference doesn't guarantee high attendance



# PIUG 2019 Northeast Conference

September 23-25, 2019  
The APA Hotel Woodbridge  
Iselin, NJ



# Sponsors

## Gold Sponsor

- BizInt Solutions

## Silver Sponsor

- STN International

## Bronze Sponsors

- CAS
- aptean GenomeQuest
- Minesoft, Ltd.
- Questel



# Volunteers

## **Program Committee:**

- Shelley Pavlek (Chair), John Marlin, Yateen Pargaonkar, Leah Sandvoss, Don Walter

## **Planning Committee:**

- Chair: Shelley Pavlek
- Evaluations: Shelley Pavlek
- Exhibit Hall: Ken Koubek
- Meeting Booklet: Diane Webb
- Networking: Rick Williams
- Photography: Sandra Unger
- Registration: Ken Koubek, Shelley Pavlek
- Signage: Hongbo Liu
- Sponsorship: Ken Koubek
- Webpage: Rick Williams, Tom Wolff
- Workshops: Shelley Pavlek



# Feedback

## Positives:

- 97% said meeting was worthwhile
- Strong Program (one of our strongest)
- Top Presenters:
  - Keith Schreiber (Pfizer) – Structure Search Capabilities
  - Ashton Delauney (Bristol-Myers Squibb) – Sovereign Immunity
- Plenty of time for questions & exhibit hall

## Needs Improvement:

- Need more attendees
- Need more sponsors – not enough new customers to justify sponsorship cost
- Conference location and venue had mixed reviews
- AV needs to be improved – trouble advancing slides during the entire conference
- Less presentations & more time for networking
- More time for workshops; hands-on learning



# Hiatus for 2020

PIUG Board will revisit for 2021



# **PIUG 2020 Biotechnology Conference Summary**

Tuesday and Wednesday, 25-26 February, 2020

Kimpton Marlowe, Cambridge, MA





# Highlights

- Full day Plenary session with 7 speakers covering patent eligibility (keynote), sequence searching, antibody claims, and biotech IP and filings analyses.
  - One remote speaker from EPO
- Panel session on Searcher/Practitioner collaboration
- 68 attendees in total
- Conference made a profit of \$7714.



# Highlights

- Full day Workshops session with 5 presenters
  - Sessions included hands-on training
  - Hands-on training may require a longer workshop session to accommodate effective learning
- 7 Exhibitors showcased new products and services
  - Suggestion made to allow exhibitors 2 days for booth and demo presentations.



# Learnings & Plans for Future Conferences

## Learnings

- Hotel good but on-site PIUG hotel liaison person needed
- Remote speaker sessions need a validated procedure

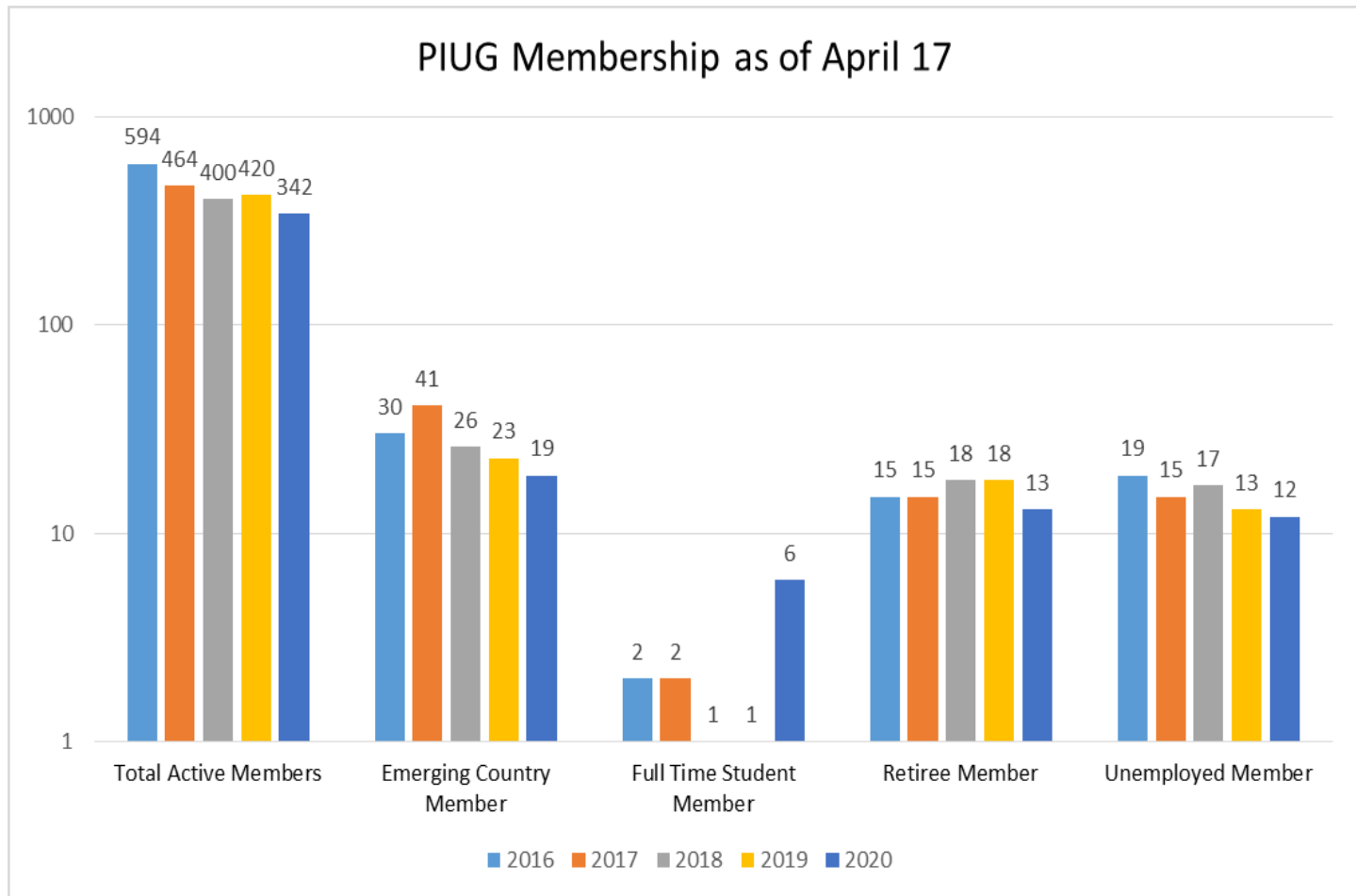
## Plans for Future Conferences

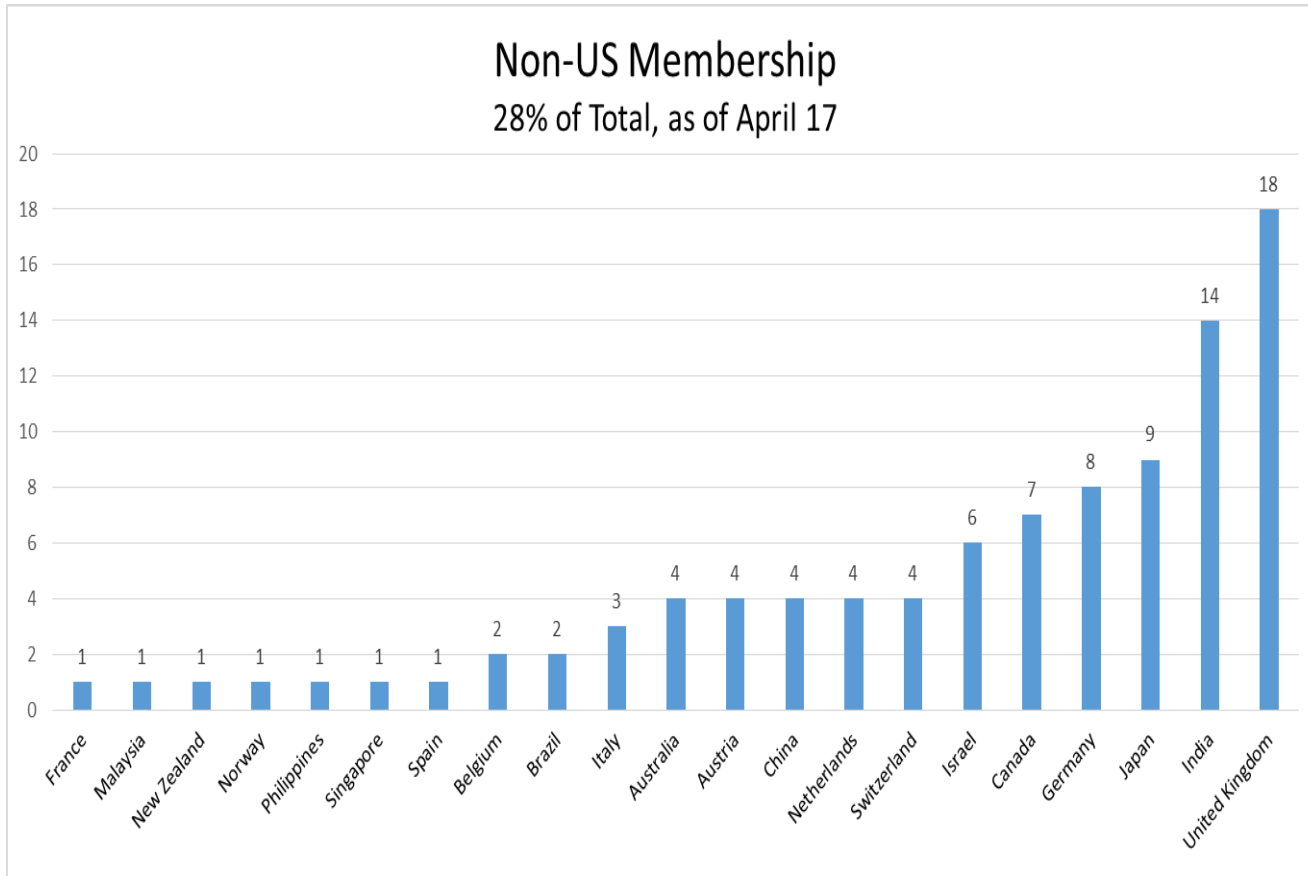
- West coast location
- Modify publicity to attract more attendees
- Investigate options for remote attendance



# **Membership and Member Relations Committee Reports**

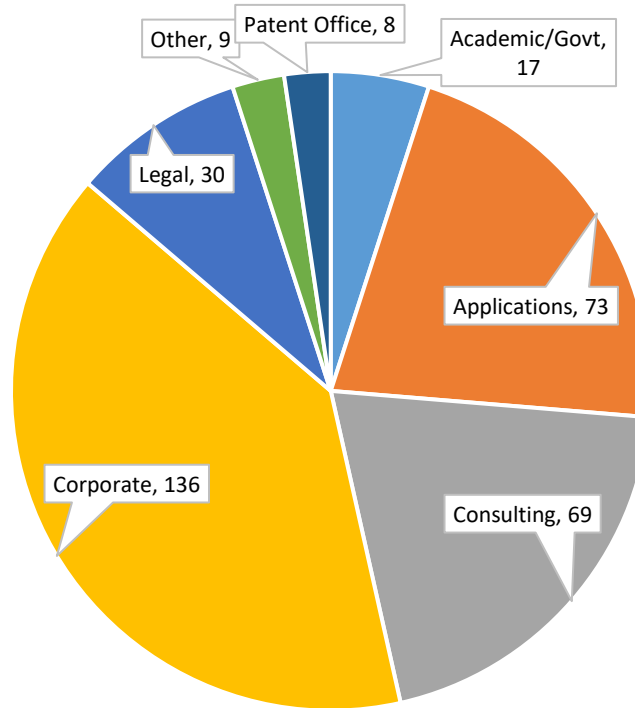
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## PIUG Membership by Affiliation



April 17,



# PIUG Member Relations Committee

- **Goal**
  - To welcome new members and increase retention of current members
- **Activities**
  - Committee meets monthly by teleconferences; sends personalized emails at various times throughout the year - to new and returning members, to first time conference attendees before and after the conference, to previous meeting attendees who have not registered





# PIUG Member Relations Committee

- **Activities (continued)**
  - Host First Time Conference Attendee Welcome and Orientation Reception at Annual Conferences
  - Create Tips for First Time Conference Attendees for Website
- Reach out to previous meeting attendees yet to register for a meeting.



## PIUG Member Relations Committee

- **Committee Members** - \* Are volunteers sending emails to members
  - Suzanne Robins (Chair)
  - Malcolm Hallam\* (International Member Liaison Officer and Board Liaison)
  - Cathy Chiba\*
  - Seth Mendelson\*
  - Kartar Arora\*
  - Heidi Stone\*
  - Wongel Tefera\*
  - Barbara Miller\*
  - Cedric Tchakounte\*
  - Heather Simmons
  - Gus Pinto
  - A.J. D'Ambra
  - Ken Koubek
  - Tom Wolff
  - Elliott Linder
  - Kris Atkinson
  - Barbara Hampton



# Certification

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# Certification

- PIUG members involved in certification:
  - **Susanne Hantos**, (Vice Chair) Supervisory Committee; Examination Committee
  - **Andrea Davis**, (Chair) Qualifications & Continued Professional Development Committee
  - **Ron Kaminecki**, Professional Representatives Collegium; Examination Committee
  - **Julia Heinrich**, Examination Committee
  - **Tony Trippe**; Examination Committee
  - **Barbara Miller**, Accreditation Committee



# Certification

- **Bettina de Jong**, Professional Representatives Collegium (Chair); ISBQPIP Chair
- **David Borel**, Professional Representatives Collegium (Switzerland)
- **Stephen Adams**, BPIP (UK), Professional Representatives Collegium
- **Bernd Wolter**, Professional Representatives Collegium (Secretary); Examination Committee;
- **Aalt van de Kuilen**, Accreditation Committee



# Certification

- Professional Experience Recognition (PER)
  - 262 certificates out of 280 applicants
  - Germany 46
  - US 32
  - Netherlands 31
  - UK 30
  - Switzerland 27
  - Italy 20...



# Certification

- Next exam in preparation
  - Search paper
  - Analysis paper
- Continued Professional Development
  - Five points (activities) last year
  - Ten points per year now



# Partnerships & Patent Offices (PPO) Committee

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Elliott Linder





# PPO Committee Members

- Stephen Adams (ex co-chair)
- Cynthia Barcelon-Yang (ex co-chair)
- Andrea Davis
- Cynthia Gallagher
- Susanne Hantos
- Elliott Linder
- Edlyn Simmons
- Alison Taylor
- Wongel Tefera



**WANTED**

## **PPO Committee Chair or Co-Chairs**

PIUG extends its gratitude to ***Cynthia Barcelon-Yang*** and ***Stephen Adams*** for co-chairing the PPO Committee since its inception in 2016. With Cynthia's recent retirement and Stephen's scaled-back schedule, PIUG is seeking volunteers to chair or co-chair the PPO Committee. If you are interested in volunteering, please contact ***Shelley Pavlek, Martha Yates, or Elliott Linder.***



# Recent and Upcoming Activity

- **USPTO**

- Presented at 2019 Northeast Conference and 2020 Biotech Conference; scheduled to present at 2020 Annual Conference

- **EPO**

- Presented at 2020 Biotech Conference; scheduled to present and be an exhibitor at 2020 Annual Conference



# Recent and Upcoming Activity

- **WIPO**

- Stephen Adams attended the Committee on WIPO Standards (CWS) in Geneva in July 2019
- Scheduled to present at 2020 Annual Conference
- [WIPO INSPIRE](#) (ex-Intellogist)
  - Unfortunately, the new database is lacking the narrative, comparative content that made Intellogist so valuable.
  - WIPO needs input from providers and PIUG volunteers to develop, maintain, and review timely content. We need a PIUG volunteer to champion this initiative.



# Recent and Upcoming Activity

- **WIPO**

- [Patent Register Portal](#)

- The PIUG Patent Register Cheat Sheet project (Cynthia Barcelon-Yang, Cynthia Gallagher, Elliott Linder, Wongel Tefera) was abandoned as an independent effort in favor of cooperating with, rather than duplicating, WIPO and EPO projects, including also the [EPO Patent Register](#) and the [Federated Register](#) (covering post-grant national-phase actions).



# Recent and Upcoming Activity

- **KIPO**

- [PCT Korea Help-desk](#) plans to be an exhibitor at 2020 Annual Conference



# Recent and Upcoming Activity

- **Asia-Pacific Conferences/Relations**

- PIUG members conducted sessions and made presentations at the Chinese Intellectual Property Annual Conference (CIPAC) in 2016-2018 and at the Japan Patent Information Fair & Conference (PIFC) in 2017. Unfortunately, PIUG did not realize the benefits that we were hoping for, i.e., increased Asian membership and participation.



# Recent and Upcoming Activity

- **Asia-Pacific Conferences/Relations (cont'd)**
  - Therefore the PIUG Board of Directors decided to cease financially supporting these events.
  - The PPO Committee and the Board recognize the value of cultivating the relationship between PIUG and our Asian colleagues. PPO Committee members have put forth several suggestions for consideration by the newly-elected PIUG Board.





# Recent and Upcoming Activity

- **Asia-Pacific Conferences/Relations (cont'd)**
  - These suggestions include:
    - Online participation at Asian events, if available
    - Asian-language landing and benefits pages on the PIUG website
      - Japanese, Korean, Mandarin
    - Dedicated Asian-language pages, where curated, translated “nuggets” from PIUG conference presentations could be posted by native speakers



# Recent and Upcoming Activity

- **Asia-Pacific Conferences/Relations (cont'd)**
  - These suggestions include:
    - Asian-language calls for abstracts for PIUG conferences
    - Asian-language monitored website forum where PIUG Asian members can reply to questions from Asian colleagues



# Recent and Upcoming Activity

- **ACS**

- PIUG co-sponsored a symposium at the ACS Fall 2019 National Meeting in San Diego in August. Entitled “Nothing New Under the Sun: The Practical Challenges of Patent Novelty Searching”, the session was part of the Chemical Information Division (CINF) program, and was also co-sponsored by the division of Chemistry and the Law (CHAL) and the Committee on Patents and Related Matters (CPRM). Edlyn Simmons and Stephen Adams were co-organizers. In Edlyn’s absence, Stephen chaired the session.



# Recent and Upcoming Activity

- **PDG**

- Andrea Davis represented PIUG as an observer at the April 2019 PDG Impact meeting.
- Stephen Adams attended the October 2019 meeting at Agfa in Antwerp.
- The 2020 Impact meeting has been postponed from April until at least the autumn due to the pandemic. If Andrea is still living in Europe she will likely attend.



# **Reconfigured PIUG Web Media Electronic Communications Committee**

Wednesday 13 May 2020



**WANTED**

## **Electronic Communications Committee Chair or Co-Chairs**

PIUG extends its gratitude to *Tom Wolff* for chairing the Electronic Communications Committee for many years. Tom has wanted to scale back his leadership in this area, thus PIUG is seeking volunteers to chair or co-chair the ECC Committee. If you are interested in volunteering, please contact *Shelley Pavlek, Martha Yates, or Tom Wolff*.



# PIUG Website and Wiki

- PIUG website
  - PIUG Board hired a Wild Apricot Expert to develop a new design
  - Improved access, one login account = one sign-on
  - Enhanced appeal
  - All active web content including forums, registration, dues
- PIUG wiki
  - Eliminate active use of the PIUG wiki
  - Retain for archival purposes only



# PIUG Website Updated

- All critical features on the website
- Eliminates delays and inconvenience of maintaining wiki accounts or multiple PIUG web accounts
- Improved and simplified menu system
- Reworked home page
  - Photos to create more interest in activities
  - Upcoming Events
  - Quick Links
  - Recent Forum postings
  - Mission and “Why Join PIUG”
  - Sponsors and Partners





# PIUG Website – Forums

- PIUG Public Discussion Forum (PIUG-PF)
- PIUG Job Postings Forum
- 2020 Biotechnology Conference Committee Forum
- 2020 Annual Conference Planning Committee Forum
- Member Relations Committee Forum



# PIUG Website – “About PIUG”

- [PIUG - Internet Disclaimer & Copyright Notice](#)
- [PIUG Antitrust Policy](#)
- [PIUG Bylaws](#)
- [History of PIUG](#) including Brief History, and Bibliography
- [PIUG Milestones](#)
- [PIUG Officers and Directors \(Past and current\)](#)
- [PIUG History - A Collection of Remembrances.](#)



# PIUG Website Covers All PIUG Conferences

- Conference information copied from the wiki
  - 44 Conferences from 2006-2019
  - 72 total conference session days
  - 1150 total Plenary presentation pdf documents
  - All conference books, all PIUG sponsored workshop pdf documents, and review articles for Biotech Conferences



# Possible Content to Copy from the PIUG Wiki to Website

- Updating and editing would be needed
  - [How PIUG Works](#)
  - [PIUG Committees and Teams](#)
  - [How to Become a Patent Information Professional](#)
  - [Patent Information Bibliography](#)
    - [Books](#)
    - [Articles](#)
    - [Other references](#)
    - [Top Ten Publications by Stephen Adams](#)
    - [Top Ten Publications by Edlyn Simmons](#)



# Archival PIUG Wiki

- Some content either cannot be moved or would need major effort and maintenance
  - 7 Discussion Forums
  - [Knowledge Pages](#) and subpages
  - [Patent Resources](#) and many subpages
  - [Patent Information Meetings, Conferences, and Seminars](#)
  - [Training Opportunities \(onsite workshops and courses\)](#) and subpages



# **Education and Training Committee**

## John Zabilski, Chair



# Education & Training 2019 Tasks

- **Annual Meeting Training - May 4, 2019**
  - Introduction to Patent Searching
  - Patent Searching Fundamentals
- **Analytics Webinar Series**
  - Recorded on-demand analytics training session
- **PIUG Website Education Page**

<https://www.piug.org/education>



# Education & Training 2020 Goals

- **Create PIUG Training Library**
  - Create introductory sessions
    - promoted to the current membership
    - open to the public for attracting new members
- **For PIUG Members**
  - Catalog PIUG presentations from past meetings
  - Invite past presenters to record live versions of their PIUG presentations for on-demand training
- **Advanced training webinars for everyone**





## Other discussion topics

- How do we retain and attract members?
- How do we retain and attract sponsors?
- Future of annual conference
  - Length
  - Mixture of in person and virtual?