



Training Gaps Analysis



Music Publishers



CHRC
Cultural
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du secteur culturel

**Cultural Human Resources Council (CHRC)
Music publishers
Training gaps analysis
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Introduction

In December 2006, the Cultural Human Resources Council (CHRC) issued a Request for Proposal to conduct a Training Gaps Analysis for Canadian Music Publishers (“the RFP”). With recent experience conducting research for the CHRC (having previously completed four other training gaps analyses - automation technicians, record label managers, stage technicians and entertainment riggers), **kisquared** was selected by the CHRC Music Industry Steering Committee to undertake this current study.

The Training Gaps Analysis for music publishers builds upon earlier work done by the Music Publishers’ Expert Working Group (EWG) in compiling a matrix of core competencies that define music publishers’ skill sets. The primary data-gathering instrument used was a survey of music publishers from across Canada, based closely on the music publisher core competencies matrix. Interviewing was conducted in French and English from **kisquared**’s offices in Winnipeg, Manitoba. Additional interviews were conducted using a separate survey with training institutions (for example, colleges and universities) that offer music publishing training.

This study has proceeded with the generous assistance of the CHRC staff (Manon Turcotte, Project Manager, and Susan Annis, Executive Director), the Music Industry Steering Committee (the Steering Committee), and the Music Publishers’ Expert Working Group who assisted in reviewing, refining and pre-testing the data collection instrument and in developing the sample from which interviews were conducted.

Objectives

Three objectives were identified for this study:

- To identify training needs in the competency areas identified in the Music Publishers’ matrix of core competencies;
- To survey the current training offerings across Canada;
- To determine training gaps, defined as areas where existing training offerings do not meet industry needs.

Methodology

The research methods and instruments used in this project (discussed in more detail below) were:

- Music publisher survey
- Secondary research and interviews with training institutions that offer training for music publishers.

Survey

The music publisher survey was developed by **kisquared** in close consultation with the CHRC, and was designed to gather information pertaining to both training needs and offerings. The 99-question equivalent survey was reviewed February 12 – 16, 2007, with two Steering Committee members and a leading music publisher in Quebec, and the resulting feedback was used to make several changes to the questionnaire.

kisquared conducted **144 interviews** in total:

- 12 in French
- 132 in English

The survey incorporated a “snowball” recruit technique to expand the initial sample database and ensure a broadly representative sample of music publishers across Canada.

Secondary research and interviews with training institutions

The secondary research phase consisted of analyzing training offerings. **kisquared's** professional staff contacted formal training institutions (post-secondary institutions, technical colleges, Cégeps, etc.) identified as providing music publishing training. Project staff collected data on curriculum content.

After the music publisher survey was completed, **kisquared** developed an additional questionnaire to measure training offerings. A total of eight telephone interviews were then conducted with senior staff members from institutions offering music publishing training to validate findings about training offerings gained through secondary research, and to identify any training gaps.

Music publisher questionnaire design

Music publisher definition

Given that an individual can perform music publishing tasks as their primary job or as one of a number of tasks, occupational titles vary for those performing the tasks of a music publisher. For this reason, the questionnaire did not rely upon job title alone, but provided a definition of music publisher to identify the target respondent consistently. The wording of the definition used in the questionnaires is given below:

- For the purposes of this study, a music publisher is defined as someone who exploits, administers and protects the repertoires of musical works. A music publisher may organize collaborations between lyricists and publishers and generally promotes and assists the development of an artist's career.
- Dans le but de cette étude, un éditeur ou une éditrice de la musique est reconnu comme celui qui assume l'exploitation, l'administration et la protection des répertoires d'œuvres musicales. Un éditeur ou une éditrice de la musique peut organiser la collaboration avec l'auteur des paroles, aider et promouvoir le développement de carrière des artistes.

Matrix of core competencies converted to measurable skills

For the purposes of questionnaire design, the skill sets contained in the matrix of core competencies were converted to skills language. The skills contained in the questionnaire were reviewed by Steering Committee members, pre-tested with members of the Music Publishers' Expert Working Group and approved by the CHRC prior to fielding.

The survey measures the following 23 *skills*:

- Solicit and assess songs;
- Assess creator's business and earning potential;
- Define and understand the nature of contracts;
- Negotiate contracts;
- Execute contracts;
- Register works;
- Negotiate adaptations and translations;
- Obtain or issue sampling clearances;
- Monitor use of copyright;
- Address infringement issues and resolve disputes;
- Accounting ability to track, collect and pay out royalties;
- Develop and execute a sales strategy to exploit and promote repertoires;

- Provide creative advice and mentoring;
- Contribute to career goal setting and development of the artist;
- Develop sheet and printed music;
- Work with other music publishers to develop policy and advocate for the industry;
- Secure funding and plan finances;
- Manage human resources;
- Comply with business laws, regulations and practices;
- Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems;
- Project management skills;
- Develop digital marketing and distribution opportunities;
- Understand and protect digital rights management.

Reporting

This report is organized under the following headings: *Introduction, Executive summary, Training needs, Chart of competencies – validation, Skills acquisition, Secondary research and interviews with organizations and institutions offering training in Canada, Training gaps analysis, and Respondent profile.* *Appendix A* contains survey “marginals” (response percentages for each question asked in the survey). *Appendix B* contains summary descriptions of available formal training programs specific to music publishing skills across Canada. *Appendix C* contains verbatim responses to the questions below from the music publisher survey:

- Thinking about all the things that music publishers do in their job, are there any skills or skills training we have missed speaking to you about, or that you think may be required in the future?
- What was the name of the institution where you took this [formal training] program? What was the name of the [formal training] program?
- And what skill or skill set did you learn [at a conference or workshop]? Who offered the training?
- When thinking about music publishing training, what would you say are the greatest training needs right now or in the foreseeable future?

Executive summary

Respondent survey profile

- Almost one-half of respondents (45%) consider music publishing a secondary activity that generates less than fifty percent of their total revenue (or income). Twenty-nine percent of respondents are artists who act on their own behalf when it comes to publishing their work.
- Well over one-half (58%) of respondents have been involved in the music publishing industry for over ten years.
- One-quarter (25%) of respondents say they represent 0 to 36 works, one-half (51%) represent between 37 and 500 works, and 24% represent more than 500 works.
- Nearly one-third (32%) of respondents describe their music publishing employment as full-time, 44% describe it as part-time, and another 14% describe music publishing as a sideline activity for them.
- The vast majority (87%) of respondents have not participated in a formal music publishing program at a college or university.

Skills

The survey tested a list of 23 skills, modeled after the CHRC Music Publisher Chart of Competencies. Almost all music publishers use these skills to perform their job:

- Comply with business laws, regulations and practices (96%)
- Define and understand the nature of contracts (92%)
- Register works (89%)

The following skills are used less often:

- Develop sheet and printed music (30%)
- Negotiate adaptations and translations (34%)
- Work with other music publishers to develop policy and advocate for the industry (42%)
- Obtain or issue sampling clearances (43%)
- Most respondents (82% or more) possess each of the skills assessed in the survey. For example,
 - Register works (97%)
 - Solicit and assess songs (97%)
 - Project management skills (96%)
 - Provide creative advice and mentoring (96%)

- Assess creator's business and earning potential (96%)
- Define and understand the nature of contracts (95%)
- Manage human resources (95%)
- Skills that somewhat fewer respondents say they possess are:
 - Obtain or issue sampling clearances (82%)
 - Address infringement issues and resolve disputes (83%)

Skills acquisition

- Self-teaching is the most common means to acquire many of the skills required for music publishers. The skill for which self-teaching is most likely to occur is assessing a creator's business and earning potential (63%).
- On the job training is the second most common means to acquire many of the skills deemed necessary for music publishers. The skill for which on the job training is most likely to occur is negotiating adaptations and translations (56%).
- Formal training is the least common skill acquisition path. The skill for which formal training is most likely to occur is developing sheet and printed music (25%).
- Informal training through conferences, workshops and seminars plays an important role in educating music publishers for some skills, but not others. The skill for which informal training is most likely to occur is understanding and protecting digital rights management (28%).
- Forty-four percent of respondents say they have attended conferences or workshops related to professional development within the past year. The skills most often learned at these conferences and workshops include:
 - General music publishing;
 - Developing and executing a sales strategy to exploit and promote repertoires;
 - Understanding and protecting digital rights management;
 - Synchronization rights; and,
 - Overview of networking.

Chart of core competencies – validation

For most respondents, the CHRC chart of core competencies captures the range of skills required by music publishers. After reviewing the 23-item skills list, respondents were asked if there were any additional skills required that not been mentioned. Sixty-five percent of respondents found the list to be comprehensive or were unable to add more to it; however, the following skills were thought, by some, to be missing:

- New media/new technologies, computer applications/skills, copyright issues, and marketing and sales (4% each)

- Royalties (3%)
- Music skills, networking, and digital music issues (2% each)
- Communication and interpersonal skills, accessing international markets, administration skills, funding and financing, human resource management, print music, and negotiation skills (1% each)

Training offerings

- Institutions offering formal training programs for music publishers that were interviewed in this study include:
 - Durham College (Ontario)
 - Fanshawe College (Ontario)
 - Grant MacEwan College (Alberta)
 - Harris Institute (Ontario)
 - Humber College Institute of Technology and Advanced Learning (Ontario)
 - International Academy of Design and Technology (Ontario)
 - Metalworks Institute of Sound and Music Production (Ontario)
 - Trebas Institute (Ontario)
- Most skills under study are taught by a majority of the eight organizations and institutions interviewed. Negotiating adaptations and translations, administration skills, managing human resources and working with other publishers to develop policy and advocate for the industry are skills taught by the smallest number of organizations and institutions.
- When asked about the greatest training need right now or in the foreseeable future, respondents cited the following:
 - More training in all aspects of music publishing
 - Keeping up on new technology
 - Understanding of copyright and how to protect it
 - Rights management and licensing opportunities
 - Creative foundation for business applications
 - Being aware of new or changing legislation
 - Digital rights
- Respondents from these training organizations and institutions say the lack of funding (50%), lack of demand for music publisher training (25%), and the structure of the program (25%) prevents them from offering more music publishing training.
- Provincial music associations and music publishing associations offering informal training for music publishers that were interviewed for this study include:

- Alberta Recording Industry Association
- Association professionnels de l'édition musicale
- Association québécoise de l'industrie du disque, du spectacle et de la vidéo
- Manitoba Audio Recording Industry Association
- Music BC
- Music NB
- Music Nova Scotia
- Music and Film in Motion
- The following skills are taught by all eight associations interviewed:
 - Define and understand the nature of contracts
 - Execute contracts
 - Register works
 - Understand and protect digital rights management
- The skill of negotiating adaptations and translations is taught by only one of the associations interviewed. The skill of developing sheet and printed music is taught by only two of the eight associations surveyed.

Skills gap analysis

- Although the percentage that already “has” a given skill always greatly outweighs those who still “need” that skill, some noteworthy gaps exist between required and available skills. The largest gaps appear in relation to:
 - Obtaining or issuing sampling clearances (18%)
 - Addressing infringement issues and resolving disputes (17%)
 - Understanding and protecting digital rights management (16%)
 - Negotiating adaptations and translations (15%)
 - Developing sheet and printed music (15%)
- The smallest skills gaps appear in relation to:
 - Registering works (3%)
 - Soliciting and assessing songs (3%)
 - Project management skills (4%)
 - Providing creative advice and mentoring (4%)
 - Assessing a creator’s business and earning potential (4%)

Recommendations

- Decisions about future training offerings and program development must first and foremost be understood within the context of who music publishers are. As this study clearly shows, music publishers have been doing their job for a long time (nearly 60% have been publishing for over ten years), the vast majority (87%) have never participated in a formal training program, and approximately one-third of those who do publish are artists who self-publish.
- Music publishers expect future training to occur through informal mechanisms, and a significant proportion currently take advantage of existing informal training offerings (44% have attended a conference or workshop related to music publishing in the past year).
- Today, Canada's music publishing training needs focus primarily in the areas of digital rights management, changing legislation, copyright issues, new technologies, and new media. The common theme tying these skills together is that they are all fast-moving and evolving targets. Like the entire music industry, music publishing has undergone and will continue to undergo many changes, particularly related to digital technology and new media.
- These topics are best suited for informal training offerings through associations, for example, because associations can develop curriculum "on the fly" and deliver it regionally across Canada to publishers (and artists), and are accessible in terms of both time and money. In fact, music publishers do not expect curriculum delivery through formal training institutions. The praxis to date has been skill acquisition through informal avenues like music associations and independent workshops.
- Given that the current Music Publisher Chart of Competencies represents a very accurate and comprehensive picture of what skills music publishers both need and currently possess, future curriculum should focus on this chart, and use it as a starting point to ensure their curriculum is complete. Additionally, this report goes one step further and identifies the other skills that are related to the digital environment, and highlights the need for training in these areas as well.

Skills

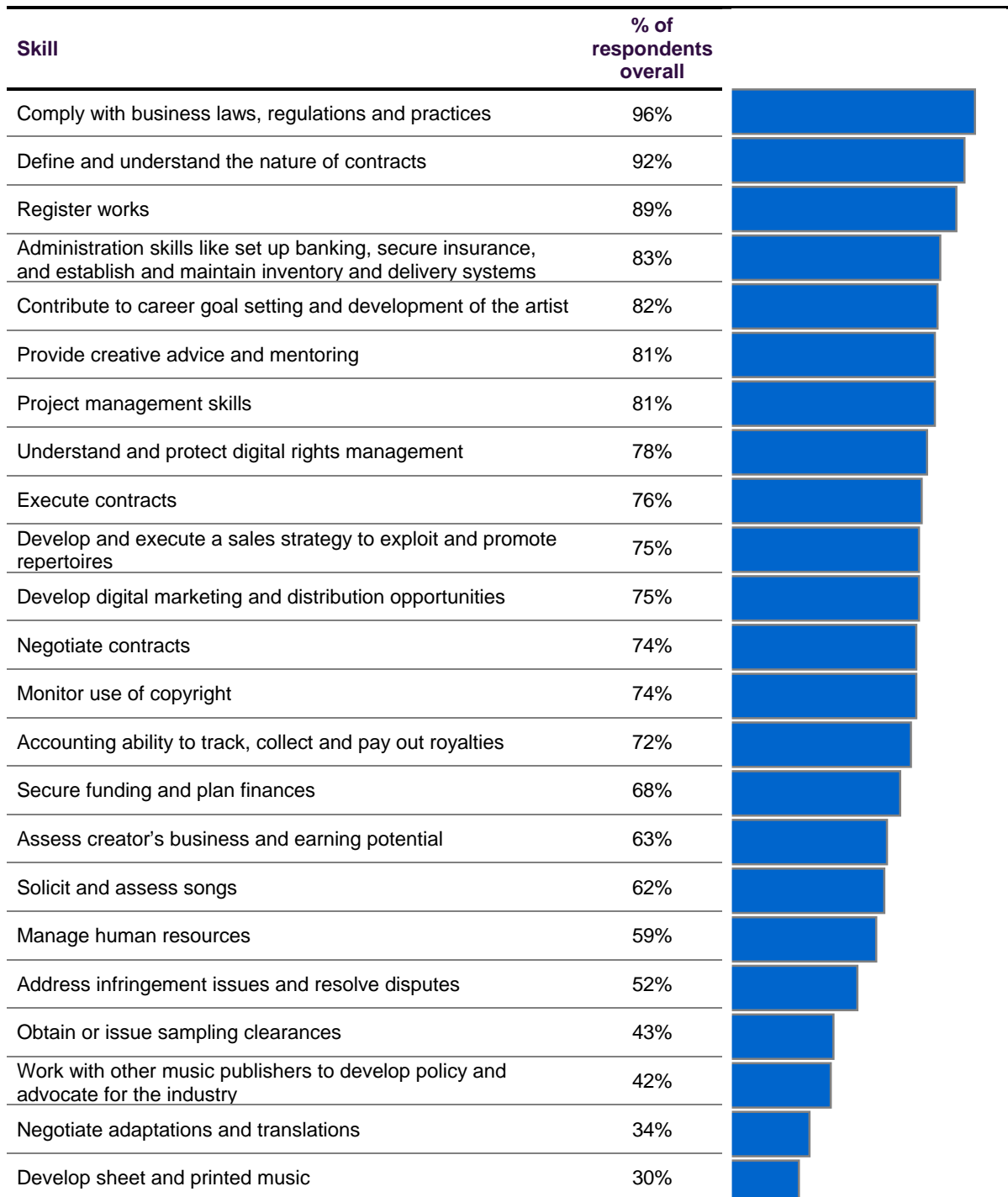
Music publishers were led orally through a 23-item skills series and were asked whether each skill was *required* then whether they *currently have* or *need to acquire* it.

Skills required for position

Figure 1, below, illustrates the proportion of respondents that say each skill is required of music publishers.

- Two out of the 23 skills listed are required for over 90% of music publishers, with the most-required skills being: comply with business laws, regulations and practices (96%), and define and understand the nature of contracts (92%). It is interesting to note that these two most-required skills are related to legal and regulatory frameworks.
- The least required skills, by far, are: develop sheet and printed music (30%), and negotiate adaptations and translations (34%).
- Digital music publishing skills are required by approximately three-quarters of respondents: understand and protect digital rights management (78%) and develop digital marketing and distribution opportunities (75%).

Figure 1 SKILLS REQUIRED FOR POSITION




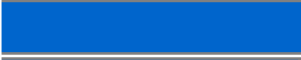








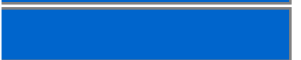












Note: Responses of “don’t know / refused” have been excluded.

Current skills

Figure 2, below, represents the range of skills already present within the music publishing industry.

- Nearly all music publishers (97%) in this study have the skills to register songs, and solicit and assess songs.
- Fewer music publishers, although still a significant proportion, have the skills to obtain or issue sampling clearances (82%) or to address infringement issues and resolve disputes (83%).
- Although not all skills are required by music publishers to perform their jobs (see Figure 1 above), at least 82% of respondents nevertheless possess these skills. For example, the skill of obtaining or issuing sampling clearances is required by only 43% of music publishers to perform their jobs, but 82% of music publishers have this skill (see Figure 2 below).

Figure 2 CURRENT SKILLS

Skill	% of respondents overall	
Register works	97%	
Solicit and assess songs	97%	
Project management skills	96%	
Provide creative advice and mentoring	96%	
Assess creator's business and earning potential	96%	
Define and understand the nature of contracts	95%	
Manage human resources	95%	
Comply with business laws, regulations and practices	94%	
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	94%	
Contribute to career goal setting and development of the artist	94%	
Negotiate contracts	93%	
Execute contracts	93%	
Develop and execute a sales strategy to exploit and promote repertoires	93%	
Secure funding and plan finances	92%	
Monitor use of copyright	91%	
Accounting ability to track, collect and pay out royalties	89%	
Develop digital marketing and distribution opportunities	87%	
Work with other music publishers to develop policy and advocate for the industry	87%	
Develop sheet and printed music	85%	
Negotiate adaptations and translations	85%	
Understand and protect digital rights management	84%	
Address infringement issues and resolve disputes	83%	
Obtain or issue sampling clearances	82%	

Note: Responses of “don’t know / refused” have been excluded.

Skill gaps

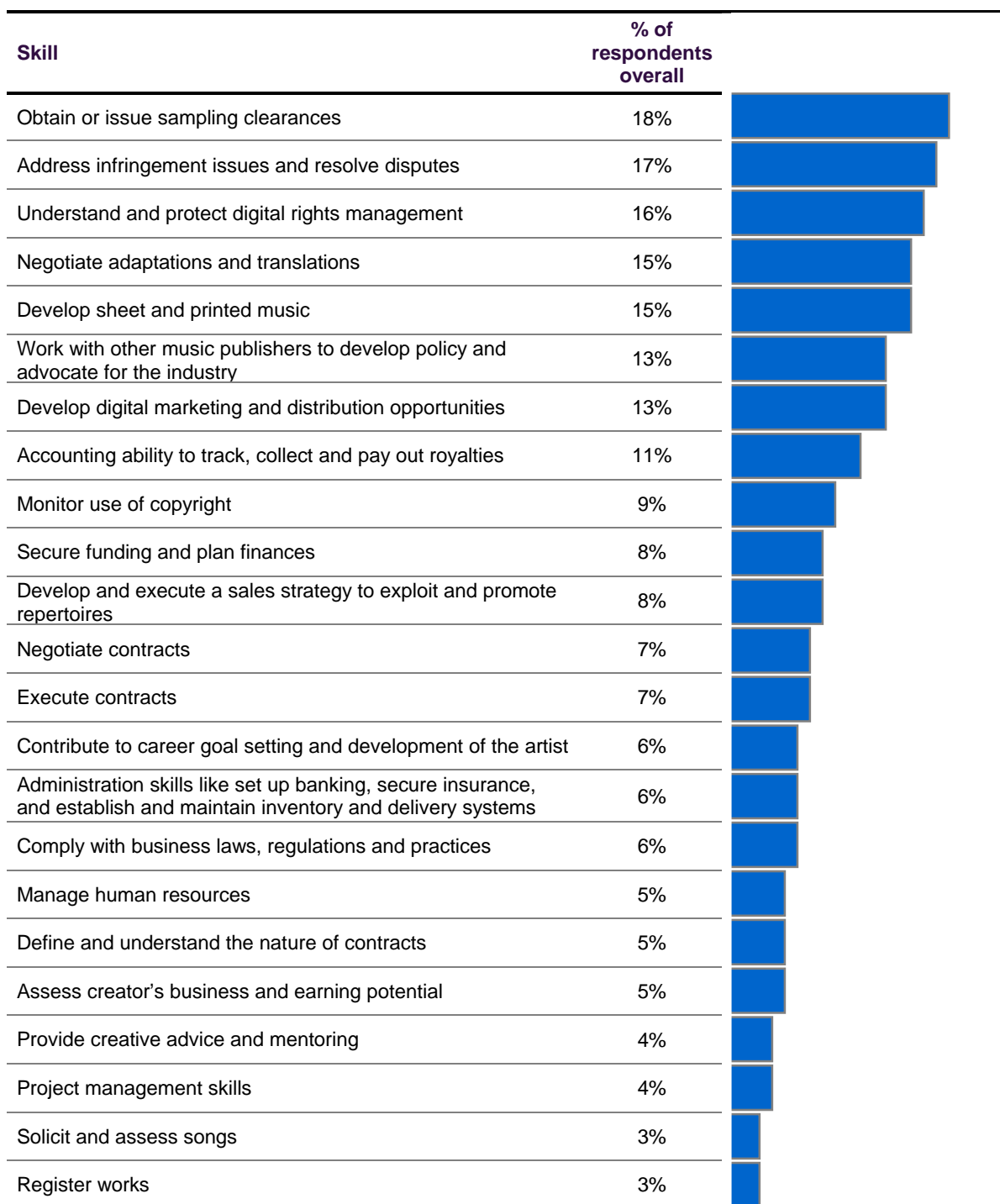
Out of all skills tested, music publishers were asked to indicate what skills they do not have, and need to acquire. Figure 3 illustrates current skill gaps.

- The largest gaps exist in the areas of: obtaining or issuing sampling clearances (18%), addressing infringement issues and resolve disputes (17%), and understanding and protecting digital rights management (16%).
- The smallest gaps exist in the areas of: soliciting and assessing songs (3%) and registering works (3%).

Based on cross-tabulations, the following observations can be made about skill gaps.

- Professional music publishers are more likely than average to say they need the following skills:
 - Soliciting and assessing songs;
 - Assessing creator's business and earning potential;
 - Obtaining or issuing sampling clearances;
 - Addressing infringement issues and resolving disputes; and,
 - Accounting ability to track, collect and pay out royalties;
- Music publishers representing between 37 and 500 works are more likely than average to say they need this skill:
 - Executing contracts.
- Music publishers representing between 501 and 1,000,000 works are more likely than average to say they need these skills:
 - Negotiating adaptations and translations;
 - Monitoring use of copyright;
 - Addressing infringement issues and resolving disputes; and,
 - Accounting ability to track, collect and pay out royalties.

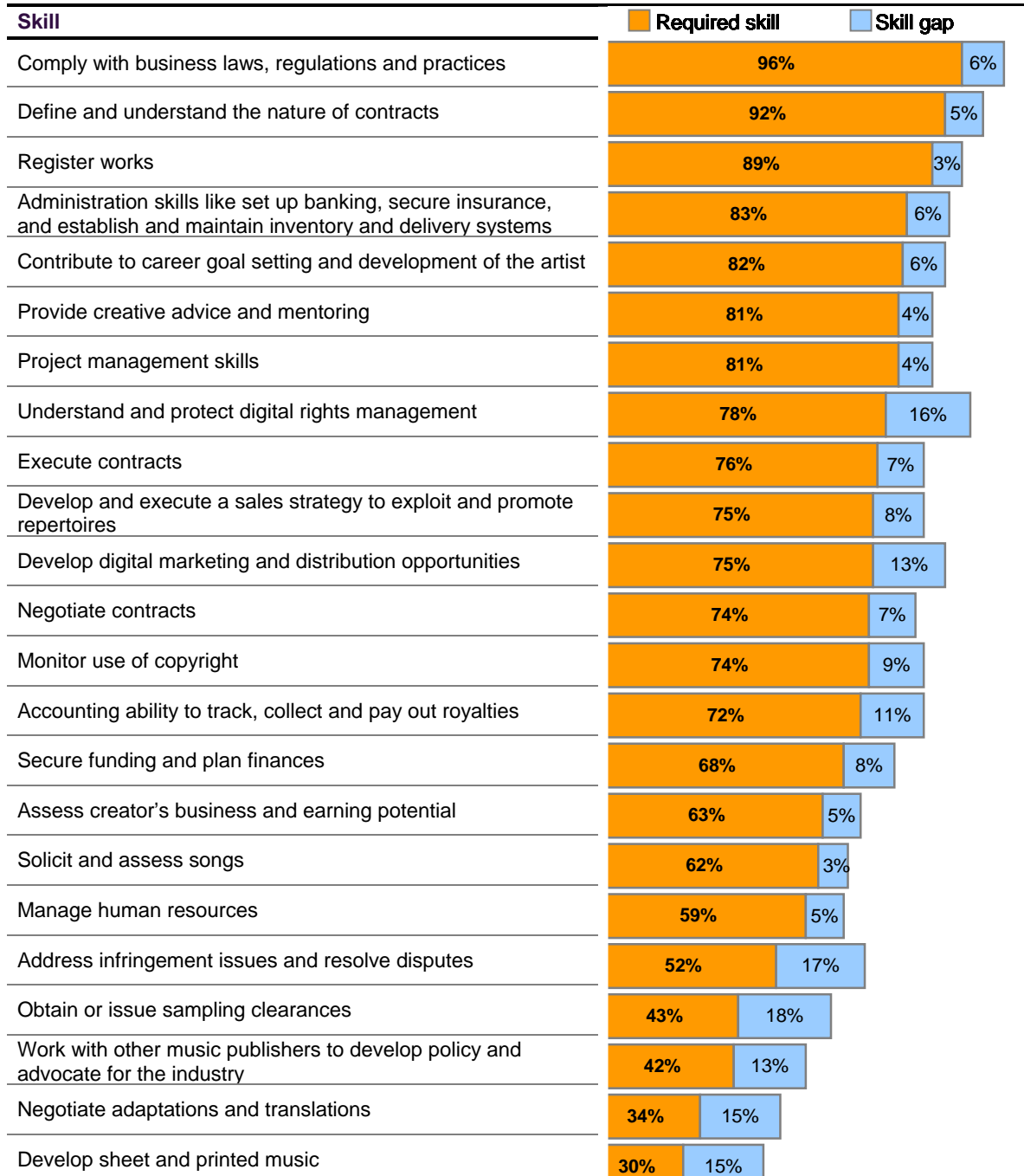
Figure 3 SKILL GAPS



Note: Responses of “don’t know / refused” have been excluded.

Figure 4, below, shows the skills required by music publishers along with associated skills gaps. Comparison of the two reveals that, in general, the skill gaps are slightly larger amongst the least-required skills, whereas the skill gaps are slightly smaller amongst those most required.

Figure 4 SKILLS REQUIRED VS. SKILL GAPS



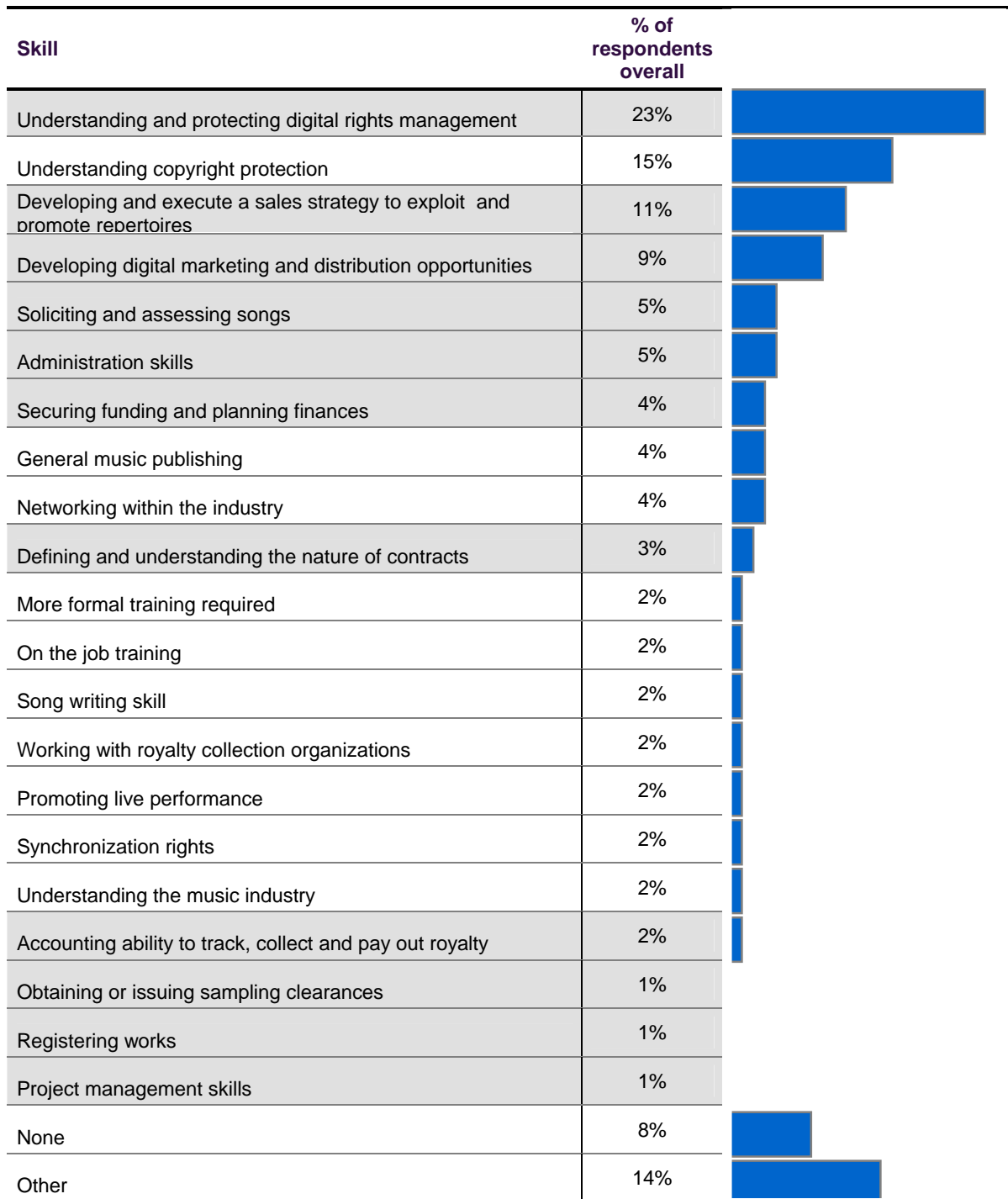
Note: Skill gaps calculated as per Figure 3.

Perceived training gaps

Respondents were asked to state what they see as the most significant training gaps for music publishers now or in the future. Figure 5 presents these findings. Complete verbatim responses to this question are provided in *Appendix C*.

- Two of the top three training gaps relate to digital music publishing. One in five respondents (23%) identify digital rights management, 15% identify understanding copyright protection, and about one in ten (9%) identify digital marketing and distribution opportunities as top training gaps.

Figure 5 TRAINING GAPS IDENTIFIED BY MUSIC PUBLISHERS



Note: Responses of “don’t know / refused” have been excluded. Percentages may exceed 100% because multiple responses were accepted. Grey shading indicates skills tested in the survey.

Chart of competencies – validation

The 23 skills assessed by the music publisher survey were based closely on the matrix of core competencies developed by the CHRC. To objectively validate this chart of competencies, respondents were asked if there are any additional skills needed for the job of music publishers that were not covered in the survey, or may be required in future. Results are shown in Figure 6 below.

For most music publishers, the CHRC Music Publishers Chart of Competencies reflects the range of required job skills. Respondents were further asked if any additional skills are required that were not mentioned. A majority of respondents (65%) agree that the tested list is comprehensive, while others identified these skills as “missing”:

- New media/new technologies, computer applications/skills, copyright issues, and marketing and sales (4% each, for a total of 16%)
- Royalties (3%)
- Music skills, networking, and digital music issues (2% each, for total of 6%)
- Communication and interpersonal skills, accessing international markets, administration skills, funding and financing, human resource management, print music, and negotiation skills (1% each, for a total of 7%)
- Another 10% of responses are not specific skills that can be categorized

It should be noted that although the majority of the skills listed above as “missing” were actually tested in the survey, they obviously remain top of mind among some respondents.

However, when compared to the original Music Publishers Chart of Competencies, the only skills identified as “missing” are new media/new technologies, music skills and digital music issues.

During the survey design phase, members of the Steering Committee and Expert Working Group were consulted and it was decided that the following skills should be added to the questionnaire even though they are not covered by the Chart of Competencies:

- Develop digital marketing and distribution opportunities
- Understand and protect digital rights management

Figure 6 PERTINENT SKILLS NOT COVERED BY SURVEY

Skill	%
None	65%
New media/new technologies	4%
Computer applications/skills	4%
Copyright issues	4%
Marketing and sales	4%
Royalties	3%
Music skills	2%
Networking	2%
Digital music issues	2%
Communication and interpersonal skills	1%
Accessing international markets	1%
Administration skills	1%
Funding and financing	1%
Human resource management	1%
Print music	1%
Negotiation skills	1%
Other	10%

Note: Responses of “don’t know / refused” have been excluded. Percentages exceed 100% because multiple percentages were accepted.

Skills acquisition

Respondents who said they possess a music publishing skill or need to acquire it were asked where they acquired the skill or where they expect to acquire it in the future. Responses were grouped into four categories: “self-taught,” “learn on the job,” “informal / conference / workshops,” and “formal training”. It should be noted that there is likely some overlap between self-teaching and on the job learning as the method of acquiring a skill on the job is often accomplished through self-teaching rather than a formal on the job training process.

Figure 7 below shows the method or expected method of skill acquisition for each skill tested.

Figure 7 WHERE SKILLS WERE ACQUIRED OR ARE EXPECTED TO BE ACQUIRED

Skill	Self-taught	On the job	Informal / conference / workshop	Formal
Assess creator’s business and earning potential	63%	48%	18%	10%
Solicit and assess songs	62%	45%	23%	10%
Provide creative advice and mentoring	59%	52%	14%	8%
Contribute to career goal setting and development of the artist	55%	53%	17%	6%
Register works	55%	48%	20%	11%
Develop digital marketing and distribution opportunities	54%	52%	21%	7%
Negotiate contracts	53%	50%	18%	17%
Execute contracts	51%	50%	17%	19%
Work with other music publishers to develop policy and advocate for the industry	51%	41%	20%	14%
Define and understand the nature of contracts	51%	49%	19%	22%
Project management skills	50%	51%	15%	20%
Develop and execute a sales strategy to exploit and promote repertoires	50%	54%	18%	15%
Negotiate adaptations and translations	49%	56%	22%	13%
Monitor use of copyright	49%	51%	18%	12%
Comply with business laws, regulations and practices	49%	49%	12%	16%
Secure funding and plan finances	48%	53%	21%	15%
Manage human resources	48%	54%	16%	19%
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	47%	50%	10%	21%
Obtain or issue sampling clearances	46%	49%	20%	13%
Understand and protect digital rights management	46%	48%	28%	9%
Develop sheet and printed music	45%	38%	18%	25%
Accounting ability to track, collect and pay out royalties	45%	48%	16%	22%
Address infringement issues and resolve disputes	44%	49%	20%	20%

Note: Responses of “don’t know / refused” have been excluded. Percentages exceed 100% because multiple percentages were accepted.

Self-teaching

Self-teaching, through reading books or journals for example, is the most common method of learning for music publishers. Over fifty percent of music publishers surveyed indicated self-teaching as the method by which they acquired or expect to acquire the following skills:

- Assess creator's business and earning potential;
- Solicit and assess songs;
- Provide creative advice and mentoring;
- Register works;
- Contribute to career goal setting and development of the artist;
- Negotiate contracts;
- Develop digital marketing and distribution opportunities;
- Define and understand the nature of contracts; and,
- Execute contracts.

Based on cross-tabulations, the following observations can be made.

- Those music publishers who represent 500 or fewer works (small- and medium-scale representatives) are more likely to cite self-teaching as the method by which they acquired or expect to acquire the following skill:
 - Complying with business laws, regulations and practices.

Learning on the job

On the job learning is a frequently cited training path for music publishers to acquire job skills. Some skills are more likely to be learned on the job (for example, managing human resources) than others (for example, working with other music publishers to develop policy and advocate for the industry).

Over fifty percent of music publishers surveyed cited on the job learning as the method by which they acquired or expect to acquire the following skills:

- Manage human resources;
- Develop and execute a sales strategy to exploit and promote repertoires;
- Negotiate adaptations and translations;
- Contribute to career goal setting and development of the artist; and
- Project management skills.

Based on cross-tabulations, the following observations can be made.

- Those music publishers who represent 501 to 1,000,000 works are much more likely to have acquired or expect to acquire the skill of securing funding and planning finances while on the job.

Informal training

Informal training through workshops, conferences and seminars, is not a very common training path for music publishers to gain certain skills. The skill most likely to be learned through informal training is understanding and protecting digital rights management (27%). The skills least likely to be acquired through informal training are administration skills (10%) and compliance with business laws, regulations and practices (12%).

Based on cross-tabulations, the following observations can be made:

- Those who represent between 37 and 500 works (medium-scale music publishers) are more likely to have attended some type of informal training in the past year than those who are small- or large-scale music publishers.

Formal training

Formal training at a college or university is not a particularly common method of acquiring music publishing skills. Of those surveyed, only 13% of music publishers have participated in a formal training program.

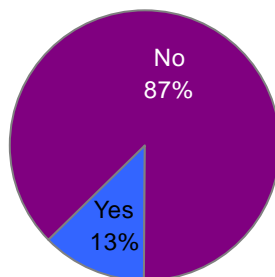
Based on cross-tabulations, the following observations can be made:

- Those who consider music publishing a primary or secondary activity are more likely to have acquired or expect to acquire for the following skills through formal training than those who consider themselves artists who publish their own work:
 - Defining and understanding contracts;
 - Executing contracts.

Respondent formal training

Respondents were asked if they ever participated in a formal training program for music publishing, such as a university or college program. As Figure 8 illustrates below, only 13% of respondents indicate that they participated in a formal training program that offers training in music publishing. Participation in formal training for music publishers

Figure 8 PARTICIPATION IN FORMAL TRAINING FOR MUSIC PUBLISHERS



Of those music publishers who participated in formal training (13%), nearly one-half (46%) attended a college while almost one-fifth (18%) attended a university. Figure 9 shows where formal training for music publishers was undertaken.

Figure 9 WHERE FORMAL TRAINING FOR MUSIC PUBLISHERS WAS RECEIVED

Skills	%
Fanshawe College	22%
Harris Institute	11%
Association des professionnels de l'édition musicale (APEM)	11%
Selkirk College	6%
Simon Fraser University	6%
Grant MacEwan College	6%
Okanagan College	6%
York University	6%
Ryerson University	6%
Toronto Film School	6%
Institute national de l'image et du son	6%
College Vanier	6%
Berklee College of Music	6%
University of California, Los Angeles	6%
New York University	6%
Association québécoise de l'industrie du disque, du spectacle et de la vidéo (ADISQ)	6%

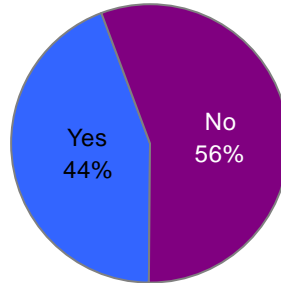
Note: Percentages exceed 100% because multiple responses were accepted.

Respondent professional development

kisquared asked respondents if they attended any conferences or workshops within the past year related to professional development as a music publisher. Figure 10 below shows that 44% of respondents overall have attended conferences or workshops within the past year.

Cross-tabulations reveal that medium-scale music publishers (representing 37 to 500 works) are those most likely to have attended a conference or workshop in the past year.

Figure 10 CONFERENCE OR WORKSHOP ATTENDANCE – PAST YEAR



Respondents who attended a conference or workshop in the past year were asked what skill or skill set it pertained to (see Figure 11). Verbatim responses to this question are provided in *Appendix C*.

The topics most often learned at such conferences or workshops are: general music publishing (14%), developing and executing a sales strategy to exploit and promote repertoires (13%), and understanding and protecting digital rights management, synchronization rights and overview of networking (11%).

Figure 11 PROFESSIONAL DEVELOPMENT – SKILL SET

Skills	%
General music publishing	14%
Developing and executing a sales strategy to exploit and promote repertoires	13%
Understanding and protecting digital rights management	11%
Synchronization rights	11%
Overview of networking	11%
Defining and understanding the nature of contracts	8%
Developing digital marketing and distribution opportunities	6%
Copyright management	6%
Soliciting and assessing songs	5%
Industry trends and developments	5%
Accounting ability to track, collect and pay out royalties	3%
Securing funding and planning finances	3%
New digital technology	3%
Song writing skill	3%
Management skill	3%
New media	3%
Addressing infringement issues and resolve disputes	2%
None	6%
Other	11%

Note: Percentages exceed 100% because multiple responses were accepted.

Conference and workshop attendees were also asked who offered this professional development training (see Figure 12). Verbatim responses are provided in *Appendix C*.

The three most frequently cited *organizations* offering professional development training are the Canadian Music Publishers Association (16%), Music and Film in Motion (12%), and Society of Composers, Authors and Music Publishers of Canada (11%).

Figure 12 PROFESSIONAL DEVELOPMENT – WHO OFFERED THE TRAINING?

Organization	%
Canadian Music Publishers Association	16%
Music and Film in Motion	12%
Society of Composers, Authors and Music Publishers of Canada (SOCAN)	11%
Canada Country Music Association	9%
Nashville Songwriter Association International	6%
South by Southwest	5%
Canadian Music Week	5%
East Coast Music Awards	5%
Western Canadian Music Awards	5%
Association des professionnels de l'édition musicale (APEM)	4%
Manitoba Audio Recording Industry Association	4%
Canadian Recording Industry Association	2%
Music Industry Association of Canada	2%
North by Northwest	2%
Canadian Heritage	2%
Ontario Council of Folk Festivals	2%
Guild of Canadian Film Composers	2%
Songwriters Association of Canada	2%
Future of Music	2%
Association québécoise de l'industrie du disque, du spectacle et de la vidéo (ADISQ)	2%
American Society of Composers, Authors and Publishers	2%
Trebas Institute	2%
Cultural Human Resources Council	2%
National Folk Alliance	2%
Toronto Blues Society	2%
Other	6%

Note: Responses of “don’t know / refused” have been excluded. Percentages exceed 100% because multiple responses were accepted.

Training offerings

Eight interviews were conducted with *formal training institutions* (universities and colleges) about their training offerings for music publishers. Wherever possible, these interviews were conducted with senior staff members familiar with the content of the programs offered at their institution or organization. These findings are intended to provide a very general overview of training offerings, and do not evaluate the quality and type of education offered (e.g., practically-oriented vs. theoretically-based).

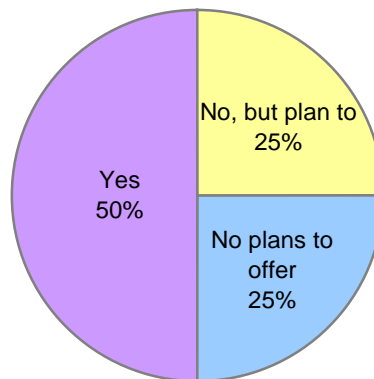
Formal training

Co-op placements and internships

One-half of training institutions surveyed currently offer co-op placements or internship opportunities for music publishers. Of those that do *not* currently offer such opportunities, one-half say they are planning to offer co-op placements or internships in future (see Figure 13).

Figure 13 CO-OP PLACEMENTS AND INTERNSHIPS

Do you offer co-ops or internships for your music publishing students?



Curriculum content

Senior staff members at training organizations and institutions were then asked whether their program offered training for each of the 23 skills examined in the music publisher survey, and if so, approximately how many hours are dedicated to its coverage. Figure 14 below lists each skill with the number of organizations and institutions that offer training in that skill, and the average number of hours dedicated to its teaching.

The average number of hours provides an *estimate* of the time devoted to learning each skill across all organizations and institutions. Caution must be exercised when reviewing these averages, for two reasons. First, institutions say that the actual number of training hours for each skill can vary greatly from year to year as the curriculum frequently changes. Second, respondents had difficulty in quantifying the number of hours dedicated to a certain skill, especially as instructors can change the curriculum each time a course is offered.

Figure 14 reveals that six of the 23 required skills are taught by all eight of the training institutions interviewed including skills related to contracts (defining and understanding, negotiating, and executing), registering works, developing and executing a sales strategy to exploit and promote repertoires and contributing to career goal setting and development of the artist, with varying number of hours dedicated to teaching these skills. The skill of negotiating adaptations and translations is only taught at three institutions with an average of five hours allocated to teaching it.

Figure 14 CURRICULUM CONTENT

Skills	Count of institutions / organizations offering (of 8)	Average number of hours dedicated to covering skill
Define and understand the nature of contracts	8	33
Negotiate contracts	8	21
Execute contracts	8	21
Register works	8	13
Develop and execute a sales strategy to exploit and promote repertoires	8	13
Contribute to career goal setting and development of the artist	8	24
Solicit and assess songs	7	11
Assess creator's business and earning potential	7	28
Monitor use of copyright	7	15
Accounting ability to track, collect and pay out royalties	7	13
Provide creative advice and mentoring	7	28
Develop sheet and printed music	7	10
Secure funding and plan finances	7	11
Develop digital marketing and distribution opportunities	7	22
Obtain or issue sampling clearances	6	6
Address infringement issues and resolve disputes	6	11
Comply with business laws, regulations and practices	6	19
Project management skills	6	40
Understand and protect digital rights management	6	11
Work with other music publishers to develop policy and advocate for the industry	5	13
Manage human resources	5	10
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	4	19
Negotiate adaptations and translations	3	5

Note: The average hours are approximations only and may vary from year to year.

Figure 15 below summarizes formal training offerings for each skill based on surveys with the institutions.

Figure 15 FORMAL SKILLS TRAINING OFFERED

Skill	Grant MacEwan College	Harris Institute	Humber College	International Academy of Design and Technology	Metalworks Institute of Sound and Music Production	Trebas Institute	Fanshawe College	Durham College
Solicit and assess songs	✓	✓	✓	✓	✓		✓	✓
Assess creator's business and earning potential	✓	✓	✓	✓	✓		✓	✓
Define and understand the nature of contracts	✓	✓	✓	✓	✓	✓	✓	✓
Negotiate contracts	✓	✓	✓	✓	✓	✓	✓	✓
Execute contracts	✓	✓	✓	✓	✓	✓	✓	✓
Register works	✓	✓	✓	✓	✓	✓	✓	✓
Negotiate adaptations and translations	✓			✓				✓
Obtain or issue sampling clearances	✓	✓	✓	✓		✓		✓
Monitor use of copyright		✓	✓	✓	✓	✓	✓	✓
Address infringement issues and resolve disputes		✓	✓	✓		✓	✓	✓
Accounting ability to track, collect and pay out royalties		✓	✓	✓	✓	✓	✓	✓
Develop and execute a sales strategy to exploit and promote repertoires	✓	✓	✓	✓	✓	✓	✓	✓
Provide creative advice and mentoring	✓	✓	✓	✓	✓		✓	✓
Contribute to career goal setting and development of the artist	✓		✓	✓	✓	✓	✓	✓
Develop sheet and printed music	✓		✓	✓		✓	✓	✓
Work with other music publishers to develop policy and advocate for the industry				✓	✓		✓	✓
Secure funding and plan finances	✓		✓	✓	✓		✓	✓

Formal skills training offered, continued...

Skill	Grant MacEwan College	Harris Institute	Humber College	International Academy of Design and Technology	Metalworks Institute of Sound and Music Production	Trebas Institute	Fanshawe College	Durham College
Manage human resources			✓	✓			✓	✓
Comply with business laws, regulations and practices				✓	✓	✓	✓	✓
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	✓			✓				✓
Project management skills			✓	✓	✓		✓	✓
Develop digital marketing and distribution opportunities			✓	✓	✓	✓	✓	✓
Understand and protect digital rights management			✓	✓	✓		✓	✓

Training gaps

Of the eight training institutions surveyed, five provided a response when asked what the greatest training need was for music publishers now or in the foreseeable future. The greatest training needs cited by institutions include: copyright and how to protect it; keeping up on technology; the understanding of copyright law; rights management and licensing opportunities; a creative foundation for business applications; being aware of new and changing legislation; digital rights; and, more training in *all* aspects of music publishing.

Training barriers

Respondents were then asked whether any barriers prevent their program from offering more music publisher training. The biggest barriers to offering more training for music publishers are lack of funding (cited by two respondents) and a lack of demand for music publisher training.

Respondent skills acquired through formal training

Figure 16 to Figure 18 show the skills that music publishers surveyed who participated in a formal training program currently possess.

Figure 16 BRITISH COLUMBIA AND ALBERTA – SKILLS ACQUIRED THROUGH FORMAL TRAINING

Skill	Selkirk College	Simon Fraser University	Grant MacEwan College
Solicit and assess songs			
Assess creator's business and earning potential			
Define and understand the nature of contracts	✓	✓	✓
Negotiate contracts	✓		
Execute contracts	✓	✓	
Register works	✓	✓	
Negotiate adaptations and translations			
Obtain or issue sampling clearances		✓	
Monitor use of copyright		✓	
Address infringement issues and resolve disputes	✓	✓	
Accounting ability to track, collect and pay out royalties		✓	
Develop and execute a sales strategy to exploit and promote repertoires	✓	✓	
Provide creative advice and mentoring	✓	✓	
Contribute to career goal setting and development of the artist	✓	✓	
Develop sheet and printed music			
Work with other music publishers to develop policy and advocate for the industry		✓	
Secure funding and plan finances	✓	✓	
Manage human resources	✓	✓	✓
Comply with business laws, regulations and practices	✓	✓	✓
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	✓	✓	✓
Project management skills	✓	✓	✓
Develop digital marketing and distribution opportunities			
Understand and protect digital rights management	✓	✓	

Figure 17 ONTARIO AND U.S. – SKILLS ACQUIRED THROUGH FORMAL TRAINING

Skill	York University	Fanshawe College	Harris Institute	Berklee College of Music
Solicit and assess songs		✓		✓
Assess creator's business and earning potential		✓	✓	
Define and understand the nature of contracts	✓	✓	✓	✓
Negotiate contracts	✓	✓	✓	
Execute contracts	✓	✓	✓	✓
Register works	✓	✓	✓	
Negotiate adaptations and translations	✓	✓		
Obtain or issue sampling clearances	✓	✓	✓	
Monitor use of copyright	✓	✓		
Address infringement issues and resolve disputes	✓	✓	✓	
Accounting ability to track, collect and pay out royalties	✓	✓	✓	
Develop and execute a sales strategy to exploit and promote repertoires		✓	✓	
Provide creative advice and mentoring		✓		
Contribute to career goal setting and development of the artist		✓		
Develop sheet and printed music		✓		
Work with other music publishers to develop policy and advocate for the industry		✓	✓	
Secure funding and plan finances	✓	✓	✓	
Manage human resources		✓	✓	
Comply with business laws, regulations and practices	✓	✓	✓	
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	✓	✓	✓	✓
Project management skills	✓	✓	✓	✓
Develop digital marketing and distribution opportunities		✓		
Understand and protect digital rights management	✓	✓		

Figure 18 QUEBEC - SKILLS ACQUIRED THROUGH FORMAL TRAINING

	Vanier College	APEM*	ADISQ*
Solicit and assess songs	✓	✓	
Assess creator's business and earning potential	✓		
Define and understand the nature of contracts	✓	✓	✓
Negotiate contracts	✓		
Execute contracts	✓		
Register works	✓		
Negotiate adaptations and translations	✓		
Obtain or issue sampling clearances	✓		
Monitor use of copyright	✓		✓
Address infringement issues and resolve disputes	✓		
Accounting ability to track, collect and pay out royalties	✓	✓	
Develop and execute a sales strategy to exploit and promote repertoires	✓		
Provide creative advice and mentoring	✓		
Contribute to career goal setting and development of the artist	✓		
Develop sheet and printed music	✓		
Work with other music publishers to develop policy and advocate for the industry	✓		
Secure funding and plan finances	✓		
Manage human resources	✓		
Comply with business laws, regulations and practices	✓		
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	✓		
Project management skills	✓		
Develop digital marketing and distribution opportunities	✓		
Understand and protect digital rights management	✓		

Note: APEM is the Association des professionnels de l'édition musicale; ADISQ is the Association québécoise de l'industrie du disque, du spectacle et de la vidéo.

***Although APEM and ADISQ are not formal training programs (university or college), respondents named these organizations when asked where they received formal music publisher training.**

Informal training

Interviews were conducted with eight provincial music associations and music publishing associations to determine the skills for which training is offered. Figure 19 and Figure 20 summarize the informal training offerings from the provincial music associations and music publishing associations interviewed. The associations surveyed offer training for between 11 and 21 skills in the 23 item skill list.

These provincial associations normally offer training in the form of workshops over a period of a few hours, or in some cases, a few days. One exception is the Association des professionnels de l'édition musicale (APEM) in Quebec. APEM offers an annual music publishing training program in which courses are taught once a week covering a range of music publisher skills.

Of the eight associations interviewed, five of them indicated that the greatest barrier to offering more training of interest to music publishers is not having enough funding. The two associations we spoke to from the Maritimes (New Brunswick and Nova Scotia), also mentioned that they need to have funding to bring in people to teach the workshops.

Figure 19 SKILLS OFFERED BY PROVINCIAL MUSIC ASSOCIATIONS AND MUSIC PUBLISHING ASSOCIATIONS (1 OF 2)

Skill	Manitoba Audio Recording Industry Association	Alberta Recording Industry Association	Music NB	Music Nova Scotia
Solicit and assess songs		✓	✓	✓
Assess creator's business and earning potential	✓		✓	✓
Define and understand the nature of contracts	✓	✓	✓	✓
Negotiate contracts	✓	✓	✓	
Execute contracts	✓	✓	✓	✓
Register works	✓	✓	✓	✓
Negotiate adaptations and translations				
Obtain or issue sampling clearances	✓		✓	✓
Monitor use of copyright	✓	✓	✓	✓
Address infringement issues and resolve disputes		✓	✓	✓
Accounting ability to track, collect and pay out royalties		✓	✓	✓
Develop and execute a sales strategy to exploit and promote repertoires	✓		✓	✓
Provide creative advice and mentoring			✓	✓
Contribute to career goal setting and development of the artist	✓		✓	✓
Develop sheet and printed music				
Work with other music publishers to develop policy and advocate for the industry				✓
Secure funding and plan finances	✓			✓
Manage human resources				✓
Comply with business laws, regulations and practices		✓	✓	✓
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems				✓
Project management skills	✓	✓		✓
Develop digital marketing and distribution opportunities	✓		✓	✓
Understand and protect digital rights management	✓	✓	✓	✓

Figure 20 SKILLS OFFERED BY PROVINCIAL MUSIC ASSOCIATIONS AND MUSIC PUBLISHING ASSOCIATIONS 2 OF 2

Skill	Music BC	Music and Film in Motion	APEM	ADISQ
Solicit and assess songs	✓	✓	✓	
Assess creator's business and earning potential		✓		
Define and understand the nature of contracts	✓	✓	✓	✓
Negotiate contracts	✓	✓	✓	✓
Execute contracts	✓	✓	✓	✓
Register works	✓	✓	✓	✓
Negotiate adaptations and translations			✓	
Obtain or issue sampling clearances	✓	✓		
Monitor use of copyright	✓	✓	✓	
Address infringement issues and resolve disputes		✓	✓	
Accounting ability to track, collect and pay out royalties	✓	✓	✓	✓
Develop and execute a sales strategy to exploit and promote repertoires		✓	✓*	✓
Provide creative advice and mentoring	✓	✓	✓	✓
Contribute to career goal setting and development of the artist	✓	✓	✓	✓
Develop sheet and printed music	✓		✓	
Work with other music publishers to develop policy and advocate for the industry	✓	✓	✓	
Secure funding and plan finances	✓	✓	✓*	✓
Manage human resources		✓	✓*	
Comply with business laws, regulations and practices	✓	✓	✓	✓
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems		✓	✓*	
Project management skills	✓	✓	✓*	
Develop digital marketing and distribution opportunities	✓	✓	✓	✓
Understand and protect digital rights management	✓	✓	✓	✓

Note: APEM is the Association des professionnels de l'édition musicale; ADISQ is the Association québécoise de l'industrie du disque, du spectacle et de la vidéo.

*Denotes that future programming is to be confirmed.

Respondent skills acquired through informal training

Music publishers who undertook professional development training (in the form of a conference or workshop) during the past year were asked what skill they learned and who offered the training. Figure 21 and Figure 22 summarize the skills learned through informal training broken down by institution.

Figure 21 SKILLS ACQUIRED THROUGH INFORMAL TRAINING (1 OF 3)

Skill	Canadian Music Publishers Association	South by South west	Music and Film in Motion	Ontario Council of Folk Festivals
Solicit and assess songs			✓	
Assess creator's business and earning potential				
Define and understand the nature of contracts	✓			
Negotiate contracts				
Execute contracts				
Register works				
Negotiate adaptations and translations				
Obtain or issue sampling clearances				
Monitor use of copyright	✓			
Address infringement issues and resolve disputes				
Accounting ability to track, collect and pay out royalties				✓
Develop and execute a sales strategy to exploit and promote repertoires	✓		✓	✓
Provide creative advice and mentoring				
Contribute to career goal setting and development of the artist				
Develop sheet and printed music				
Work with other music publishers to develop policy and advocate for the industry				
Secure funding and plan finances			✓	
Manage human resources				
Comply with business laws, regulations and practices				
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems				
Project management skills				
Develop digital marketing and distribution opportunities	✓			
Understand and protect digital rights management	✓	✓		

Figure 22 SKILLS ACQUIRED THROUGH INFORMAL TRAINING (2 OF3)

	Trebas Institute	Manitoba Audio Recording Industry Association	Nashville Songwriters Association International
Solicit and assess songs			✓
Assess creator's business and earning potential			
Define and understand the nature of contracts	✓	✓	
Negotiate contracts			
Execute contracts			
Register works			
Negotiate adaptations and translations			
Obtain or issue sampling clearances			
Monitor use of copyright			
Address infringement issues and resolve disputes			
Accounting ability to track, collect and pay out royalties			
Develop and execute a sales strategy to exploit and promote repertoires			
Provide creative advice and mentoring			
Contribute to career goal setting and development of the artist			
Develop sheet and printed music			
Work with other music publishers to develop policy and advocate for the industry			
Secure funding and plan finances			
Manage human resources			
Comply with business laws, regulations and practices			
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems			
Project management skills			
Develop digital marketing and distribution opportunities			
Understand and protect digital rights management			

Note: Although the Trebas Institute is listed above as a formal training institution, they also offer a slate of seminars and workshops, and are included here under informal training as well.

Figure 23 SKILLS ACQUIRED THROUGH INFORMAL TRAINING (3 OF 3)

	East Coast Music Awards	Western Canadian Music Awards	Future of Music	Guild of Canadian Film Composers
Solicit and assess songs			✓	
Assess creator's business and earning potential				
Define and understand the nature of contracts	✓			
Negotiate contracts				
Execute contracts				
Register works				
Negotiate adaptations and translations				
Obtain or issue sampling clearances				
Monitor use of copyright				✓
Address infringement issues and resolve disputes				
Accounting ability to track, collect and pay out royalties	✓			
Develop and execute a sales strategy to exploit and promote repertoires				
Provide creative advice and mentoring				
Contribute to career goal setting and development of the artist				
Develop sheet and printed music				
Work with other music publishers to develop policy and advocate for the industry				
Secure funding and plan finances				
Manage human resources				
Comply with business laws, regulations and practices				
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems				
Project management skills				
Develop digital marketing and distribution opportunities			✓	
Understand and protect digital rights management		✓	✓	

Training gaps analysis

Training offerings analysis

Of the eight formal training institutions interviewed, seven of them are located in Ontario, either in or near Toronto. One of the Ontario institutions does have a campus in Montréal as well and instruction is offered in French and English. There are also formal training institutions located in British Columbia but their training offerings could not be verified for this study.

There are no major formal training institutions in Saskatchewan or Manitoba so music publishers in these two provinces would have to rely on informal training for some skills. This is also true for the Maritime provinces (New Brunswick, Nova Scotia, Prince Edward Island and Newfoundland and Labrador).

The eight provincial music associations and music publishing associations who were interviewed for this study are all aware of the important role their training offerings play in the current and future training for music publishers. Funding, or lack thereof, was cited as a major barrier to offering more training by nearly all of the associations interviewed.

Skills gap analysis

Figure 24, below, shows the skills gap, which is the percentage of respondents who say a specific skill is *needed* (required and *still to be acquired*). Expectations as to where that skill will be acquired are shown in the five right-most columns.

- Informal training is the most common means by which respondents anticipate they will acquire the needed skills.
- On the job training is also seen as a likely skill acquisition path.
- Self-training and formal training are the least common expected skills acquisition paths.
- For some skills, a high proportion (at least one-fifth) of respondents replied that they did not know where they would acquire it: These are:
 - address infringement issues and resolve disputes;
 - monitor use of copyright; accounting ability to track, collect and pay out royalties;
 - understand and protect digital rights management; and
 - develop digital marketing and distribution opportunities.

Figure 24 SKILLS GAPS AND FUTURE ACQUISITION PATH

Skills	Skills gap	Need to acquire (N)	Expectation of how skills gap will be filled				
			On the job	Self-taught	Formal training	Informal training	Don't know
Obtain or issue sampling clearances	18%	11	4	2	1	7	1
Address infringement issues and resolve disputes	17%	13	2	2	2	8	4
Understand and protect digital rights management	16%	18	4	1	2	13	4
Negotiate adaptations and translations	15%	7	3	1	1	3	2
Develop sheet and printed music	15%	6	1	1	2	4	1
Work with other music publishers to develop policy and advocate for the industry	13%	8	4	1	1	6	1
Develop digital marketing and distribution opportunities	13%	14	6	4	2	8	3
Accounting ability to track, collect and pay out royalties	11%	11	4	1	3	6	3
Monitor use of copyright	9%	10	2	2	2	7	3
Secure funding and plan finances	8%	8	3	3	3	6	2
Develop and execute a sales strategy to exploit and promote repertoires	8%	8	3	2	2	6	0
Negotiate contracts	7%	7	2	2	4	6	0
Execute contracts	7%	7	1	2	4	6	0
Contribute to career goal setting and development of the artist	6%	7	3	1	1	4	2
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	6%	7	2	1	4	4	1
Comply with business laws, regulations and practices	6%	8	3	1	2	4	1
Manage human resources	5%	4	2	1	2	2	1
Define and understand the nature of contracts	5%	6	1	1	3	6	0
Assess creator's business and earning potential	5%	4	3	2	2	2	1
Provide creative advice and mentoring	4%	5	2	1	1	2	2
Project management skills	4%	4	3	1	3	4	0
Solicit and assess songs	3%	3	1	3	2	2	0
Register works	3%	4	2	2	1	4	0

Note: Percentages shown under “Expectation of how skills gap will be filled” are derivations of the percentage shown under “Skills gap” (i.e., those identifying the skill as one that they need). The actual number of respondents who still need to acquire the specific skill are shown in the next column. The five right-hand

columns, when summed across the row, may exceed the total number of respondents because multiple responses were accepted.

Figure 25 below shows the following for each skill:

- the skills gap;
- the number of respondents who say they need to acquire the skill;
- the number of respondents who say they need the skill and who expect this gap to be addressed through formal training;
- the number of institutions and organizations providing training (out of a total of eight interviewed).

This allows us to assess whether institutions and organizations are offering the training needed to fill each gap.

Some skills measured in this study are taught by all eight of the formal training organizations and institutions interviewed, including: defining and understanding the nature of contracts; negotiating contracts; executing contracts; registering works; developing and executing a sales strategy to exploit and promote repertoires; and, contributing to career goal setting and development of the artist.

Only three of the institutions offer training in negotiating adaptations and translations, however this should have minimal impact on the acquisition of this skill, as only one respondent feels he or she will gain the skill through this type of training.

Figure 25 ANALYSIS: SKILLS GAPS, NEED TO ACQUIRE SKILL, FORMAL TRAINING OFFERINGS

Skills	Skills gap	Need to acquire (N)	Address through formal training?	Count of institutions / organizations offering (of 8)
Obtain or issue sampling clearances	18%	11	1	6
Address infringement issues and resolve disputes	17%	13	2	6
Understand and protect digital rights management	16%	18	2	6
Negotiate adaptations and translations	15%	7	1	3
Develop sheet and printed music	15%	6	2	7
Work with other music publishers to develop policy and advocate for the industry	13%	8	1	5
Develop digital marketing and distribution opportunities	13%	14	2	7
Accounting ability to track, collect and pay out royalties	11%	11	3	7
Monitor use of copyright	9%	10	2	7
Secure funding and plan finances	8%	8	3	7
Develop and execute a sales strategy to exploit and promote repertoires	8%	8	2	8
Negotiate contracts	7%	7	4	8
Execute contracts	7%	7	4	8
Contribute to career goal setting and development of the artist	6%	7	1	8
Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	6%	7	4	4
Comply with business laws, regulations and practices	6%	8	2	6
Manage human resources	5%	4	2	5
Define and understand the nature of contracts	5%	6	3	8
Assess creator's business and earning potential	5%	4	2	7
Provide creative advice and mentoring	4%	5	1	7
Project management skills	4%	4	3	6
Solicit and assess songs	3%	3	2	7
Register works	3%	4	1	8

Training gaps: skill by skill

Below, each of the 23 skills measured in this study are discussed covering the following points in sequence:

- The size of the skills gap;
- The percentage of music publishers who say the skill is required to perform their job;
- How music publishers expect a given gap to be addressed (for example, on-the-job training, formal training, informal training or self-teaching), and any statistically significant cross-tabulations;
- The number of institutions and organizations that offer training for each skill. A total of eight interviews were conducted with formal training institutions and eight interviews were conducted with provincial music and music publishing associations who offer informal training. Readers should note once again, that evaluating the quality and type of education (e.g. practically-oriented vs. theoretically-based) is beyond the scope of this training gaps analysis.
- The percentage of respondents who attended a conference or workshop in the past year offering professional development in a skill (if applicable); and
- The percentage of all respondents who consider the skill to be one of the greatest training needs now or in the foreseeable future.

Obtain or issue sampling clearances

- **Skill gap:** 18%, which is the largest skills gap identified in this study.
- **Skill required:** 43% say required.
- **Respondents most likely to indicate needing this skill:** Professional music publishers.
- **Skills acquisition**
 - *On the job training:* 49%.
 - *Self-teaching:* 46%.
 - *Formal training:* 13%.
 - *Informal training:* 20%.
- **Training offered:** Most (six) of the eight training institutions interviewed offer formal training for this skill. Five of the eight provincial music and music publishing associations interviewed offer informal training for this skill. Since most music publishers who still need to acquire this skill expect to do so through on the job training or self-teaching, no significant training gap exists for this skill.
- **Identified as one of the greatest training needs:** 1% of respondents feel that training for obtaining and issuing sampling clearance is a high priority.

Address infringement issues and resolve disputes

- **Skill gap:** 17%, the second largest skills gap.
- **Skill required:** 52% say required.
- **Respondents most likely to indicate needing this skill:** Professional and large-scale (those with 501 or more works) music publishers.
- **Skills acquisition**
 - *On the job training:* 49%.
 - *Self-teaching:* 44%.
 - *Formal training:* 20%.
 - *Informal training:* 20%.
- **Training offered:** Six of the eight institutions offer formal training for this skill. Five of the eight provincial music and music publishing associations offer informal training for this skill. One-fifth of music publishers who need to acquire this skill expect to do so through formal training and one-fifth expect to acquire it through informal training. There is no significant training gap for this skill.

Understand and protect digital rights management

- **Skill gap:** 16%, third largest skills gap in this study.
- **Skill required:** 78% say required.
- **Skills acquisition**
 - *On the job training:* 48%.
 - *Self-teaching:* 46%.
 - *Formal training:* 9%.
 - *Informal training:* 28%.
- **Training offered:** Six of the training institutions interviewed provide formal training for this skill. All eight of the associations interviewed offer informal training for this skill. Being that most music publishers who need to acquire this skill expect to do so through self-teaching or on the job training and nearly all institutions and associations surveyed provide training in this skill, no significant training gap exists.
- **Skills acquired at a conference or workshop in the past year:** 11% received training related to understanding and protecting digital rights management.
- **Identified as one of the greatest training needs:** More respondents identify this as an important training need (23%) than any other examined in this study.

Negotiate adaptations and translations

- **Skill gap:** 15%, fourth largest skills gap.
- **Skill required:** 34% say required, which music publishers identify as the second least essential skill to perform their duties.
- **Respondents most likely to indicate needing this skill:** Professional and large-scale music publishers.
- **Skills acquisition**
 - *On the job training:* 56%.
 - *Self-teaching:* 49%.
 - *Formal training:* 13%.
 - *Informal training:* 22%.
- **Training offered:** Only three of the eight training organizations and institutions provide formal training for this skill. Only one of the provincial music and music publishing associations offer informal training for this skill. Thirteen percent of the music publishers who need to acquire this skill expect to do so through formal training and over one-fifth expect to do so through informal training. There is a training gap here, however, because most of the music publishers who need to acquire this skill also expect to learn it on the job or through self-teaching, the gap will probably be compensated for through those methods. Also, even though there is a skill gap of 15%, none of the respondents indicated this skill to be among the greatest training needs, and this skill is considered one of the least essential for music publishers.

Develop sheet and printed music

- **Skill gap:** 15%.
- **Skill required:** 30% say required, fewest respondents identify this as a skill necessary for their job as a music publisher.
- **Skills acquisition**
 - *On the job training:* 38%.
 - *Self-teaching:* 45%.
 - *Formal training:* 25%.
 - *Informal training:* 18%.
- **Training offered:** Seven of the eight training organizations and institutions offer formal training for this skill. Only two of the eight offers informal training in this skill. There is a training gap for this skill as far as informal training is concerned as nearly one-fifth of respondents who need to acquire this skill expect to do so through informal training. However, this skill is considered the least essential for music publishers and was not mentioned as one of the greatest training needs.

Develop digital marketing and distribution opportunities

- **Skill gap:** 13%.
- **Skill required:** 75% say required.
- **Skills acquisition**
 - *On the job training:* 52%.
 - *Self-teaching:* 54%.
 - *Formal training:* 7%.
 - *Informal training:* 21%.
- **Training offered:** Most (seven) of the training organizations and institutions provide formal training for this skill. Seven of the eight provincial music and music publishing associations offer informal training for this skill. No significant training gap exists for this skill.
- **Skills acquired at a conference or workshop in the past year:** 6% received training in this skill.
- **Identified as one of the greatest training needs:** 9% say that developing digital marketing and distribution opportunities is one of the greatest training needs.

Work with other music publishers to develop policy and advocate for the industry

- **Skill gap:** 13%.
- **Skill required:** 42% say required.
- **Skills acquisition**
 - *On the job training:* 41%.
 - *Self-teaching:* 51%.
 - *Formal training:* 14%.
 - *Informal training:* 20%
- **Training offered:** Five of the training organizations and institutions provide formal training for this skill. Four of the provincial music and music publishing associations offer informal training for this skill. As this has one of the higher skills gaps, and one-fifth of those who need to acquire this skill expect to do so through informal training, a training gap does exist for this skill. Once again though, this skill is among those considered the least essential for music publishers so the training gap may be of little consequence.

Accounting ability to track, collect and pay out royalties

- **Skill gap:** 11%.
- **Skill required:** 72% say required.
- **Respondents most likely to indicate needing this skill:** Professional and large-scale music publishers.
- **Skills acquisition**
 - *On the job training:* 48%.
 - *Self-teaching:* 45%.
 - *Formal training:* 22%.
 - *Informal training:* 16%.
- **Training offered:** Seven organizations and institutions provide formal training for this skill. Seven of the eight associations offer informal training for this skill. No significant training gap exists for this skill.
- **Skills acquired at a conference or workshop in the past year:** 3% received training in the tracking, collection and pay out of royalties.
- **Identified as one of the greatest training needs:** 2% of music publishers feel that the ability to track, collect and pay out royalties is a top training priority.

Monitor use of copyright

- **Skill gap:** 9%.
- **Skill required:** 74% say required.
- **Respondents most likely to indicate needing this skill:** Large-scale music publishers.
- **Skills acquisition**
 - *On the job training:* 49%.
 - *Self-teaching:* 51%.
 - *Formal training:* 12%.
 - *Informal training:* 18%.
- **Training offered:** Seven organizations and institutions interviewed in this study offer formal training for this skill. All but one of the music and music publishing associations offer informal training for this skill. No significant training gap exists for this skill.
- **Skills acquired at a conference or workshop in the past year:** 11% received training related to synchronization rights and a further 6% received copyright management training.

- **Identified as one of the greatest training needs:** 15% of respondents identified understanding copyright protection as a major training need, while 2% view synchronization rights as an important training need.

Secure funding and plan finances

- **Skill gap:** 8%.
- **Skill required:** 68% say required.
- **Skills acquisition**
 - *On the job training:* 53%. Large-scale music publishers are more likely to acquire this skill through on-the-job training.
 - *Self-teaching:* 48%.
 - *Formal training:* 15%.
 - *Informal training:* 21%.
- **Training offered:** The majority (seven) of the training organizations and institutions provide formal training for securing funding and finance planning. Six of the eight provincial music and music publishing associations interviewed offer informal training for this skill. No significant training gap exists for this skill, however, since many music publishers who need to acquire this skill expect to do so through formal and informal training, the training gap for this skill should be monitored.
- **Skills acquired at a conference or workshop in the past year:** 3% received training in this area.
- **Identified as one of the greatest training needs:** 4% feel training in securing funding and financial planning is a key training need.

Develop and execute a sales strategy to exploit and promote repertoires

- **Skill gap:** 8%.
- **Skill required:** 75% say required.
- **Skills acquisition**
 - *On the job training:* 54%.
 - *Self-teaching:* 50%.
 - *Formal training:* 15%.
 - *Informal training:* 18%.

- **Training offered:** All of the organizations and institutions interviewed (eight) provide formal training for this skill. Six of the eight associations interviewed offer informal training in this skill. No significant training gap exists for this skill.
- **Skills acquired at a conference or workshop in the past year:** 13% received this type of training.
- **Identified as one of the greatest training needs:** For 11% of respondents, developing and executing a sales strategy to exploit and promote repertoires is at the top of their training needs list.

Negotiate contracts

- **Skill gap:** 7%.
- **Skill required:** 74% say required.
- **Skills acquisition**
 - *On the job training:* 50%.
 - *Self-teaching:* 53%.
 - *Formal training:* 17%.
 - *Informal training:* 18%.
- **Training offered:** All eight organizations and institutions interviewed in this study provide formal training in contract negotiation. Seven of the eight music and music publishing associations offer informal training for this skill. No significant training gap exists for this skill at this time.

Execute contracts

- **Skill gap:** 7%.
- **Skill required:** 76% say required.
- **Respondents most likely to indicate needing this skill:** Medium-scale publishers.
- **Skills acquisition**
 - *On the job training:* 50%.
 - *Self-teaching:* 51%.
 - *Formal training:* 19%. Professional music publishers (25%) are more likely than artists (3%) to learn this skill through formal training.
 - *Informal training:* 17%.

- **Training offered:** All the organizations and institutions provide formal training in contract execution. All of the provincial music and music publishing associations interviewed offer informal training for this skill. No significant training gap exists for this skill.

Comply with business laws, regulations and practices

- **Skill gap:** 6%.
- **Skill required:** 96% say required, the vast majority of respondents acknowledge this as a necessary skill for music publishers.
- **Skills acquisition**
 - *On the job training:* 49%.
 - *Self-teaching:* 49%. Small and medium-scale music publishers are more likely than average to be self-taught in this skill
 - *Formal training:* 16%.
 - *Informal training:* 12%.
- **Training offered:** Six of eight training organizations and institutions interviewed provide formal training for this skill. Seven of eight music and music publishing associations offer informal training for this skill. No significant training gap exists for this skill as the skill gap is quite small at 6% and none of the respondents indicated that this skill is one of the greatest training needs.

Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems

- **Skill gap:** 6%.
- **Skill required:** 83% say required.
- **Skills acquisition**
 - *On the job training:* 50%.
 - *Self-teaching:* 47%.
 - *Formal training:* 21%.
 - *Informal training:* 10%.
- **Training offered:** Four of the organizations and institutions interviewed provide formal training for this skill. Only three of the eight music and music publishing associations interviewed offer informal training for this skill. There a training gap for this skill as over one-fifth of the music publishers who need to acquire this skill expect to do so through formal training and another ten percent expect to acquire it through informal training. This skill is also considered among the most- required for music publishers.

- **Identified as one of the greatest training needs:** 5% say training is needed for administration skills.

Contribute to career goal setting and development of the artist

- **Skill gap:** 6%.
- **Skill required:** 82% say required.
- **Skills acquisition**
 - *On the job training:* 53%.
 - *Self-teaching:* 55%.
 - *Formal training:* 6%.
 - *Informal training:* 17%.
- **Training offered:** All of the training organizations and institutions provide formal training for this skill. Seven of the eight associations interviewed offer informal training for this skill. No significant training gap exists for this skill.

Manage human resources

- **Skill gap:** 5%.
- **Skill required:** 59% say required.
- **Respondents most likely to indicate needing this skill:** Professional music publishers.
- **Skills acquisition**
 - *On the job training:* 54%.
 - *Self-teaching:* 48%.
 - *Formal training:* 19%.
 - *Informal training:* 16%.
- **Training offered:** Formal training in human resources management is provided by five of the training organizations and institutions. Three of the eight music and music publishing associations interviewed offer informal training for this skill. There is a potential training gap here as nearly one-fifth of those who need to acquire this skill expect to do so through formal training and another sixteen percent expect to do so through informal training.

Define and understand the nature of contracts

- **Skill gap:** 5%.
- **Skill required:** 92% say required, which is the second highest in this study.

- **Skills acquisition**
 - *On the job training:* 49%.
 - *Self-teaching:* 51%.
 - *Formal training:* 22%. Professional music publishers (29%) are more likely than artists (5%) to acquire this skill through formal training.
 - *Informal training:* 19%.
- **Training offered:** All eight organizations and institutions interviewed in this study offer formal training for this particular skill. All eight provincial music and music publishing associations interviewed provide informal training for this skill. No significant training gap exists for this skill.
- **Skills acquired at a conference or workshop in the past year:** 8% received training in defining and understanding the nature of contracts.
- **Identified as one of the greatest training needs:** 3% say learning about the nature of contracts is one of the greatest training needs.

Provide creative advice and mentoring

- **Skill gap:** 4%.
- **Skill required:** 81% say required.
- **Skills acquisition**
 - *On the job training:* 52%.
 - *Self-teaching:* 59%.
 - *Formal training:* 8%.
 - *Informal training:* 14%.
- **Training offered:** A majority of the organizations and institutions (seven) provide formal training for this skill. Six of eight music and music publishing associations offer informal training for this skill. The vast majority of those who need to acquire this skill expect to do so through on the job training or self-teaching. No significant training gap exists for this skill.

Project management skills

- **Skill gap:** 4%.
- **Skill required:** 81% say required.
- **Skills acquisition**
 - *On the job training:* 51%. Large-scale music publishers are more likely than average to gain this skill through on the job training.

- *Self-teaching: 50%.*
- *Formal training: 20%.*
- *Informal training: 15%.*
- **Training offered:** Six of the training organizations and institutions provide formal training for project management skills. Six of eight music and music publishing associations interviewed offer informal training for this skill. No significant training gap exists for this skill.
- **Identified as one of the greatest training needs:** 1% say feel this is a top training priority.

Assess creator's business and earning potential

- **Skill gap:** 5%.
- **Skill required:** 63% say required.
- **Respondents most likely to indicate needing this skill:** Professional and large-scale music publishers.
- **Skills acquisition**
 - *On the job training: 48%.*
 - *Self-teaching: 63%.*
 - *Formal training: 10%.*
 - *Informal training: 18%.*
- **Training offered:** Seven of the eight organizations and institutions interviewed provide formal training for this particular skill. Four of the eight music and music publishing associations offer informal training for this skill. No significant training gap exists for this skill.

Solicit and assess songs

- **Skill gap:** 3%.
- **Skill required:** 62% say required.
- **Respondents most likely to indicate needing this skill:** Professional and large-scale music publishers.
- **Skills acquisition**
 - *On the job training: 45%.*
 - *Self-teaching: 62%.*
 - *Formal training: 10%.*
 - *Informal training: 23%.*

- **Training offered:** Seven training organizations and institutions offer formal training in song solicitation and assessment. Six of eight music and music publishing associations provide informal training for this skill. No significant training gap exists for this skill.
- **Skills acquired at a conference or workshop in the past year:** 5% received training in this skill.
- **Identified as one of the greatest training needs:** 5% identify this as a principal training need.

Register works

- **Skill gap:** 3%.
- **Skill required:** 89% say required.
- **Skills acquisition**
 - *On the job training:* 48%.
 - *Self-teaching:* 55%.
 - *Formal training:* 11%.
 - *Informal training:* 20%.
- **Training offered:** All of the eight training organizations and institutions interviewed provide formal training for this skill, therefore is not surprising that this is one the smallest skill gaps in the study. All eight of the provincial music and music publishing associations interviewed offer informal training for this skill. No significant training gap exists.
- **Identified as one of the greatest training needs:** 1% name this as a significant training need.

Respondent profile

Rather than relying upon occupational titles to define music publishers, this training gaps analysis uses a functional definition, worded as follows:

- A music publisher is defined as someone who exploits, administers and protects the repertoires of musical works. A music publisher may organize collaborations between lyricists and publishers and generally promotes and assists the development of an artist's career. Do you undertake one or all of these activities for yourself, or on behalf of others?

This section is a profile of the respondents who participated in this research study, and should not be considered a "count" of music publisher populations or subsets.

Respondent profile: province of origin

Figure 26 below, shows the province-by-province distribution of respondents who participated in the survey.

Figure 26 RESPONDENT PROFILE: DISTRIBUTION BY PROVINCE

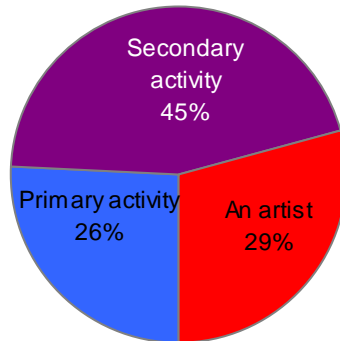
Province	%
Ontario	49%
British Columbia	19%
Alberta	10%
Quebec	8%
Manitoba	6%
Nova Scotia	3%
Saskatchewan	1%
New Brunswick	1%
Newfoundland	1%
Territories	1%

The total percentage does not equal 100% due to rounding.

Respondent profile: type of activity

Respondents indicated whether they consider music publishing to be a primary activity (generates 50% or more of their total revenue), a secondary activity (generates less than 50% of their total revenue), or whether they primarily are an artist who publishes their own work. See Figure 27 below.

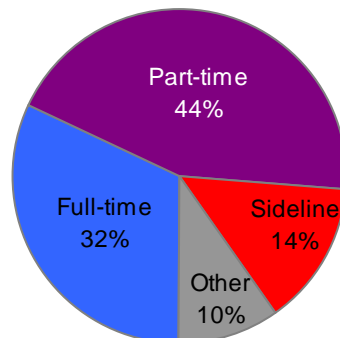
Figure 27 RESPONDENT PROFILE: RESPONDENTS BY TYPE OF ACTIVITY



Respondent profile: type of employment

Respondents provided data on their employment directly related to music publishing (see Figure 28). Only one third of respondent are engaged in full-time employment directly related to music publishing.

Figure 28 RESPONDENT PROFILE: TYPE OF EMPLOYMENT

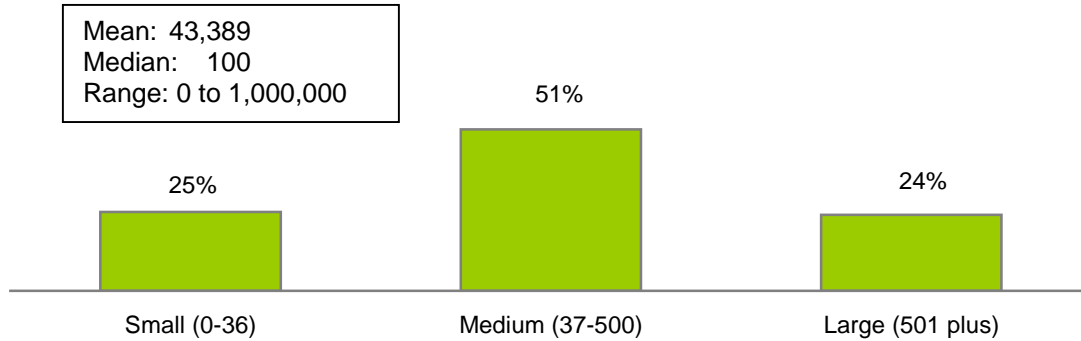


Note: “Sideline” refers to respondents who are engaged in music publishing “on the side” and do not consider it to even be a “part-time” occupation.

Respondent profile: number of works represented

kisquared asked music publishers how many works they represent (see Figure 29). The average number of works represented is 43,389 while the median (middle-most) is 100 works.

Figure 29 RESPONDENT PROFILE: NUMBER OF WORKS REPRESENTED

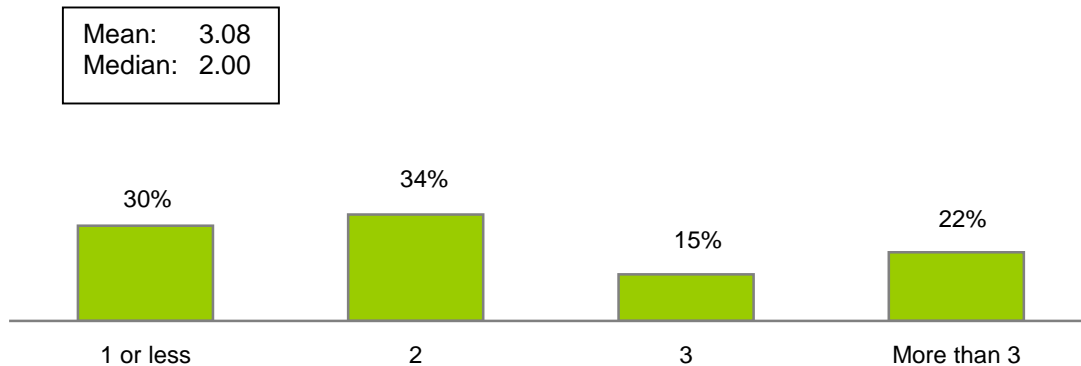


Note: Responses of “don’t know / refused” have been excluded.

Respondent profile: size of organization

kisquared asked respondents to report how many individuals work in their creative group or organization as music publishers (see Figure 291). The average number of employees per company is three, while the median (middle-most) is two employees.

Figure 30 RESPONDENT PROFILE: AVERAGE NUMBER OF INDIVIDUALS WHO WORK IN THE CREATIVE GROUP



Note: Responses of “don’t know / refused” have been excluded.

Respondent profile: association membership

Respondents were asked if they maintained membership in professional associations pertaining to music publishing. Nearly ninety percent of respondents maintain membership in at least one professional association (see Figure 31) with eighty-four percent belonging to the Society of Composers, Authors and Music Publishers of Canada (SOCAN).

Figure 31 RESPONDENT PROFILE: MEMBERSHIP

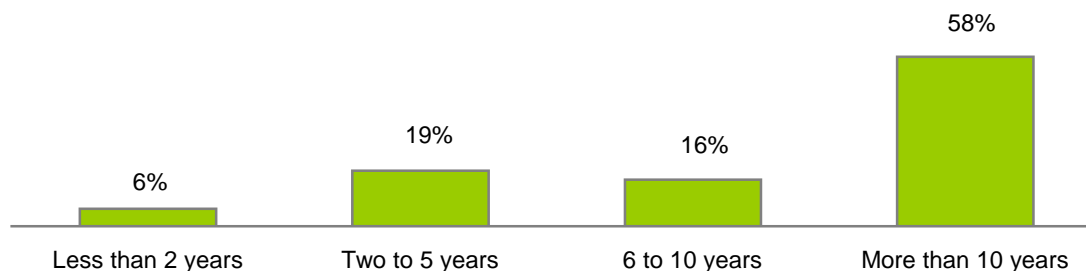
Organization	%
Society of Composers, Authors and Music Publishers of Canada (SOCAN)	84%
Canadian Musical Reproduction Rights Agency	44%
Canadian Music Publishers Association	30%
Canadian Independent Record Production Association	25%
Association québécoise de l'industrie du disque, du spectacle et de la vidéo (ADISQ)	6%
Professional Music Publishers Association	4%
The Society for Reproduction Rights of Authors, Composers and Publishers in Canada	1%
Other	1%
None	11%

Note: Percentages exceed 100% because multiple responses were accepted.

Respondent profile: length of active participation in the music publishing industry

Music publishers were asked how long they have been involved in the music publishing industry (see Figure 32).

Figure 32 RESPONDENT PROFILE: EMPLOYMENT DURATION



Note: Percentages may not total 100% exactly due to rounding.

Appendix A: Marginals

N = 144

INTERVIEWER: ___ ___ ___ SURVEY # ___ ___ ___

PROVINCE: BC.....19% AB10% SK1% MB6% ON.....49%

PQ..... 8% NB..... 1% NS3% PEI.....0% NF 1%

Territories... 1%

NAME: _____

COMPANY NAME (IF APPLICABLE): _____

PHONE: (___ ___) ___ ___ - ___ ___ ___ EXT: ___ ___ ___

May I please speak to _____ ?

ANSWERING MACHINE MESSAGE: Hello, my name is _____ and I'm calling on behalf of the CHRC – the Cultural Human Resources Council about the national training study for music publishers. Your name was given to us as a music publisher. I would really appreciate it if you could return my call at 1-888-950-8002. Also, let me assure you I am conducting research on behalf of the CHRC. This is not a sales call. I look forward to speaking with you soon. And again, the toll free number is 1-888-950-8002. Thanks!

Hello, my name is _____ and I'm calling on behalf of the Cultural Human Resources Council, about a national training study for music publishers. We would like to discuss music publishing with people *in* the industry, and are looking to speak to someone who can describe their experiences with skill building and training. Would that person be you? **IF NO, ASK WHO WOULD BE APPROPRIATE RESPONDENT AND RECORD CONTACT INFO.**

IF YES... This survey should only take about 12 minutes – do you have time right now to complete this survey? **IF NOT, ASK IF THERE IS A BETTER TIME AND ARRANGE TO CALL BACK.**

Before we begin I would just like to assure you this information will never be shared with any government agency. All the information gathered through this study is strictly confidential. We guarantee your anonymity. We will be asking questions about your own experiences, but no individual or business names will be attached to the research findings, and the report submitted to the CHRC will only discuss the results of the survey as a whole.

Q1 **[MUSIC PUBLISHER QUALIFICATION]** For the purposes of this study, a music publisher is defined as someone who exploits, administers and protects the repertoires of musical works. A music publisher may organize collaborations between lyricists and publishers and generally promotes and assists the development of an artist's career. Do you undertake one or all of these activities for yourself, or on behalf of others?

Yes	100%	
No.....	0%	TERMINATE
Don't know / refused	0%	TERMINATE

Q2 Do you consider music publishing to be...**READ LIST AND CIRCLE ONE RESPONSE ONLY**

A primary activity for your business that generates more than 50% of your total revenue.....	26%	
A secondary activity for your business that generates less than 50% of your total revenue.....	45%	
Or, do you consider yourself as an artist primarily who publishes your own work? ...	29%	
Don't know / Refused	0%	TERMINATE

Q3 How long have you personally been involved in the music publishing industry?

Less than 2 years.....	6%
Two to 5 years.....	19%
6 to 10 years	16%
More than 10 years.....	58%
Don't know / Refused	0%

Q4 Are you a member of any of the following? **READ AND CIRCLE ALL THAT APPLY**

Society of Composers, Authors and Music Publishers of Canada	83%
Canadian Musical Reproduction Rights Agency	44%
Canadian Music Publishers Association.....	30%
Canadian Independent Record Production Association.....	24%
Association québécoise de l'industrie du disque, du spectacle et de la vidéo	6%
Professional Music Publishers Association	4%
Other	3%
None.....	11%
Don't know / Refused	1%

Q5 How many works do you represent?

____, _____, _____ **DK / REF ENTER 99999**

Q6 When thinking about your employment directly related to music publishing, would you describe your music publishing employment as full-time, part-time or in some other arrangement?

Full-time..... 32%
 Part-time..... 44%
 Sideline 14%
 Other 10%
 Don't know / refused 0%

Q7 Including yourself, how many individuals work in your creative group or business organization as music publishers?

_____ **DK / REF ENTER 999**

GO TO SKILLS SHEET NOW

Q8 We have asked you about a series of music publishing skills. Thinking about all the things that music publishers do in their job, are there any skills or skills training we have missed speaking to you about, or that you think may be required in future? **PROBE** Anything else? Anything else?

Q9 Have you ever participated in a formal training program for music publishers such as a university or college program?

Yes 13%
 No..... 88% **GO TO Q12**
 Don't know / Refused 0% **GO TO Q12**

Q10 What was the name of the institution where you took this program?

Q11 What was the name of the program? **IF NECESSARY** What was your major or concentration?



Q12 In the past year, have you attended any conference or workshop related to professional development in the field of music publishing?

Yes 44%
 No..... 56% **GO TO Q16**
 Don't know / refused 0% **GO TO Q16**

Q13 And what skill or skill set did you learn? **PROBE** Anything else? Anything else?

Q14 Who offered the training? **CONFIRM NAME AND SPELLING** So that was...

Q15 How long was the conference or workshop that you attended?

___ ___ ___ • ___ days **ENTER 999 FOR DK/REF**

Q16 When thinking about music publishing training, what would you say are the greatest training needs right now or in the foreseeable future? **PROBE** Anything else? Anything else?

Since one of the goals of this study is to ensure we speak to a representative sample of music publishers across Canada, could you please give us the names and contact numbers of other any music publishers in your company or group OR artists who self publish that you think should be included in this study that we may not have heard about? **CHECK DATABASE AND ENTER ANY CONTACTS NOT ALREADY LISTED.**

Name _____ Ph: _____ - _____ - _____

Name _____ Ph: _____ - _____ - _____

Name _____ Ph: _____ - _____ - _____

Name _____ Ph: _____ - _____ - _____

That concludes this survey, thank you very much for taking the time to participate in this study.



Now let's turn to job skills. For each one of the following, please tell me if this skill is required *in general* to perform your job as a Music Publisher. Next, please tell me whether you currently have this skill, or whether you need to acquire it. Then I will ask where you learned this skill – on the job training, self-teaching or through formal training or informal training such as in conferences or workshops?

Skill	Do you need this skill to be a Music Publisher?			Do you have this skill or need to acquire this skill?			Where did you learn this skill? Where do you expect to learn this skill?				
	Yes	No	DK REF	Have	Need	DK REF	On the job	Self-taught	Formal	Informal / conference / workshop	DK REF
SS1 Solicit and assess songs	62%	38%	0%	96%	3%	1%	44%	61%	10%	23%	1%
SS2 Assess creator's business and earning potential	63%	37%	0%	93%	4%	2%	47%	62%	10%	18%	1%
SS3 Define and understand the nature of contracts	92%	8%	0%	94%	5%	2%	49%	51%	22%	19%	0%
SS4 Negotiate contracts	74%	26%	0%	93%	7%	0%	49%	53%	17%	18%	1%
SS5 Execute contracts	75%	24%	1%	92%	7%	2%	50%	51%	19%	17%	0%
SS6 Register works	89%	11%	0%	96%	3%	1%	47%	54%	11%	20%	1%
SS7 Negotiate adaptations and translations	33%	64%	4%	85%	15%	0%	53%	47%	13%	21%	4%
SS8 Obtain or issue sampling clearances	43%	56%	1%	82%	18%	0%	48%	45%	13%	19%	2%
SS9 Monitor use of copyright	74%	26%	0%	91%	9%	0%	49%	47%	11%	17%	3%
SS10 Address infringement issues and resolve disputes	52%	47%	1%	83%	17%	0%	47%	41%	19%	19%	5%
SS11 Accounting ability to track, collect and pay out royalties	72%	29%	0%	89%	11%	0%	46%	43%	21%	16%	5%
SS12 Develop and execute a sales strategy to exploit and promote repertoires	74%	25%	1%	93%	8%	0%	53%	49%	15%	18%	2%
SS13 Provide creative advice and mentoring	81%	19%	0%	96%	4%	0%	50%	57%	8%	14%	3%
SS14 Contribute to career goal setting and development of the artist	81%	17%	1%	94%	6%	0%	52%	54%	6%	17%	2%
SS15 Develop sheet and printed music	29%	69%	1%	83%	14%	2%	37%	44%	24%	17%	2%

Skill	Do you need this skill to be a Music Publisher?			Do you have this skill or need to acquire this skill?			Where did you learn this skill? Where do you expect to learn this skill?				
	Yes	No	DK REF	Have	Need	DK REF	On the job	Self-taught	Formal	Informal / conference / workshop	DK REF
SS16 Work with other music publishers to develop policy and advocate for the industry	42%	58%	0%	87%	13%	0%	40%	50%	13%	20%	2%
SS17 Secure funding and plan finances	67%	32%	1%	92%	8%	0%	52%	47%	14%	21%	2%
SS18 Manage human resources	57%	39%	4%	95%	5%	0%	54%	48%	18%	16%	1%
SS19 Comply with business laws, regulations and practices	96%	4%	0%	94%	6%	0%	49%	48%	16%	12%	1%
SS20 Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems	83%	17%	0%	94%	6%	0%	50%	47%	21%	10%	1%
SS21 Project management skills	75%	17%	8%	96%	4%	0%	51%	50%	20%	15%	0%
SS22 Develop digital marketing and distribution opportunities	74%	25%	1%	86%	13%	1%	50%	53%	7%	21%	3%
SS23 Understand and protect digital rights management	78%	22%	1%	83%	16%	1%	46%	44%	9%	27%	4%

GO TO Q8

Appendix B: Training offerings for music publishers

Formal training

This appendix contains information on programs offering training in music publishing skills. Secondary research on the programs was conducted along with an interview to confirm program information and solicit new information regarding specific music publishing training. A summary table listing the skills for which training is offered is included wherever an interview was completed.

British Columbia

Selkirk College

The Contemporary Music and Technology program offered at Selkirk College is a two-year diploma program to train musicians. The first year of study is comprised of core courses (including rhythm, keyboards, ensemble, computer applications to music, instrumental lab, history of rock, arranging, harmony and ear training) after which students may specialize in one of the following five streams: music performance, music production, composition, directed studies or general music. Specific courses that may be of interest to music publishers include songwriting, communication skills and the music industry.

<http://selkirk.ca/programs/dmmit/music/>

Stylus Music School

Located in Vancouver, Stylus Music School specializes in music education and career training. It offers a number of programs including a Music Business Management diploma program. The program components that are most relevant to music publishers include: Record Industry Agreements and Practices; Independent Publishers; Music Law; Music Merchandising & Financial Management; Marketing & Promotion; and Music Management in Film & Television. The program covers the music industry as a whole as well as the different segments of the industry. Stylus also offers online courses to students and has a job placement service / internship component to support students.

<http://www.stylusmusicschool.com/>

Alberta

Grant MacEwan College

Grant MacEwan College offers a full-time diploma program in Music which can be completed in two years of full time study. The course of study comprises an initial core year (two terms) of individual instrumental or vocal lessons, participation in small and large groups (including the jazz choir, big band, guitar and showcase bands, and percussion ensemble), improvisation, ear training, studies in musical literature and style, theory, and related performance experiences. After successful completion of the core year, students may apply to major during the second year in writing, performance, or recording arts, or pursue a more comprehensive program of studies. Courses offered in these majors include those related specifically to the chosen discipline as well as professionalism, music technology, and, again, relevant performance opportunities.

<http://www.macewan.ca/web/pvca/music/Program/>

Skills offered at Grant MacEwan College

Solicit and assess songs

Assess creator's business and earning potential

Define and understand the nature of contracts

Negotiate contracts

Execute contracts

Register works

Negotiate adaptations and translations

Obtain or issue sampling clearances

Develop and execute a sales strategy to exploit and promote repertoires

Provide creative advice and mentoring

Contribute to career goal setting and development of the artist

Develop sheet and printed music

Secure funding and plan finances

Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems

Note: Data derived from interview with Grant MacEwan College.

Ontario

Durham College

Located in Oshawa, Durham College offers two programs of music business training: Music Business Administration (2-year) and Music Business Management (3-year). Both programs have a strong focus on the music industry, which allow students to pursue a career in the recording industry by developing skills in management, marketing, promotions and small business environments.

<http://www.durhamcollege.ca/>

Skills offered at Durham College

Solicit and assess songs

Assess creator's business and earning potential

Define and understand the nature of contracts

Negotiate contracts

Execute contracts

Register works

Negotiate adaptations and translations

Obtain or issue sampling clearances

Monitor use of copyright

Address infringement issues and resolve disputes

Accounting ability to track, collect and pay out royalties

Develop and execute a sales strategy to exploit and promote repertoires

Provide creative advice and mentoring

Contribute to career goal setting and development of the artist

Develop sheet and printed music

Work with other music publishers to develop policy and advocate for the industry

Secure funding and plan finances

Manage human resources

Comply with business laws, regulations and practices

Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems

Project management skills

Develop digital marketing and distribution opportunities

Understand and protect digital rights management

Note: Data derived from interview with Durham College.

Fanshawe College

Fanshawe College offers a two-year diploma in the Music Industry Arts program that prepares students for careers in technical, business and creative areas of the music industry through hands-on training. Courses related to music publishing that are taught within this Diploma program include: contracts, introduction to the music industry, communication skills, and song and composition analysis.

<http://www.fanshawec.on.ca/programs/mia2.asp>

Skills offered at Fanshawe College

Solicit and assess songs

Assess creator's business and earning potential

Define and understand the nature of contracts

Negotiate contracts

Execute contracts

Register works

Monitor use of copyright

Address infringement issues and resolve disputes

Accounting ability to track, collect and pay out royalties

Develop and execute a sales strategy to exploit and promote repertoires

Provide creative advice and mentoring

Contribute to career goal setting and development of the artist

Develop sheet and printed music

Work with other music publishers to develop policy and advocate for the industry

Secure funding and plan finances

Manage human resources

Comply with business laws, regulations and practices

Project management skills

Develop digital marketing and distribution opportunities

Understand and protect digital rights management

Note: Data derived from interview with Fanshawe College.

Harris Institute

The Harris Institute, founded in 1989, offers a comprehensive generalist program to prepare students for a career in the music industry. It offers a full-time one-year Diploma program on two streams: Recording Arts Management and Producing / Engineering Program. Recording Arts Management teaches management skills for students pursuing a management position within the music industry. The Producing/Engineering Programs teaches students the art, technology and business of music production to prepare them for a career in the sound recording industry.

Courses related to music publishing are taught within these Diploma programs and cover such topics as: marketing, copyright, accounting, artist and repertoire, contracts and negotiations, soliciting songwriters and songs to publishing contracts, pitching songs to artists, pitching songs for commercial use (for example, television and film), and communication skills.

<http://www.harrisinstitute.com/>

Skills offered at Harris Institute

Solicit and assess songs

Assess creator's business and earning potential

Define and understand the nature of contracts

Negotiate contracts

Execute contracts

Register works

Obtain or issue sampling clearances

Monitor use of copyright

Address infringement issues and resolve disputes

Accounting ability to track, collect and pay out royalties

Develop and execute a sales strategy to exploit and promote repertoires

Provide creative advice and mentoring

Contribute to career goal setting and development of the artist

Develop sheet and printed music

Work with other music publishers to develop policy and advocate for the industry

Secure funding and plan finances

Manage human resources

Comply with business laws, regulations and practices

Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems

Project management skills

Develop digital marketing and distribution opportunities

Understand and protect digital rights management

Note: Data derived from interview with Harris Institute.

Humber College Institute of Technology & Advanced Learning

Humber College, located in Toronto, offers two programs that teach skills relevant to music publishers: a three-year advanced diploma in Music and a four-year Bachelor's degree of Applied Music – Contemporary Music.

<http://postsecondary.humber.ca/>

Skills offered at Humber College Institute of Technology & Advanced Learning

Solicit and assess songs

Assess creator's business and earning potential

Define and understand the nature of contracts

Negotiate contracts

Execute contracts

Register works

Obtain or issue sampling clearances

Monitor use of copyright

Address infringement issues and resolve disputes

Accounting ability to track, collect and pay out royalties

Develop and execute a sales strategy to exploit and promote repertoires

Provide creative advice and mentoring

Contribute to career goal setting and development of the artist

Develop sheet and printed music

Secure funding and plan finances

Manage human resources

Project management skills

Develop digital marketing and distribution opportunities

Understand and protect digital rights management

Note: Data derived from interview with Humber College Institute of Technology & Advanced Learning.

International Academy of Design and Technology (IADT)

The International Academy of Design and Technology, in conjunction with the Toronto Film School, offers a one-year Entertainment Business Management program. The curriculum for this program is designed to prepare students for a career in the music industry with an emphasis on communications, management techniques, and problem solving.

<http://www.iadt.ca/programs/>

Skills offered at International Academy of Design and Technology (IADT)

Solicit and assess songs

Assess creator's business and earning potential

Define and understand the nature of contracts

Negotiate contracts

Execute contracts

Register works

Negotiate adaptations and translations

Obtain or issue sampling clearances

Monitor use of copyright

Address infringement issues and resolve disputes

Accounting ability to track, collect and pay out royalties

Develop and execute a sales strategy to exploit and promote repertoires

Provide creative advice and mentoring

Contribute to career goal setting and development of the artist

Develop sheet and printed music

Work with other music publishers to develop policy and advocate for the industry

Secure funding and plan finances

Manage human resources

Comply with business laws, regulations and practices

Administration skills like set up banking, secure insurance, and establish and maintain inventory and delivery systems

Project management skills

Develop digital marketing and distribution opportunities

Understand and protect digital rights management

Note: Data derived from interview with International Academy of Design and Technology (IADT).

Metalworks Institute of Sound and Music Production

The Entertainment Business Management Program at Metalworks Institute trains students in the business aspects of the music industry. The curriculum covers marketing, accounting, computer skills and industry-specific courses. The institution is located in Mississauga and the program duration is one-year divided into three terms of fourteen weeks each for a total of over 1000 hours of instruction.

<http://www.metalworksinstitute.com/welcome/welcome.aspx>

Skills offered at Metalworks Institute of Sound and Music Production

Solicit and assess songs

Assess creator's business and earning potential

Define and understand the nature of contracts

Negotiate contracts

Execute contracts

Register works

Monitor use of copyright

Accounting ability to track, collect and pay out royalties

Develop and execute a sales strategy to exploit and promote repertoires

Provide creative advice and mentoring

Contribute to career goal setting and development of the artist

Work with other music publishers to develop policy and advocate for the industry

Secure funding and plan finances

Comply with business laws, regulations and practices

Project management skills

Develop digital marketing and distribution opportunities

Understand and protect digital rights management

Note: Data derived from interview with Metalworks Institute of Sound and Music Production.

Trebas Institute

Trebas Institute, with campuses located in Toronto and Montréal, offers a nine-month program in Entertainment Management to prepare students for a career in the entertainment industry with a strong emphasis placed on the music industry. This hands-on program has an internship component. The program is offered in both French and English at the Montréal campus.

<http://www.trebas.com/>

Skills offered at Trebas Institute

Define and understand the nature of contracts

Negotiate contracts

Execute contracts

Register works

Obtain or issue sampling clearances

Monitor use of copyright

Address infringement issues and resolve disputes

Accounting ability to track, collect and pay out royalties

Develop and execute a sales strategy to exploit and promote repertoires

Contribute to career goal setting and development of the artist

Develop sheet and printed music

Comply with business laws, regulations and practices

Develop digital marketing and distribution opportunities

Note: Data derived from interview with Trebas Institute.

Professional development

This section provides brief descriptions of provincial organizations and conferences across Canada that organize or offer workshops/seminars aimed at professional development based on a review of information available on those organizations' websites.

Provincial organizations

Provincial music industry organizations support the development of the local music industry by providing a variety of programs and services such as resource centres, networking opportunities and advocacy. Some organize professional development seminars for the music industry, but the seminars are generally offered in a "one-off" format and may or may not directly deal with music publishing.

The following provincial music industry associations operate in Canada: Music BC, MusicYukon, Alberta Recording Industries Association, Saskatchewan Recording Industry Association, Manitoba Audio Recording Industry Association (MARIA), Association québécoise de l'industrie du disque, du spectacle et de la vidéo (ADISQ), Music / Musique New Brunswick, Music Industry Association of Nova Scotia, and Music Industry Association of Newfoundland and Labrador.

Organizations and conferences hosting informal training sessions

Guild of Canadian Film Composers (GCFC)

The GCFC works to protect the rights and interests of composers in Canada, and around the world. It also acts on behalf of its members in negotiations with producers, broadcasters, government agencies, and other relevant entities. The GCFC offers professional development workshops improve the quality of music for film, television, and new media. Topics explored in these seminars that relate to music publishing include an introduction to film scoring, new technologies and music publishing software programs.

http://www.gcfc.ca/index_01.html

Society of Composers, Authors and Music Publishers of Canada (SOCAN)

SOCAN licenses the use of copyright-protected musical works in Canada, collects fees on behalf of its members and distributes royalties to those members and affiliated societies internationally. Formed in 1990, SOCAN is the result of a merger between The Composers, Authors and Publishers Association of Canada (CAPAC) and the Performing Rights Organization of Canada (PROCAN). SOCAN offers information sessions to music creators and publishers about its services and topics related to copyright and music licensing.

<http://www.socan.ca/jsp/en/index.jsp?homepage=1>

Songwriters Association of Canada

The Songwriters Association of Canada is a national arts service organization dedicated exclusively to Canadian composers, lyricists and songwriters.

<http://www.songwriters.ca/index.php>

Association des professionnels de l'édition musicale (APEM)

Cette association d'éditeurs musicaux dont la création est une première au Québec et au Canada français s'est donné comme objectifs de regrouper les professionnels de l'édition musicale, étudier, développer et défendre les intérêts des professionnels de l'édition musicale et poursuivre la reconnaissance nationale et internationale du métier d'éditeur musical.

<http://www.apem.ca/>

Future of Music Coalition

The Future of Music Coalition is a not-for-profit collaboration between members of the music, technology, public policy and intellectual property law communities. The FMC seeks to educate the media, policymakers, and the public about music / technology issues, while also bringing together diverse voices in an effort to come up with creative solutions to some of the challenges in this space. The FMC also aims to identify and promote innovative business models that will help musicians and citizens to benefit from new technologies.

<http://www.futureofmusic.org/>

kisquared



Folk Alliance

Folk Alliance is the service association for the field, and works on behalf of the folk music and dance industry year round. Its advocacy efforts tackle issues important to the folk arts community. It offers a business directory of contacts for members, and a non-profit group exemption program for US-based organizations.

<http://www.folkalliance.org/>

Canadian Country Music Association

The Canadian Country Music Association (CCMA) is a federally chartered, non-profit professional trade organization whose purpose is to: protect the heritage of; advocate the development of; and enact laws favourable to the Canadian country music industry domestically and internationally. It also provides professional development support for rising talents in the industry through its sponsorship of Showcases and a Songwriters' Café at the Country Music Week.

<http://www.ccma.org/>

Canadian Music Publishers Association (CMPA)

Since 1949 the Canadian Music Publishers Association (CMPA) has ensured the views of music publishers working in Canada and its members are heard. It is our mission to promote the interests of music publishers and their songwriting partners through advocacy, communication, and education.

<http://www.musicpublishercanada.ca/>

Music Industries Association of Canada

The Music Industries Association of Canada (MIAC) is a national, non-profit, trade association representing Canadian manufacturers, distributors and retailers of musical instruments and accessories, keyboards, sound reinforcement products and published music.

<http://www.miac.net/>

Music and Film in Motion

Music and Film in Motion is a non-profit organization with a mandate to foster the development and promotion of the music and film industries in Northern Ontario. As a development agency, MFM seeks to create economic development opportunities in Northern Ontario through the cultural industries.

<http://www.musicandfilminmotion.com/>

Nashville Songwriter Association International

The Nashville Songwriters Association International (NSAI) consists of a body of creative minds, including songwriters from all genres of music, professional and amateur, who are committed to protecting the rights and future of the profession of songwriting, and to educate, elevate, and celebrate the songwriter and to act as a unifying force within the music community and the community at large.

<http://www.nashvillesongwriters.com/>

Manitoba Audio Recording Industry Association

Since 1987, the Manitoba Audio Recording Industry Association (MARIA) has promoted the work of Manitoba artists and has provided professional development services to help music industry workers succeed as cultural entrepreneurs. Through its programs and services, MARIA helps people in the music industry find their community and build sustainable careers.

<http://www.manitobamusic.com/>

Canadian Recording Industry Association

The Canadian Recording Industry Association (CRIA) is a non-profit trade organization that was founded in 1964 to represent the interests of Canadian companies that create, manufacture and market sound recordings.

<http://www.cria.ca/>

Association québécoise de l'industrie du disque, du spectacle et de la vidéo

Fondée en 1978 pour défendre les intérêts de ses membres et favoriser le développement de l'industrie de la musique au Québec, l'Association québécoise de l'industrie du disque, du spectacle et de la vidéo (ADISQ) est une association professionnelle sans but lucratif.

<http://www.adisq.com/>

Canadian Music Week

Canadian Music Week is the largest convention related to the music industry in Canada. The conference panels provide professional development opportunities for individuals working in radio, music television broadcasters, music manufacturers, record companies, music retailers and distributors, new media/Internet producers, concert promoters, venue managers, music and video producers, recording artists, and musicians.

<http://www.cmw.net/cmw2006/conference.asp>

North By Northeast Music and Film Festival

Started in 1994, North By Northeast (NXNE) holds an annual conference dedicated to music and film in Canada. Industry panels cover a variety of topics of interest to participants working in the music industry while also providing conference participants the opportunity to network.

<http://www.nxne.com/index.html>

South By Southwest Festivals and Conferences

South By Southwest (SXSW) is comprised of three separate events held back-to-back: South By Southwest Music and Media Conference which is now in its 20th year; South By Southwest Film Conference, and the South By Southwest Interactive Festival. The Music and Media Conference hosts musical acts and provides panel discussions on issues related to the music industry.

<http://2006.sxsw.com/>

Country Music Week

For almost 30 years, Country Music Week has been held in Canada to celebrate the achievements of country music in Canada. During Country Music Week, a conference is held to provide an opportunity for networking and to attend seminars on a variety of topics. A Songwriters' Café is also held to provide insight into writing songs.

<http://www.ccma.org/ccmatoday/cmw/index.htm>

Canada's Music Awards

Also known simply as the Juno Awards, this annual event typically includes seminars such as the Songwriters' Circle to provide participants an opportunity for informational sessions during the Awards weekend.

http://www.junoawards.ca/06_2006_weekend.php

Western Canadian Music Awards / East Coast Music Awards

The Western Canadian Music Awards (WCMA) is hosted by the Western Canadian Music Alliance each year. The WCMA's predecessors include the Prairie Music Awards and the West Coast Music Awards. Now in its fourth year, the WCMA hosts associated conference panels organized into two streams: beginner and advanced. The East Coast Music Awards (ECMA) are presented annually by the East Coast Music Association. Like the WCMA, the ECMA has an associated conference accompanying the awards ceremony.

<http://www.westerncanadianmusicawards.ca/>
<http://www.ecma.ca>

Folk Alliance Canada

Folk Alliance Canada is the Canadian branch of the North American Folk Music and Dance Alliance and is dedicated to the promotion of folk music. Folk Alliance Canada organizes a conference for showcasing artists, with networking opportunities and workshops primarily targeting musicians and managers on such topics as International Market Preparedness.

<http://www.folkalliancecanada.org/rendez/index.htm>

Ontario Council of Folk Festivals

The Ontario Council of Folk Festivals hosts conferences for Ontario's folk, roots and traditional music community. Held annually over a weekend, participants enjoy networking opportunities, speakers, seminars, roundtable discussions, informal meetings, performer showcases and jam sessions.

<http://www.ocff.ca/conference.htm>

The Blues Summit

Hosted by the Toronto Blues Society, the Blues Summit is a conference for the blues community to provide networking opportunities and professional development seminars while also showcasing concerts. The Blues Summit is the largest gathering in the blues music industry in Canada.

<http://www.torontobluessociety.com/summit/index.html>

Appendix C: Verbatim responses

Figure 33 ARE THERE ANY SKILLS OR SKILLS TRAINING WE HAVE MISSED SPEAKING TO YOU ABOUT, OR THAT YOU THINK MAY BE REQUIRED IN FUTURE?

Already mentioned in skill set

Exploit copyrights.

Working knowledge of publishing and music industry. Changing technology.

Securing rights to songs - royalty.

Technology focus - new methods and media.

Website marketing technique and sales skills.

Administration training.

Registering for performance royalties.

Leveraging banks and investors.

Digital and mobility.

Fundamental theory in digital copyright.

Human resources management.

How to do distribution, marketing and copyrighting.

Copyright issue.

More questions about collecting royalties.

Governance for associations financial. Literacy training.

Digital - ramifications of kids downloading.

Music copyright.

More print music questions.

Salesmanship. Maximizing income. Marketing opportunities.

Learning about music publishers in the new media, i.e. ring tones, tow tones.

New rights: private copyright and evolution of new technologies.

The evolution of technology.

Negotiation and publishing skills.

How to get royalties.

Overall administration.

Computer applications

Tracking of any music - computer package.

Computer skills.

Computer skills - taking advantage of what there is

Engraving - learning computer skills to copy and print.

Web site communication.

Computer applications, databases, accounting software.

Missing skills, continued...

Songwriting skills

Ability to write and arrange music.

Music skills

Ability to identify tunes by ear.

Music skills.

Networking

Networking skills.

Networking - business training.

Building networks.

Communication and interpersonal skills

People skills.

Communication skills.

Accessing international markets

Understanding the market trend and overseas market opportunities.

Understanding international markets.

Synchronization rights

Ability to deal with copyright issue in film industry.

Other

More intellectual property protection.

More than just a marketing component.

Pitching of songs.

More training in general.

Sales and customers services.

Diversifying catalogs for copyrights.

Experience.

Ability to learn as you go.

Ethics in the music industry.

Common sense.

Always something to learn.

How to get music specific artists.

Stay out of publishing.

None

N/A **(73 responses)**

None. **(9 responses)**

No. **(5 responses)**

Nothing. **(2 responses)**

Nothing else to add. **(2 responses)**

No, it's complete.

Do not know / refused (2 responses)

Figure 34 *WHAT WAS THE NAME OF THE INSTITUTION WHERE YOU PARTICIPATED IN A FORMAL TRAINING PROGRAM?*

Fanshawe College **(4 responses)**

Harris Institute **(2 responses)**

Selkirk College

Berkeley College

UCLA

NYU

Simon Fraser University

Grant MacEwan College

Okanagan College

York

Ryerson University

Toronto Film School

Institute National de l'Image et du Son

College Vanier

Association des professionnels de l'édition musicale

Association Québécoise de l'industrie du disque, du spectacle et de la vidéo

Association des professionnels de l'édition musicale

Figure 35 WHAT SKILL OR SKILL SET DID YOU LEARN AT ANY CONFERENCE OR WORKSHOP RELATED TO PROFESSIONAL DEVELOPMENT YOU HAVE ATTENDED IN THE PAST YEAR?

Understand and protect digital rights management
Digital rights. (2 responses)
Internet copyright.
Digital right management.
Digital management.
Digital Copyright.
Broader view of digital rights.
Develop digital marketing and distribution opportunities
Music publishing and digital distribution.
Internet publishing skill.
Digital trade show.
Digital opportunities.
Develop and execute a sales strategy to exploit and promote repertoires
Marketing. (2 responses)
Shoestring promotion and media packages.
Promotion marketing.
Pitching of songs.
How to do marketing.
How to connect with international markets.
Developing marketing strategies.
Soliciting and assessing songs
Panel of publishers who listened songwriters' material and critiqued it and jury member on factor.
Evaluate songs for NSAI.
Assessing music.
Industry trends and developments
Open discussion about what is new.
New updates.
Industry trends.
General music publishing
General information. (2 responses)
The publishing in general.
More information on existing knowledge.
Knowledge of the publishing environment.
Everything in the music industry.
Edition en general, six course.
Doing business in music industry.
Basics.

Conference / workshop skills, continued...

Synchronization rights

TV and movie placements.

TV and movie contracts

Synchronization rights - TV and films.

Movies.

International movie rights.

Film and TV placement.

Film and TV music licensing.

Overview of networking

Networking. **(5 responses)**

Overview of networking.

Network.

Accounting ability to track, collect and pay out royalties

How SOCAN was collecting royalties.

Dealing with royalties.

Secure funding and plan finances

Securing funding for grant applications.

How to apply for grants.

Copyright management

Copyrights. **(2 responses)**

Enhanced copyright.

Copyright management.

Defining and understanding the nature of contracts

Practical music licensing.

Contracts.

Contract negotiation and development.

Contract management.

Business contacts.

New digital technology

New digital technology.

Current state of the digital music industry.

Song writing skill

Song writing technique.

Song writing skills.

Management skill

Management. **(2 responses)**

Address infringement issues and resolve disputes

Skills regarding copyright infringement issue.

Conference / workshop skills, continued...

New media

New Media. (2 responses)

Other

Strategies and administering taxes.

Samples.

Packing.

Digital - varied.

Communication skills.

Common sense.

Anti-piracy.

None

Not applicable. (3 responses)

Waste of time.

Figure 36 WHO OFFERED THE TRAINING AT THE CONFERENCE OR WORKSHOP?

Canadian Music Publishers Association. (9 responses)
Music and Film in Motion. (7 responses)
Society of Composers, Authors and Music Publishers of Canada. (6 responses)
South by Southwest. (4 responses)
Canadian Music Week. (3 responses)
Canadian Country Music Association. (3 responses)
East Coast Music Association. (3 responses)
Nashville Songwriter Association International. (3 responses)
West Canadian Music Award. (2 responses)
Association des professionnels de l'édition musicale. (2 responses)
Manitoba Audio Recording Industry Association. (2 responses)
Trader Roots Canadian Country Music Award.
Canadian Recording Industry Association.
Canadian Heritage.
Ontario Council of Folk Festivals.
ASCAP.
Trebas Institute.
Cultural Human Resources Council.
Music Industry Association of Canada.
APSM - Association of Professional Shansom Music.
Retail, Print and Musical Distributing Association.
Canadian Country Songwriters Association.
National Folk Alliance.
One Stop Shop.
Association du disque, de l'industrie du spectacle Québécois et de la vidéo.
Future of Music.
Western Canada Music Association.
Songwriter's Association of Canada.
Blues Society.
Guild of Canadian Film Composers.
I don't know. (7 responses)

Figure 37 WHAT WOULD YOU SAY ARE THE GREATEST TRAINING NEEDS RIGHT NOW OR IN THE FORESEEABLE FUTURE?

Administration skills

Good publisher administration.

Administration.

Administration training.

Management.

Organizational skills.

Managing paperwork.

Administrative skills.

Obtain or issue sampling clearances

Law of sampling and electronic music.

Secure funding and plan finances

Understanding how the income is generated.

Secure funding.

Financial aspect.

Funding for independents.

Understanding revenue streams of publishing.

Register works

Registration of music.

Develop digital marketing and distribution opportunities

Digital distribution. **(3 responses)**

Digital exploitation.

Internet marketing.

Digital media - selling music through the Internet.

Understanding how digital market all works.

International electronic publishing.

Interface with digital.

Digital Marketing.

Digital notation, marketing and promotion, websites.

She would like songs to be published via the Internet.

Understand and protect digital rights management

Digital copyrights. **(5 responses)**

Understanding in digital rights. **(4 responses)**

Digital rights. **(4 responses)**

Digital copyright regarding online downloading. **(2 responses)**

Digital rights protection.

Knowing, understanding and applying digital media copyrights.

Greatest training needs, continued...

Understand and protect digital rights management (continued)

Digital music models.

Digital rights and copyrights.

Digital downloading rights.

Digital era, copyright.

Management of rights. Management of the digital environment.

New digital rights.

Information of new rights and evolutionary technology. How technology is evolving each day, it becomes necessary to adapt through the provision of information.

Pirating. Copyright (Internet and new media).

Digital - government interference.

Copyright protection of digital.

Copyright of Internet networking.

Digital delivery regarding collecting royalties.

Teaching copyright for digital downloads.

Develop and execute a sales strategy to exploit and promote repertoires

Marketing needs to be published more. Lack of focus for regions outside Vancouver and Toronto.

Marketing of work.

Developing marketing strategies.

Marketing and promotion awareness.

Pitching of songs.

Understanding in marketing issues.

Marketing - low budget segment client base.

How to get work heard.

Marketing.

Distribution of copyright.

Methods and strategies to develop an artist's career, i.e. marketing.

Get into new markets and new uses.

Exploitation.

Expertise in promotion, publicity

Solicit and assess songs

More talent agents to be discovered.

Knowing great songs.

Ability to pick right songs.

Good material.

Talent identification.

Accessing artists.

Greatest training needs, continued...

General music publishing

Two days workshop in music publisher is helpful to address training need.

The overall training.

Music publishing skills.

History of publishing.

Books from US - everything.

More formal training required

Formal training.

Training aids for education institutions.

Defining and understanding the nature of contracts

Independent music publisher and writer will need to learn most and be able to negotiate a deal so they aren't taken over by publisher. Writer has a greater role.

Understanding contracts.

Dealing with contracts, as there are no entertainment lawyers in Saskatchewan.

Contract management.

On the job training

On the job trainings.

Hands on training through trial and error.

Song writing skill

Training more composers to write songs.

Song writing skills.

Understanding copyright protection

Copyright infringement.

Understanding the copyrights in general.

Legal issue about sub-publishing.

Protection of artist rights.

Knowledge of copyright.

Understanding copyright laws.

Copyright issues.

Need to define rights, royalties, licensing and copyrights.

Understanding copyright.

All facets of copyrights.

Copyright protection.

Neighbouring rights.

Ability to adapt to copyrights.

Copyright protection, regulations.

Copyright management.

Greatest training needs, continued...

Understanding copyright protection (continued)

Copyright knowledge.

Accuracy. Knowledge. Misunderstanding of copyright.

Protecting copyright.

Copyright law.

Working with royalty collection organizations

Collection agencies.

Understanding limitation of SOCAN copyrights.

Networking within the industry

Networking. **(3 responses)**

Making connections.

Real network opportunity.

Understanding the music industry

Understanding music industry.

Understanding the business.

Understanding music business.

Accounting ability to track, collect and pay out royalty

Royalty collection. **(2 responses)**

Royalty legislation.

Promoting live performance

Promoting through live performance.

Live performance.

Synchronization rights

Agreements - sync right.

TV and movies

Project management skills

Project management.

Other

Educating with respect to new technologies and media.

Bringing new and young people to the business.

More accessible training and more workshops.

Skills in customer relations.

Music publishers joining union issue.

Ear training - traditional fiddle music.

Diversifying musical tastes.

Comprehension of new business models.

Greatest training needs, continued...

Other (continued)

More opportunities for business skills in Canada.

Software programming.

Formal musical skills.

Technology.

Being more aware of what music publishers in other countries and doing in terms of pricing and marketing.

Transparency to work with Canadian Music Association.

New media. Online media.

Get artist to understand the royalties.

Classical music.

How to intervene with record labels.

None

Not applicable. **(8 responses)**

No.

No needs.

Do not know / refused

I don't know. **(12 responses)**

Not sure.
