

Regional workshop on tools for competency based learning management

Dates and venue

November 28-30, 2017; MyIPO, Kuala Lumpur, Malaysia

Background

The workshop is linked to discussions and recommendations of the PCT Working Group on patent examiner training management. See the document PCT/WG/10/9 'Coordination of patent examiner training' at http://www.wipo.int/meetings/en/details.jsp?meeting_id=42289 .

A regularly updated compilation of e-learning resources was presented at the tenth session of the PCT WG and is available here: http://www.wipo.int/meetings/en/doc_details.jsp?doc_id=372831 .

Objective

The workshop addresses the development of tools suitable for managing the training of individual patent examiners (competency framework, learning management system) as well as for coordinating the training provided by donor Offices to beneficiary Offices.

It also addresses the use of e-learning facilities for the training of patent examiners and their systematic integration in individual learning curricula, as well as the needs for the further development of such facilities.

The Workshop addresses tools which are suitable both for managing the learning of individual patent examiners and for coordinating the training provided by donor Offices to beneficiary Offices (competency frameworks, learning management systems).

The primary objective of the workshop is to seek collaboration of interested Offices for developing an enhanced competency framework for patent examiners based on the concept described in the above document (for details see below).

The workshop will further address the needs for a learning management system (LMS) for applying the competency framework in planning and tracking participation of individual patent examiners in learning activities and assessing their success of learning.

Available e-learning resources have not yet been fully exploited for the training of examiners (see the survey on patent examiner training presented at the 9th and 10th sessions of the PCT WG). The workshop therefore seeks to promote existing resources, analyse their utility and explore needs for amending or developing further such resources.

Presentations/program items

A detailed workshop program has been prepared as a separate document. The workshop is composed of introductory lectures followed by round table discussions on competency frameworks, learning management systems and e-learning facilities. Some issues to be covered by the round table discussion are indicated in the program. Participants not giving a separate lecture are expected to make short presentations on behalf of their country at the round table discussions. Summaries of the round-table discussions at the workshop will be presented to the PCT WG to inform the further discussion of the PCT WG.

Participants

Up to two experts from each of the following Offices will be invited: DGIP Indonesia, DIP Thailand, IP India, IPOPHL Philippines, IPOS Singapore, NOIP Viet Nam, Patent Office of the Intellectual Property Organization of Pakistan.

Considering the specific objectives of the Workshop and the subject matters that will be addressed, one participant is expected to be an experienced patent examiner who is involved in the training of examiners, or actively engaged in the development of a national or regional examiner training infrastructure, and who would be capable to define skills and knowledge needed to attain certain examiner competencies or to comment on them.

The other participant would be expected to be a manager who is responsible for organizing or managing the training of examiners, for example a human resource expert in charge of staff development, or such expert actively engaged in the development of a national or regional examiner training infrastructure, or being a potential user of learning/training management tools. Alternatively, the second nomination may be the head of the patent department or another experienced patent examiner meeting the said requirements.

WIPO will accept only nominations of experts that have a proven track record in examiner training.

IP-Australia and the European Patent Office as major facilitators for developing training infrastructures in the ASEAN region as well as the ASEAN Secretariat as the manager of the Ideal Patent Examiner Training (IPET) project will make presentations.

The IP5 Offices as major donors of patent examiner training will be informed about the workshop and their participation would be welcome.

Developing a competency framework

Document PCT/WG/10/9 'Coordination of patent examiner training' recommends for suitable competency frameworks 'to be sufficiently comprehensive and detailed to enable:

- Offices to define individual competency models adapted to an individual examiner's job description and the Office's examination policy by selecting appropriate competencies from the generic framework;
- Offices to communicate (individual or institutional) training needs to donors in terms of specified competencies in order to enable donors to respond to training needs more specifically;
- donors to describe content of training activities and define prerequisites for participation in terms of competencies;
- training administrators or managers to assess and record individual prior learning of trainees and identify training gaps;
- training administrators or managers to track and assess the competencies attained by individual examiners through their participation in training activities;
- training organizers or managers to assign training opportunities more effectively by taking into account prior learning and individual training gaps of candidates on the one hand, and content of training activities and prerequisites for participation on the other;
- catering both to Offices conducting regular stand-alone substantive examination and to Offices with limited examination capacities.'

The development of such a competency framework requires input from Offices of different sizes and having varied examination resources, and from examination experts in different fields of technology to assure that various examination policies, all areas of technology, and a wide range of examination tools are covered.

At the workshop, WIPO will present a first draft of a competency framework laying out different areas of learning, exemplifying various skills of various detailedness in each area of learning, and mapping out a hierarchy for ordering the skills. The round table discussions shall analyze, in particular, the proper definition of the areas of learning, the wording of skills, the required level of detailedness, ... and agree on respective recommendations guiding the future work. The workshop will furthermore explore how this draft framework could be developed further through collaboration of interested Offices committing certain staff resources, for example, by means of small groups of experts tackling different areas of learning or different fields of technology, communicating through an e-forum and/or video conferences.

Learning management system

The expression learning management systems (LMS) is a rather generic term and encompasses, for example, systems for the development and delivery of instructional content. This workshop is however not addressing such use.

The workshop rather addresses the use of a LMS as a tool for managing the training of individual examiners or cohorts of examiners over their career or at least the initial training period after recruitment. Such LMS would be used to track individual learning progress in terms of an applicable competency model and identify training gaps. It would be particularly useful for training that is characterized by participation in a variety of different training activities provided by different donors. It should therefore accommodate individual competency models (ICM) as well as blended learning approaches (that is, a variety of types and media of learning). Document PCT/WG/10/9 'Coordination of patent examiner training' suggest that such a system should support the following tasks:

- per examiner:
 - tailoring and recording of ICMs;
 - recording of individual prior knowledge in terms of competencies;
 - (automated) allocation of suitable training opportunities;
 - tracking participation in training activities;
 - conducting and/or recording of assessments of successful learning in terms of competencies;
 - reporting of individual training progress in terms of the applicable ICM;

- per training activity:
 - describing content (learning objectives) and prerequisites for participation in terms of competencies;
 - selecting suitable participants (based on needs, prerequisites) for training activity made available by a donor;
 - success of learning assessment in terms of competencies;

- analytical reporting of various statistics of training activities of potential interest for donor and beneficiary Offices.