IPO STRATEGIC PLAN

January 1, 2027 – December 31, 2029

Intellectual Property Owners Association

STRATEGIC INTENT IPO gives IP owners a voice on the issues that matter — including how AI is transforming innovation — and educates policy makers on the evolving legal landscape.

SHARED OUTCOMES ACROSS ALL PILLARS: RELEVANCE | TRUST | RESPONSIVENESS | THE VOICE OF IP OWNERS

1 AI IMPACT STRATEGY

STRATEGIC GOAL

Lead the voice of IP owners on AI law and policy, prioritizing education of policy makers on the impact of AI on the IP legal framework, partnering with the USPTO on its adoption of AI tools, and providing AI best practices to the board and the membership at a pace that matches the urgency of the moment.

OBJECTIVES

1A Strategy for Developing Policy Positions on the Legal Framework

A task force creates an AI and IP policy roadmap; the board adopts positions against it across the three-year plan.

1B Aggregation and Dissemination of AI Resources for Members

Collect and circulate best practice guidance and resources for deployment of AI for the legal function through a member-facing resource portfolio and annual thought leadership.

DESIRED OUTCOME

A board adopted set of AI and IP policy positions, developed under the modernized consensus protocol, with IPO recognized as the convening authority that translates AI innovation into operable IP guidance for government and industry.

2 ADVOCACY & CONSENSUS PROTOCOL

STRATEGIC GOAL

Modernize IPO's consensus protocol so the organization can speak credibly on the issues that matter, on the timelines that matter, and represent both areas of agreement and areas of divergence with equal clarity, even in the absence of full unanimity.

OBJECTIVES

2A Develop Protocol for Taking Positions on Contentious Issues

Distinguish full consensus, working majority, and contested positions; define how IPO acts and speaks in the absence of unanimity.

2B Voice in the Absence of Consensus

Rules of engagement and clear language for areas of agreement and divergence when consensus is incomplete.

DESIRED OUTCOME

A modernized, board adopted consensus protocol — developed ahead of, or concurrently with, the Pillar 1 policy positions — making IPO a recognized source of reasonable, well-reasoned input at the Hill, USPTO, and Executive Branch tables.

3 OPERATIONAL EXCELLENCE

STRATEGIC GOAL

Strengthen the committee governance, board alignment, financial discipline, member value, and leadership pipeline that allow IPO to direct its limited resources to its highest priorities, to sustain its talent and its lane, and to operate with the discipline of a high performing organization.

OBJECTIVES

3A Committee Governance and Board Alignment

3B Member Value Differentiation by Tier

3C Financial Indicators (KPIs)

3D Pipeline Development (Board and Member)

3E Internal AI Infrastructure for IPO and Staff

DESIRED OUTCOME

A rationalized and revitalized committee infrastructure, board approved financial and operational indicators, a differentiated value proposition grounded in tier feedback, a documented next generation pipeline, and internal AI infrastructure that models best practice.

Sequencing: the consensus protocol (Pillar 2) is developed ahead of, or concurrently with, the AI policy positions (Pillar 1) · AI runs through all three pillars