

MINISTRY OF JOBS, TOURISM AND SKILLS TRAINING
AND MINISTER RESPONSIBLE FOR LABOUR
INFORMATION NOTE

Cliff #: 112198

Date: February 23, 2016

PREPARED FOR: Honourable Shirley Bond, Minister of Jobs, Tourism and Skills Training and Minister Responsible for Labour

ISSUE: New \$15 million BC Music Fund

BACKGROUND:

B.C.'s music industry contributes to the cultural fabric of the province as well as attracting talent to our growing technology and tourism sectors helping to diversify our strong economy. The B.C. Music Sector Profile report by PwC estimated B.C. music industry revenues of over \$400 million in 2014.

British Columbia has the third largest concentration of independent labels, sound recording studios and other music businesses in Canada. The three major labels (Sony, Warner and Universal) all have a presence in B.C. and the province has a reputation inside the music business for its top recording studios. The music industry in B.C. also delivers significant tourism benefits when visitors spend on concerts, music festivals as well as on food and beverage purchases, hotel accommodations, local attractions and more.

In February 2016, Music Canada released a report on B.C.'s music sector. The report, titled "From Adversity to Opportunity," provides a roadmap to "reclaim B.C.'s proud music heritage and ignite its potential as a cultural and economic driver." Music Canada, a Toronto-based non-profit trade organization, led the research and development of the report with extensive input from leaders in music, business and government in B.C. Consultations with the Ministries of Community, Sport and Cultural Development, Education, Finance, Jobs, Tourism and Skills Training and Small Business, Red Tape Reduction, as well as the Premier's Office, were pivotal in developing the report's recommendations. The BC Chamber of Commerce also provided guidance and support in the preparation of the report.

Music Canada's report suggests that a \$15 million investment will produce an estimated total GDP impact of \$73 million for B.C.'s economy.

DISCUSSION:

On February 11, 2016, in response to Music Canada's report, Premier Christy Clark announced a \$15-million grant toward the creation of a BC Music Fund to help support various activities in British Columbia's music industry. The BC Music Fund will be administered through Creative BC and will support activity in the music sector to help

diversify B.C.'s economy, stimulate foreign direct investment, enhance music tourism, stimulate the creation and retention of jobs and encourage increased activity in regional centres.

The funding will be provided to Creative BC under a Shared Cost Agreement with the following deliverables:

1. To carry out creative sector programming in support of the BC Music Fund in partnership with Music Canada. The programs supported by the BC Music Fund will focus on the following categories of services:
 - Sound recording;
 - Live music performances;
 - Distant location tour development;
 - Investments to enhance music production and programming; and
 - Industry development.
2. Other strategic projects with the approval of the province.

In order to receive funding, Creative BC must report to the province by March 31, 2016 with a project plan in support of the BC Music Fund programming. The project plan is subject to approval by the province. ^{s.13,s.17}

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Creative BC shall also report on the disbursement of the funds at a minimum on an annual basis, or as required by the Province.

NEXT STEPS:

A Shared Cost Arrangement between the Ministry of Jobs, Tourism and Skill Training and Creative BC that outlines the \$15 million BC Music Fund program has been finalized and signed. ^{s.13,s.17}

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ATTACHMENTS: Appendix 1: Fact Sheet: B.C.'s Music and Sound Recording Sector

Contact: Okenge Yuma Morisho, ADM, Economic Development Division, JTST
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Prepared By: Karen Lamare, Economic Development Division
Telephone: 604-506-3520

Reviewed by			
A/ED: VS	ADM: OYM	DM: AM	MIN:

Appendix 1

Fact Sheet: B.C.'s Music and Sound Recording Sector

- British Columbia has a large and diverse talent pool of artists who perform a wide range of music genres; pop, rock, classical, blues, folk and jazz predominate, with obvious influences resulting from the large multi-ethnic community in the province.
- In addition to the artists who create the music, the music industry in British Columbia is made up of 58 independent record labels, 123 sound recording studios and hundreds of music publishers, managers, talent agencies, marketing and other businesses that support the development and delivery of music.
- In British Columbia, independent record label producers, sound recording, publishing and live performances generate the majority of industry revenues.
- The PWC Music sector study estimated that industry revenues from the music sector in 2014 exceeded \$400 million. Additional music industry revenue is also generated from:
 - agent and manager fees;
 - sales of physical and digital music products;
 - musical compositions for film, television and commercial productions;
 - radio station programming expenditures; and
 - Digital music services.
- The industry also includes many non-profit performing organizations such as the Vancouver Symphony Orchestra, which employs large numbers of musicians, produces recordings and engages in live performances.

Key Strengths of BC's Music and Sound Recording sector include:

- Broad and diverse talent base: Diana Krall to Mother Mother, Hedley to Terry McBride, Sarah McLachlan to Carly Rae Jepsen, Bob Rock to Bruce Fairburn;
- State-of-the art infrastructure and critical mass of music related businesses: the Armoury and Warehouse studios;
- Mix of established and emerging labels: 604, Mint, Boompa;
- Cultural diversity of the province: Indian, Greek, Persian, Aboriginal;
- Educational institutions: Nimbus school of recording and media;
- Proximity to key markets: Los Angeles, Seattle;
- Strong, well-established links with other creative industry sectors: film, TV, gaming, digital media, advertising;
- Active and effective industry association: Music BC; and
- Innovative artist development program: Peak Performance project.

MINISTRY OF JOBS, TOURISM AND SKILLS TRAINING
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MEETING NOTE

Cliff #: 112173

Date: March 13, 2016

PREPARED FOR: Deputy Minister Shannon Baskerville.

DATE AND TIME OF MEETING: April 13, 2016, 3.30-4.00pm.

ATTENDEES: Graham Henderson, President & CEO, Music Canada.

ISSUE(S): Follow-up to BC Music Fund Announcement.

BACKGROUND:

A February 2016 report released by Music Canada suggested a vibrant music sector could significantly drive economic growth in B.C. In response, the Premier announced a \$15 million BC Music Fund on February 11, 2016. The Fund has been designed to boost B.C.'s music industry by increasing activity in the sector, stimulating foreign direct investment, enhancing music tourism, and supporting the creation and retention of jobs.

The Fund will be distributed over a two-year period (beginning April 1st) by Creative BC through four program streams:

- Music company development: business development to expand the capacity of B.C.-based music companies;
- Live performance: development, programming and promotion of live music experiences in B.C.;
- Distant location tour/export market development: tour support for B.C. artists to travel to locations within and outside of Canada; and
- Industry development: support the development of new music sectors, artist entrepreneur training, and export/marketing strategies.

Based on the findings in Music Canada's report, it is anticipated this \$15 million investment will produce an estimated total GDP impact of \$73 million for B.C.'s economy.

DISCUSSION:

Based on a recommendation for more music education in the Music Canada report, the Ministry of Education recently hired a coordinator to develop an arts education program for B.C. schools. ^{s.13,s.17}

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The CMEBC has written to Minister Bond about their interest in supporting music education through the BC Music Fund. JTSTL officials are meeting with the Ministry of Education and Creative BC on April 13th to ensure a coordinated approach. No financial support has to date been requested by the Ministry of Education to support this initiative.

Mr. Henderson may use the opportunity of this meeting to advise the Deputy Minister of his agency's work on this project. In addition to his engagement with the Minister of Education, we understand Mr. Henderson has been in contact with the Ministry of Small Business and Red Tape Reduction. At the time of writing JTSTL officials do not have any details on the substance of these discussions

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SUGGESTED RESPONSE/KEY MESSAGING:

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ATTACHMENTS: Appendix 1: Biography: Graham Henderson

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Prepared By: Asha Bhat, ED, Tourism & Creative Sectors
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Reviewed by		
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Appendix 1: Biography, Graham Henderson

Graham Henderson, CEO and President, Music Canada www.musiccanada.com



Graham Henderson promotes the interests of Canadian record companies and their partners, the artists. Graham is active in policy development and is a frequent speaker on music and intellectual property issues.

Currently Graham is leading Music Canada in an effort to unite a broad coalition of industry members to identify ways to stimulate the growth and promotion of the music cluster in Canada. Music Canada has identified 5 key strategies to grow the music industry: music tourism, music education, digital innovation, export expansion, and tax credits.

In 2013 Graham was inducted into the Canadian Music Industry Hall of Fame and was presented the Queen Elizabeth II Diamond Jubilee Medal. He has been working with artists for 25 years, first as a lawyer specializing in music law and later as Senior Vice-President, Business Affairs and e-commerce at Universal Music Canada. There, Graham managed Universal's e-commerce strategy and was instrumental in the launch of Puretracks.com, Canada's first legal digital music download service. In 2004, he joined Music Canada.

Graham contributes his time on the Boards of Directors of The Corporation of Massey Hall and Roy Thomson Hall, the Ontario Chamber of Commerce and Re:Sound (a music licensing company). He holds a double major in English Literature and Fine Art History from Guelph University. Graham also holds a Master of Arts degree in English Literature and a law degree, both from the University of Toronto.

MINISTRY OF JOBS, TOURISM AND SKILLS TRAINING
AND MINISTER RESPONSIBLE FOR LABOUR
INFORMATION NOTE

Cliff #: 112636

Date: April 1, 2016

PREPARED FOR: Honourable Shirley Bond, Minister of Jobs, Tourism and Skills Training and Minister Responsible for Labour.

ISSUE: Creative BC Roadmap for the B.C. Music Fund.

BACKGROUND:

On February 11, 2016, Premier Christy Clark announced a \$15M grant towards the creation of a two year BC Music Fund to support various economic development activities in the music industry. The BC Music Fund will be administered through Creative BC. Prem Gill, CEO of Creative BC, developed a roadmap for the implementation of the BC Music Fund.(see Appendix1).

DISCUSSION:

The BC Music Fund will include four program streams:

- **Music Company Development:** Business development to expand capacity of B.C.-based music companies (record labels, music publishers, managers, promoters, artists etc.);
- **Live Performance: Development:** programming and promoting of live music experiences in B.C., including tourism strategies for music festivals;
- **Distant Location Tour/Export Market Development:** Tour support for B.C. artists to travel to locations within and outside of Canada; and
- **Industry Development:** Support development of growing new music sectors, artist entrepreneur training and export/marketing strategies.

In addition to the four program streams consideration will be given to proposals that help promote music education.

A Shared Cost Agreement between JTSTL and Creative BC was signed on February 24, 2016.

- \$2M was transferred to Creative BC after the Shared Cost Agreement was signed to be used for undertaking specific deliverables to support emergent priorities within the creative sector.
- The remaining \$13M is allocated to the creation of the BC Music Fund and was transferred on approval of the BC Music Fund Roadmap on March 31, 2016.

NEXT STEPS:

Creative BC is in the process of hiring a BC Music Fund Manager. The BC Music Fund Manager will be a two-year term position, coinciding with the length of the fund. A BC Music Fund Advisory Committee will be established for two-way communications between Creative BC and key stakeholder groups within BC's music industry.

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- Announce the BC Music Fund Advisory Committee and membership
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ATTACHMENTS: Appendix 1: BC Music Fund Roadmap

Contact: Okenge Yuma Morisho, Associate Deputy Minister, Ministry of Jobs, Tourism and Skills Training
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Prepared By: Karen Lamare, Economic Development Division
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ED: AB	Assoc DM: OYM	DM: SB	MIN:

BC MUSIC FUND ROADMAP

This roadmap has been developed by Creative BC to outline key steps for the implementation of the BC Music Fund starting in April 2016. This document was developed by Prem Gill, CEO of Creative BC, with the participation of a working group consisting of representatives from Creative BC, Music Canada and the Ministry of Jobs, Tourism and Skills Training. In developing the document, the working group considered extensive research and outreach undertaken in developing the “BC’s Music Sector: From Adversity to Opportunity” report by Music Canada, and the experiences of other music fund programs, including those in Ontario and Australia.

1. BACKGROUND

On February 11, 2016, Premier Christy Clark announced a \$15 million grant towards the creation of a BC Music Fund to support various economic development activities in the music industry.

The BC Music Fund will be administered through Creative BC and will help support activity in the music sector in British Columbia in order to diversify B.C.’s economy by attracting direct investment, enhancing music tourism, stimulating the creation and retention of jobs and encouraging increased activity in regional centres. Support will focus on sound recording, live music performances, distant location tour development, music tour strategy and industry development.

The BC Music Fund will be distributed over a two-year period beginning April 1, 2016. Creative BC is responsible for designing the fund, which will include granting programs and support for both new and existing organizations. The fund will follow best practices in grants, including robust governance, an establishment of an advisory committee, an organizational structure to support the roll-out of the fund and to run the programs, and a reviewing system to measure success and outcomes.

This roadmap has been developed by Creative BC to outline key next steps for the establishment of the fund.

2. VISION AND OBJECTIVES

The vision and objectives for the BC Music Fund are consistent with Creative BC’s mandate and strategic framework.

VISION

The BC Music Fund will elevate, strengthen and sustain British Columbia’s dynamic music sector.

OBJECTIVES

The BC Music Fund will diversify and strengthen British Columbia’s economy by:

- Attracting direct investment in B.C.’s music industry
- Enhancing live music opportunities for performers and audiences
- Stimulating the creation and retention of jobs within B.C.’s music industry
- Encouraging increased music activity in regional centres
- Promoting B.C.’s music and talent on the national and global stage
- Establishing relevant benchmarks and metrics to measure impact

3. PROGRAM STREAMS

The BC Music Fund will include four program streams. While specific programs will be developed within these streams, activities currently contemplated under each stream are noted below. Specific eligibility and application requirements will be developed for each of the four program streams and outlined in program stream guidelines. Metrics will be determined to measure results for each program.

a. MUSIC COMPANY DEVELOPMENT

- Business development to expand capacity of B.C.-based music companies (e.g., record labels, music publishers, music managers, artist entrepreneurs, music promoters, music presenters, and booking agents)
- Encourage and support sound and video recording activities at studios located in B.C.
- Support improvements to sound and video recording studios located in B.C. (e.g., sound mitigation, sound systems, etc.)

b. LIVE MUSIC PERFORMANCE

- Development, programming and promoting of live music experiences in B.C., including tourism strategies for music festivals and incorporation of music-related activities into broader B.C. tourism strategies
- Improvements or support to existing, proposed or outdoor performance venues in B.C. (e.g., sound mitigation, sound systems, etc.)

c. DISTANT LOCATION TOUR/EXPORT MARKET DEVELOPMENT

- Tour support for B.C. artists to travel to locations within and outside of Canada
- Increased support to existing export market development activities through Music BC and BC Arts Council

d. INDUSTRY DEVELOPMENT

- Support development of growing or new music sectors (e.g., film and game scoring)
- Artist entrepreneur training
- Export development and marketing strategies

The BC Music Fund Manager will also consider innovative proposals for funding received outside of these four streams, provided that they support the vision and objectives of the BC Music Fund. Consideration will also be given to proposals that may not support economic-development objectives but help to build or promote community-based music education or appreciation.

4. GOVERNANCE AND ADMINISTRATION

ADMINISTRATIVE PRINCIPLES

The BC Music Fund will be administered by Creative BC and will benefit from Creative BC's strong track record of efficient and transparent administration built through its other sector programs. Creative BC's approach to administration includes:

- Clear application guidelines and forms, requiring appropriate but not burdensome amounts of information
- Adhering to industry-leading published application processing, award and funding distribution timelines
- Requiring thorough reporting to assist in the measurement of program outcomes

MANAGER FOR BC MUSIC FUND

Creative BC is in the process of hiring a BC Music Fund Manager. The BC Music Fund Manager will be a two-year term position, coinciding with the length of the fund. The BC Music Fund Manager will report to the CEO and will have experience with business practices, marketing and sales development and management methods, techniques and innovative practices, with a special focus on the current development, trends and needs of the B.C. music industry.

The BC Music Fund Manager will be responsible for:

- Developing, implementing, delivering and evaluating programs under each of the four program streams
- Developing a staff resourcing plan for the implementation of the programs
- Coordinating the intake and evaluation of applications, including managing a jury system
- Creating and maintaining a BC Music Fund website – www.bcmusicfund.com (either standalone or linking to a webpage within Creative BC's existing website)
- Developing application materials and guidelines (using Creative BC's existing templates as much as possible)
- Providing written and verbal updates to the CEO and participating in government and industry briefings as needed

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5. BC MUSIC FUND ADVISORY COMMITTEE

A BC Music Fund Advisory Committee will be established for two-way communications between Creative BC and key stakeholder groups within BC's music industry. The purpose of the Advisory Committee is for stakeholder representatives to provide input to Creative BC regarding the BC Music Fund, including the establishment of programs, feedback regarding ongoing success and challenges, administration and suggested corrective actions regarding any issues that may arise. The Advisory Committee is not a decision-making body and as such, participation on the Advisory Committee would not disqualify any member from applying for and receiving funding from the BC Music Fund.

The Advisory Committee will be chaired by the CEO of Creative BC and will have 6 – 8 members. It is anticipated that the Advisory Committee will meet up to four times per year.

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6. COMMUNICATIONS AND STAKEHOLDER ENGAGEMENT

To address interim communications prior to the establishment of programs, Creative BC has assigned a Programs Coordinator to manage enquiries regarding the fund, including establishing an email address (music@creativebc.com).

As a next step, a communications and stakeholder engagement plan will be developed and will include consideration of:

- A web portal with information regarding programs, application forms and success stories (in year two)
- Regular public and stakeholder updates (e.g., launch of program streams, calls for applications, one year anniversary, success stories, etc.)
- Opportunities to leverage business community supporters (e.g., BC Chamber of Commerce opened to tout successes of BC Music Fund at one year anniversary)
- Stakeholder engagement through the BC Music Fund Advisory Committee and directly as part of the development of programs

7. EARLY OPPORTUNITIES

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- Announce the BC Music Fund Advisory Committee and membership

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8. NEXT STEPS

The following table outlines key next steps to be taken by Creative BC in the establishment of the BC Music Fund:

	ACTIVITY	WHO	WHEN
1.	Recruitment of BC Music Fund Manager	P. Gill	<i>Complete – job posted on March 30, 2016</i>
2.	Invitation and confirmation of prospective Advisory Committee members	P. Gill	April 4, 2016
3.	Key stakeholder outreach during JUNO week	P. Gill	March 28-April 3, 2016
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9.	Hire BC Music Fund Manager	Creative BC	May 15, 2016
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APPENDIX 1: TERMS OF REFERENCE – BC MUSIC FUND ADVISORY COMMITTEE

PURPOSE

The BC Music Fund Advisory Committee is a two-way information forum regarding the implementation of the BC Music Fund.

The purpose of the Advisory Committee is to provide industry and experience-based advice to Creative BC regarding the development, design, ongoing success and challenges, administration and communications of programs under four program streams:

- Music Company Development
- Live Music Performance
- Distant Location Tour/Export Market Development
- Industry Development

As the Advisory Committee is not a decision-making body, participation in the Advisory Committee does not preclude Advisory Committee members or their associated organizations from applying for funding.

MEMBERSHIP, TERM AND RESPONSIBILITIES

The Advisory Committee includes the following members:

- Prem Gill, CEO, Creative BC (Chair)
- Amy Terrill, EVP, Music Canada
- Bruce Allen, Bruce Allen Talent
- Sarah Fenton, Watchdog Management
- Patrick Aldous, Vice President, Music BC
- *Representative of Live Music*
- *Representative of Regional Centres*

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MEETINGS

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MINISTRY OF JOBS, TOURISM AND SKILLS TRAINING
AND MINISTER RESPONSIBLE FOR LABOUR
MEETING NOTE

Cliff #: 110427

Date: October 9, 2015

PREPARED FOR: Honourable Shirley Bond, Minister of Jobs, Tourism and Skills Training and Minister Responsible for Labour.

DATE AND TIME OF MEETING: October 14, 2015 at 2:30 p.m.

ATTENDEES: Graham Henderson, President and CEO, Music Canada.

ISSUE(S): Music Canada is preparing a report that will highlight the opportunities and challenges for the BC music industry.

BACKGROUND:

Music Canada is a non-profit trade organization advocating on the behalf of Canada's music industry. It works closely with recording studios, live music venues, concert promoters, regional music associations, and promoters of Canada's music industry.

Music Canada is researching BC's music industry to develop an economic development plan that sustains quality jobs, induces investment, attracts and retains businesses, increases tourism, and attracts and retains young talent in the music industry. Music Canada completed a similar study in Alberta (*Fertile Ground*).^{s.17}
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DISCUSSION:

Music Canada will likely use the meeting to discuss:

1. Increased competition against BC's music industry by Ontario.

Music Canada has often compared support for BC's industry to Ontario's. The Ontario Music Fund (OMF), administered by the Ontario Media Development Corporation (OMDC), was announced in Ontario's Budget 2013 to support and create music industry jobs, and to position Ontario as a recording and performing destination.

The OMF offers \$45M over three years through four grant programs to support music companies, small companies and artists, live music events and industry growth.

Music Canada believes these investments are creating a competitive disadvantage for the music industry in BC, luring artists and major projects to Ontario.

It should be noted that Ontario's music production sector accounts for more than 80 per cent of total national revenues from the music industry, while BC's share represents

approximately 5 per cent. Ontario's commitment of \$45 million represents an ongoing investment into a mature, well established sector hosting the lion's share of the country music production labels (Universal, Sony and Warner.)

BC's much smaller industry has been effectively supported through Creative BC with more than \$300,000 funding (grants programs, core funding and marketing support) over the last two fiscal years. This fiscal, Creative BC has committed more than \$155,000 to support Music BC, allowing the music agency to explore a number of new and emerging export markets. JTST has discussed this issue with Music BC and Music BC has advised they are grateful for the support.

2. Opportunities to grow BC's industry.

Music Canada suggests there is significant opportunity in growing BC's music industry, and would like to share any findings and recommendations from its BC research with the Province to review and action. JTST's ED for Tourism & the Creative Sectors met with the study's lead researcher on October 9th and officials advised him of existing supports for Music BC.

3. Increasing funding to Creative BC and/or create a music fund.

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JTST has previously advised Music BC that no parameters have been placed on the level of support Creative BC is able to provide to the music sector. It is within Creative BC's purview to allocate as much funding as they deem fit from the Ministry's \$2.2 million annual funding. Music BC has similarly been advised no restrictions have been placed on Creative BC in finding additional funding sources. In fact, Music BC was a key partner in Creative BC's successful effort last fiscal to secure marketing funds (\$1.2 million) from Western Economic Development. JTST advised the study's researcher of these successes in the October 9th discussion.

SUGGESTED RESPONSE/KEY MESSAGING:

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- The Province provides Creative BC with \$2.2 million each year, and I am pleased to see they are leveraging this investment to support Music BC and the music industry.
- The Ministry does not dictate how Creative BC uses their resources; they may use their funding as they see fit to assist the entire sector.
- We also encourage Creative BC to seek additional funding sources. Recently, Creative BC secured \$1.2 million in federal funding, with letters of support from my Ministry, and these funds are being used to help the music industry to gain more international exposure.

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- But I am pleased to already see so much progress in BC. I understand Music BC has already completed trade missions to the SXSW (“South-by-South-West”) music festival in Austin, Texas, s.13,s.17
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- I would be pleased to see the study once it is completed. Please feel free to connect with Prem Gill, CEO of Creative BC and Gillian Wood, Executive Director, BC Arts Council if you need further information or assistance; and please do stay in touch with Asha Bhat, Executive Director, Tourism & Creative Sectors in my ministry as your research moves forward.

ATTACHMENTS: Appendix 1: Biography

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Appendix 1 Biography



Graham Henderson promotes the interests of Canadian record companies and their partners, the artists. Graham is active in policy development and is a frequent speaker on music and intellectual property issues.

Currently Graham is leading Music Canada in an effort to unite a broad coalition of industry members to identify ways to stimulate the growth and promotion of the music cluster in Canada. Music Canada has identified 5 key strategies to grow the music industry: music tourism, music education, digital innovation, export expansion, and tax credits.

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Graham contributes his time on the Boards of Directors of The Corporation of Massey Hall and Roy Thomson Hall, the Ontario Chamber of Commerce and Re:Sound (a music licensing company). He holds a double major in English Literature and Fine Art History from Guelph University. Graham also holds a Master of Arts degree in English Literature and a law degree, both from the University of Toronto.