



ANNUAL GENERAL MEETING

2018 ANNUAL REPORT BOOK



LA PLAZA CONGRESS CENTRE
420 RUE SHERBROOKE OUEST, MONTRÉAL, QC
JUNE 4, 5 & 6, 2018

ACP 2018 AGM

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DAY 1, Monday, June 4, 2018: Professional Development Day

8:30 – 9:00 am	Breakfast & Registration	
9:00 – 9:15 am	Welcome Speaker: Glenn Rollans, President, ACP	Les Verrières & Foyer Gouverneur
9:15 – 10:00 am	Morning Keynote: Own Voices But what about the white people? Speaker: Chelsea Vowel (âpihtawikosisân) <i>Chelsea Vowel will talk about the common experiences she (and other Indigenous writers) have in the publishing industry. She will tackle the narrow themes Indigenous writers are expected to write within, the audience they are expected to cater, and issues with editing/publishing Indigenous work.</i> <i>Chelsea Vowel is Métis from maintow-sâkahikan (Lac Ste. Anne), Alberta. Holding degrees in law and education, Vowel's work and writing intersects language, gender, Métis self-determination and resurgence. Through her blog and social media presence as âpihtawikosisân, as well as her writing on current affairs for leading news outlets, she has been an internationally respected commentator on Indigenous-State relations for much of the past decade. For her keynote to the ACP, Vowel will draw from her authoritative 2016 book, Indigenous Writes: A Guide to First Nations, Métis & Inuit Issues in Canada (Highwater Press).</i>	Les Verrières & Foyer Gouverneur
10:00 – 10:45 am	Panel: Publishing Indigenous Works—Focus on Translation Moderator: Matt Williams, Vice President, House of Anansi Speakers: Glenn Bergen, Managing Editor, University of Manitoba Press; Sarah Henzi, Assistant Professor of Indigenous Literatures, Université de Montréal; Suzanne Keeptwo, writer, editor, consultant; Ruth Linka, Associate Publisher, Orca Books <i>A session on publishing Indigenous works with the focus on translation either into or from an Indigenous language, with attention to dual-language editions. Panelists at this session will discuss case studies and best practices around translations and publishing for small language groups.</i>	Les Verrières & Foyer Gouverneur
10:45 – 11:00 am	Break	
11:00 – 11:45 am	Panel: Spotlight on French-English Translation Moderator: Kevin Williams, President & Publisher, Talonbooks Panelists: Luc Bossé, Editor in Chief, Éditions Pow Pow; Caroline Fortin, General Director, Québec Amérique; Simon de Jocas, President, Éditions les 400 coups <i>While Canadian books are enjoyed in dozens of languages around the world, translation opportunities also exist within our borders, serving as a both a source of revenue and a gateway to an expanded Canadian audience. Panelists will explore current trends in the Québec publishing market, what publishers are looking for in the English titles they acquire for translation, and where opportunities lie for English-language publishers.</i>	Les Verrières & Foyer Gouverneur
11:45 am – 1:00 pm	Lunch	

1:00 – 1:45 pm	Presentation: Creating a Safe Workplace Speaker: Julie S. Lalonde <i>In this session, Julie will share her professional insights on creating and sustaining a safe and harassment-free workplace.</i> <i>Julie S. Lalonde is an internationally recognized women's rights advocate and public educator. Julie holds a BA and MA in Canadian Studies from Carleton University and works with various feminist organizations dedicated to ending sexual violence, engaging bystanders and building communities of support. Sponsored by LPG.</i>	Les Verrières & Foyer Gouverneur
1:45 – 2:30 pm	Presentation: Crisis Management 101 Speaker: Andrea Chrysanthou, Director, Strategic Communications, Global Public Affairs <i>"Hope for the best and plan for the worst" is an adage that can't be overlooked in today's business and political environment. At some point, every organization will confront a crisis that has the potential to seriously damage its reputation. Taking the time to invest in proper crisis communications planning is a necessity. This seminar will take publishers step-by-step through what they can do now to prepare for the unexpected.</i> <i>Andrea Chrysanthou is a Senior Communications Specialist in Global Public Affairs' Toronto office where she oversees media relations campaigns and communications support for clients. She is a public relations, marketing and communications specialist with more a decade of experience at some of Canada's top national broadcasters as well as international news organizations. Her background as a journalist and television producer gives her a unique understanding of what media needs to actualize a great story.</i>	Les Verrières & Foyer Gouverneur
2:30 – 2:45 pm	Break	
2:45 – 3:30 pm	Presentation: Preparing for Frankfurt 2020—Rights, translations & co-editions Speaker: Semareh Al-Hillal, Publisher, Groundwood Books <i>This presentation will cover how to decide if an international book fair is right for you—when to go, which fair best suits your needs, what to expect, preparation for the fair, and a breakdown of the post-fair follow-up. It will also cover negotiating a licensing deal, drafting contracts and following through said deals: publication and beyond.</i> <i>Semareh Al-Hillal recently joined Groundwood Books as publisher. Before that she was with Kids Can Press, most recently in the role of associate publisher. She has attended a number of international book fairs, primarily focused on buying rights.</i>	Les Verrières & Foyer Gouverneur
3:30 – 4:15 pm	Member Roundtable: Just Contracts Moderator: Leigh Nash, Publisher, Invisible Publishing <i>A nuts-and-bolts roundtable discussion on rates, rights, royalties and everything in between. The latest in ACP's series of business management roundtables, come prepared with your questions and ready to share best practices with your peers.</i>	Les Verrières & Foyer Gouverneur
5:30 – 7:30 pm	Welcome Reception <i>Hosted by the Association of English-language Publishers of Quebec and sponsored by Marquis Printing.</i>	Taverne Midway 1219 Boul Saint-Laurent

DAY 2, Tuesday, June 5, 2018: Committee Day

8:30 – 9:00 am	Breakfast	
9:00 – 9:45 am	Canada FBM2020 Update Speaker: Gillian Fizet, Executive Director, FBM2020	Les Verrières & Foyer Gouverneur
9:50 – 10:45 am	Department of Canadian Heritage Update Speakers: Michel Côté, Manager, Book Policy & Conor Rossiter, Manager, Support for Publishers; Book Publishing Policy & Programs	Les Verrières & Foyer Gouverneur
10:45 – 11:00 am	Break	
11:00 am – 12:00 pm	Canada Council for the Arts Update Speakers: Chris Toner & Lien De Nil, Program Officers, Supporting Artistic Practice	Les Verrières & Foyer Gouverneur
12:00 – 12:45 pm	Lunch / PD Committee meeting	
12:45 – 1:30 pm	Trade Committee meeting	Les Verrières & Foyer Gouverneur
1:30 – 3:15 pm	ACP Government Relations meeting Speakers: Sean Casey, Global Public Affairs; Tara Mazurk, Global Public Affairs <i>An update on and discussion of ACP's advocacy efforts in Ottawa, including a presentation from Sean Casey and Tara Mazurk, Global Public Affairs.</i>	Les Verrières & Foyer Gouverneur
3:15 – 3:30 pm	Break	
3:30 – 4:15 pm	Export Committee meeting	Les Verrières & Foyer Gouverneur
	Education Committee meeting	Gouverneur I
4:15 – 5:00 pm	Higher Education Committee meeting	Les Verrières & Foyer Gouverneur
	Children's Committee meeting	Gouverneur I
6:00 – 9:00 pm	AGM Banquet <i>Join us to celebrate the successes of the past year and honour our special guests. Reception at 6:00 pm, followed by dinner at 7:00 pm.</i>	Restaurant de l'ITHQ, 3535 Rue Saint-Denis

DAY 3, Wednesday, June 6, 2018: Plenary Session

8:30 – 9:00 am	<i>Breakfast</i>	
9:00 – 10:30 am	Plenary session All members	Les Verrières & Foyer Gouverneur
10:30 – 10:45 am	<i>Break</i>	
10:45 am – 1:00 pm	Plenary session cont. All members	Les Verrières & Foyer Gouverneur
1:00 – 1:30 pm	<i>Lunch</i>	
1:30 – 2:30 pm	Meeting of newly elected ACP Board of Directors	Les Verrières & Foyer Gouverneur

AGM Plenary Agenda

1. Call to order and approval of agenda
2. Approval of 2017 AGM minutes (p. 8)
3. President's Report (G. Rollans, p. 21)
4. Executive Director's Report (K. Edwards (p. 23)
 - a. Anti-harassment policies
5. Treasurer's Report (S. Al-Hillal, p. 25)
6. Motion to approve all activity 2017-18
7. Government Relations (G. Rollans)
8. Funder Relations (G. Rollans)
9. ACP Strategic Plan (G. Rollans & K. Edwards)
10. eBOUND Canada Report (L. Nash & D. Nelson, p. 51)
11. Industry Reports
 - a. Access Copyright (K. Edwards, p. 82)
 - b. Canada FBM2020 (M. Williams, p. 92)
 - c. Other reports
12. Committee Reports
 - a. 49th Shelf Advisory Group (D. Caron, p. 64)
 - b. Children's Publishing Committee (K. Boersma & A. Wooldridge, p. 66)
 - c. Diversity & Inclusion Committee (A. Crocker & G. Younging, p. 67)
 - d. Educational Publishing Committee (T. Bulger, p. 68)
 - e. Export Committee (M. Pitts, p. 69)
 - f. Higher Education Publishing Committee (W. Antony & L. Dema, p. 72)
 - g. Professional Development Committee (B. Ouellette, p. 76)
 - h. Special Events Committee (S. Al-Hillal, p. 77)
 - i. Trade Committee (L. Fisher, p. 78)
13. Dates and Location for 2019 ACP meetings (S. Al-Hillal)
 - a. Mid-Winter Meeting
 - b. Annual General Meeting
14. Nominating Committee Report (M. Williams, p. 74)
15. Other Business
16. Adjournment

Association of Canadian Publishers
Annual General Meeting
Minutes of the Plenary Session
9:00 a.m., June 7, 2017
Hyatt Regency Hotel, King I
370 King St. W., Toronto, ON

Chair: Matt Williams, House of Anansi/Groundwood Books

Present:

Susanne Alexander, Goose Lane Editions
Semareh Al-Hillal, Kids Can Press
Wayne Antony, Fernwood Publishing
Sheila Barry, Groundwood
Jillian Bell, SaskBooks
Lily Bergh, Canadian Scholars' Press
Todd Besant, ARP Books
Irene Bindi, ARP Books
Karen Boersma, Owlkids Books
Matt Bowes, NeWest Press
Heather Bryan, Nimbus Publishing
Margaret Bryant, Dundurn
Linda Cameron, University of Alberta Press
David Caron, ECW Press
Amanda Crocker, Between the Lines
Bob Dees, Robert Rose
Leslie Dema, Broadview Press
Curran Faris, Fernwood Publishing
Lynn Fisher, University of Toronto Press
Gillian Fizet, Canada FBM 2020
David Gawley, Linda Leith Publishing
Catherine Gerbasi, Portage and Main Press
Annie Gibson, Playwrights Canada Press
Carrie Gleason, Formac
Karen Green, Anvil Press
Carolyn Guy, APMA
Bill Harnum, Pontifical Institute of Mediaeval Studies
Kirk Howard, Dundurn
Barbara Howson, House of Anansi
Vici Johnstone, Caitlin Press
Patricia Jones, Pajama Press
Brian Kaufman, Anvil Press
Holly Kent, OBPO
Kieran Leblanc, BPAA
Linda Leith, Linda Leith Publishing
Anna Leventhal, AELAQ

Kitty Lewis, Brick Books
Jim Lorimer, Formac
Hazel Millar, Book*hug
Jeff Miller, Irwin Law
Leigh Nash, Invisible Publishing
Brendan Ouellette, Annick Press
Melissa Pitts, UBC Press
Lisa Quinn, Wilfrid Laurier University Press
Luciana Ricciutelli, Inanna Publications
Glenn Rollans, Brush Education
Rebecca Rose, Breakwater Books
Krys Ross, eBOUND Canada
Rob Sanders, Greystone Books
Rodger Touchie, Heritage Group
Heidi Waechtler, ABPBC
Howard White, Douglas & McIntyre
Alana Wilcox, Coach House Books
Kevin Williams, Talonbooks
Greg Younging, Theytus Books

Staff:

Kate Edwards, ACP
Emily Kellogg, ACP
Inna Shepelska, ACP

Regrets:

Kelsey Attard, Freehand Press
Simon Dardick, Vehicule Press
Donna Francis, Creative Book Publishing
Ronald B. Hatch, Ronsdale Press
Andrew Wooldridge, Orca Book Publishers

1. Call to order and approval of agenda

Matt Williams (MtW) called the meeting to order at 9:07 a.m.

MOTION to approve the agenda, moved by Wayne Antony (WA), seconded by Catherine Gerbasi (CG). Motion passed unanimously.

2. Adoption of 2016 AGM minutes

MtW asked for additions or changes to the 2016 AGM minutes. Linda Leith (LL) asked to be added to the list of attendees.

MOTION to approve the minute of the 2016, as amended, moved by Matt Bowes (MB), seconded by Glenn Rollans (GR). Motion passed unanimously.

3. President's Report (M. Williams)

MtW tabled his written report, as presented in the 2017 Annual Report Book. He thanked the membership for their participation in the meetings, along with the PD and Special Event Committees for all of their hard work in making the AGM a success. MtW thanked the ACP board for their many contributions to the association. He also thanked the ACP staff for their work on ACP's behalf.

MtW noted that this would be Linda Cameron's (LC) and Krys Ross' (KR) last formal ACP meeting in their respective positions as Director of University of Alberta Press and Executive Director of eBOUND. MtW thanked LC and KR for their contributions to the publishing industry.

MtW opened his report to discussion; none was forthcoming.

4. Executive Director's Report (K. Edwards)

Kate Edwards (KE) referred to her written report, as presented in the 2017 Annual Report Book. She reiterated her thanks to the ACP board, committee chairs, working group members, and all members who supported ACP activities in the last year.

She emphasized her thanks to outgoing board members CG, Bob Dees (BD), and Donna Francis (DF), as well as MtW for his work over the last two years as ACP president. She thanked ACP and eBOUND staff members for their work throughout the year.

KE opened her report to discussion; none was forthcoming.

5. Treasurer's Report (S. Al-Hillal)

Semareh Al-Hillal (SA-H) tabled her written report, as presented in the 2017 Annual Report Book.

SA-H noted that Kirk Howard (KH), along with a few other donors, had made contributions to the new research program reflected in the 2017-18 budget. She added that the fund would be used to support an industry study, and advised that more information about the study would be forthcoming. On behalf of the board, SA-H thanked KH for his contribution in launching this initiative.

The treasurer's report was opened to discussion; none was forthcoming.

MOTION to accept the treasurer's report for the ACP's 2017 AGM, moved by SA-H, seconded by CG. Motion passed unanimously.

MOTION to accept the ACP's financial statements, audited by Bazar McBean LLP, for the year ending March 31, 2017, moved by SA-H, seconded by CG. Motion passed unanimously.

MOTION to appoint Bazar McBean LLP as the auditors for the association for 2017–18, moved by SA-H, seconded by CG. Motion passed unanimously.

MOTION to accept the association's budget for 2017–18, as presented in the 2017 Annual Report Book. Moved by SA-H, seconded by BD.

The motion was opened to discussion. Noting that discussion throughout the meeting could influence the budget, Rob Sanders (RS) suggested tabling this motion until later in the meeting. No objection to this suggestion was forthcoming and the motion was tabled.

MW thanked SA-H for her report.

6. Motion to approve all activity 2016–2017 (G. Rollans)

GR introduced the motion to approve all ACP activity from the past year, which he reminded members is made annually on the advice of ACP's lawyer.

MOTION to approve, ratify, and confirm all acts carried out by the ACP Board of Directors in course of its duties, whether specifically authorized or not, during the past year. Moved by GR, seconded by Bill Harnum (BiH). Motion passed unanimously.

7. Government relations (M. Williams)

MtW referred to the previous day's discussion of government relations and presentation from Global Public Affairs' Sean Casey (SC) and Tara Mazurk (TM), and thanked members for their input. He spoke positively of Global Public Affairs' work on ACP's behalf over the past year, noting that ACP had been active on many fronts in 2016–17.

MtW noted that the submission period for the 2018 Pre-Budget Consultations had just opened, and noted that ACP would make a submission by the August deadline. He reminded members that a Parliamentary Review of the *Copyright Act* is expected in late 2017.

The floor was opened to discussion.

Jim Lorimer (JL) referred to the newly-published book *The Handover* by Elaine Dewar (ED), which investigates the transfer of McClelland and Stewart's ownership to Random House. He suggested ACP commission a report to determine ACP's own role in the M&S case, noting that membership eligibility requirements had been changed to allow M&S to remain an ACP member after the initial sale to U of T and Random House. He observed that *The Handover* does not provide a full assessment of the ownership policy, as it focuses only on cases in which exceptions to the ownership policy were granted, and ownership transferred to foreign owners. JL noted a number of positive sales and succession stories, where Canadian ownership was preserved. For example, he spoke to the case of Douglas & McIntyre, which after events surrounding its bankruptcy, resulted in the establishment of three independent Canadian companies. He suggested ACP report on progress of such the development of a report at the Mid-Winter Meeting to supplement the account given in *The Handover*.

BiH responded to JL's comments about ACP's membership criteria, noting that he, Susan Renouf, and Jack Stoddart had sat on a task force to examine this question in the early 2000s. ACP had originally required 80% Canadian ownership, but had voted to reduce that requirement to 75% to remain consistent with Canadian Heritage's program eligibility guidelines. M&S had remained eligible for ACP membership after the transfer of ownership to the University of Toronto and Random House because the university owned 75% of the shares. He suggested that at the time, ACP members could not predict that M&S would ultimately be acquired and controlled by Random House and, by extension, Bertelsmann, noting that U of T assured the public they were the controlling stakeholders in company and made up a majority of the board.

Rob Sanders (RS) spoke to the importance of the ownership policy and in support of JL's suggestion to commission a report.

GR noted that ACP's advocacy work continues to focus on the importance of the ownership policy and suggested its message to the government has been consistent across the many meetings ACP has had with government officials this year. He spoke to the significance of the M&S case and noted that ACP continues to submit position papers to Canadian Heritage's Office of Investment Review reiterating its support of the ownership policy twice a year. These papers address ownership issues in all aspects of the industry, from publishing to supply chain to retail. He added that these papers are available to members on request, and are distributed to those who have opted in to a mailing list established for this purpose.

RS thanked GR for the update on ACP's advocacy work.

Margie Wolfe (MgW) responded to JL's comments that ACP's membership eligibility requirements had been changed to allow M&S to remain an ACP member. She reiterated BiH's point that ACP's membership criteria had not been specifically changed to accommodate M&S, but rather, to remain consistent with Canadian Heritage's program guidelines. She suggested that ACP focus on future advocacy work regarding Canadian ownership, as well as the importance of investment in the Canadian publishing industry, rather than ACP's membership criteria. She agreed with JL that the success of Douglas & McIntyre's ownership transfer could be highlighted.

David Caron (DC) asked how to access ACP's submissions to Investment Review, and whether ACP had developed a position on Audible.ca. MtW replied that ACP has not yet taken a position on Audible.ca. He replied that ACP's letters to Investment Review are available upon request. He offered to share a list of topics covered in the submissions. DC suggested that the list be added to the lobbying toolkit ACP distributes to members.

SA-H spoke in support of MtW's suggestion to focus on future advocacy work and to broaden the scope of a research initiative to consider the ownership policy more generally. She noted that many positive examples of Canadian publishers changing ownership within Canada could be highlighted.

Rodger Touchie (RT) spoke to the significance of the M&S case, and suggested focusing on the specific case as a first step.

For reference, Krys Ross (KR) noted that in an interview on the podcast "Canadaland," ED had been critical of government support for independent publishers, stating that the model is unsustainable. She suggested that ACP keep this in mind if referring to *The Handover* in advocacy efforts.

Based on the discussion, MtW suggested that the incoming board work to commission a report before the Mid-Winter Meeting on ACP and M&S in the context of the ownership policy. He added that there had been a suggestion to look more broadly at cases of changes of ownership—both those that have been beneficial and those that have been harmful to the industry.

SA-H questioned if such a report was a top priority in terms of ACP time and resources. She suggested focusing on improving ACP's advocacy efforts and requesting increased transparency in the government's assessment of net benefit in the context of exemptions made to the ownership policy.

JL commented that more information about the M&S case could help to inform ACP's future advocacy efforts, and could strengthen ACP's position that the government should be more transparent in its application of the ownership policy. He suggested using *The Handover* as a resource.

Barbara Howson (BaH) cautioned that *The Handover* contained factual errors and advised against relying on the book as an advocacy tool. She spoke in support of SA-H's approach, noting that an assessment of the M&S case could be incorporated into a broader advocacy strategy. She noted the lack of transparency in the government's decision making process surrounding the ownership policy, and emphasized the importance of developing a position on Audible.ca given its plans to enter Canada.

LL spoke in favour of a report in order to gain a more fulsome understanding of the M&S case.

Karen Boersma (KB) spoke in support of SA-H's suggestion to focus on advocacy. Melissa Pitts (MP) agreed, and expressed reluctance to duplicate the research of ED.

Susanne Alexander (SA) supported the idea of the report as outlined by JL. She spoke to the importance of a new approach to advocacy with respect to the ownership policy. She observed the many successful transfers of ownership that have resulted in a positive outcome for the Canadian-owned publishing industry, including Nimbus, ECW Press, and House of Anansi. She suggested ACP highlight these success stories and others in its advocacy work.

MOTION that the ACP board be charged to address the issue of ownership in the Canadian book publishing industry and devote the resources necessary to create a credible report on this subject by an external consultant, moved by SA, seconded by Howard White (HW).

The motion was opened to discussion.

RT suggested a preliminary report be produced in time for the Mid-Winter Meeting, outlining next steps and the possibility of a more extensive report.

SA-H expressed concern that the motion lacked details, and asked for more specific direction. MgW agreed, and asked if SA and HW could offer more clarity.

SA suggested that the board be given flexibility in carrying out the research and that the previous discussion could inform their next steps.

MtW called the question.

In favour: 42

Opposed: 2

Abstentions: 4

Motion passed.

MtW adjourned the meeting for a break 10:40 a.m. The meeting resumed at 10:50 a.m.

8. Funder Relations

MtW referred to the previous day's presentations from Canadian Heritage and the Canada Council and opened the floor to discussion.

RS referred to Julie Fairweather's (JF) update on the Canada Book Fund (CBF), noting that she had suggested the possibility of relaxing certain eligibility guidelines, including lowering the sales minimum for Indigenous publishers and lowering the sales cap for eligible publishers. RS recommended ACP follow this process closely in an advisory role.

Alana Wilcox (AW) asked if current participants in the program would be affected by the proposed changes. MtW replied that this was unclear at this time and noted that JF had stated that she would follow-up with a more formal set of proposals.

DC asked if JF had conducted modelling on how such a change would affect publishers. He recommended ACP conduct its own analysis to determine the effects of any proposed changes.

Lynn Fisher (LF) suggested that greater inclusion of Indigenous and smaller publishers would be a positive outcome from the changes, but expressed concern that larger publishers could be penalized. She agreed with DC that further modelling was needed and spoke to the importance of continuing to lobby for an increase to CBF.

BD referred to JF's discussion of export, noting her suggestion that English-language publishers had lower export sales than French-language publishers. He emphasized the need to consider the differences between the markets for English- and French- language publishers. LF agreed, and noted that French-language publishers' catalogues often include English bestsellers in translation.

MtW commented that ACP will consult with members on possible changes as more information becomes available.

DC expressed concern with the Canada Council's New Funding Model. He noted that several questions had not been addressed in the previous day's presentation, such as the mechanics of the "top-up" and its effect on publishers' cashflow, as well as how book publishers would compete with other disciplines in more general programs like Arts Abroad. AW expressed concern regarding the supplementary funds that will be awarded for the current fiscal year, noting that the information from previous day's presentation conflicted with details presented in the past.

LC reported that representatives ACUP had met with Youssef El Jai (YEJ), Brigitte Fontille (BF) and Chris Toner (CT) earlier in the week. She recommended delivering a strong and consistent message to all Canada Council staff, but noted that it was clear from the meeting that decisions are being made at a more senior level.

MtW reported that ACP had corresponded regularly with Canada Council CEO Simon Brault (SB) outlining publishers' concerns, but had received little in the way of response. He added that vacancies on Canada Council's board had recently been filled, and recommended raising concerns with the board in addition to staff.

LC asked if ACP had sought meetings with members of the Canada Council board in the past. MtW responded that ACP had engaged in some outreach efforts to board members. LC suggested ACP produce lobbying materials to help members request a meeting with a member of the Canada Council board, and include an outline of key talking points. MtW thanked LC for her suggestion.

MtW noted that ACP meets regularly with SB in informal settings. KE noted the challenge of engaging with him, noting that he rarely takes meetings with stakeholders; a dinner with ACP representatives shortly after his appointment was a rare exception. LL suggested ACP continue to pursue a meeting with SB, and other senior Council staff.

9. Publishing Indigenous writers

WHEREAS the work of publishers is all about engaging imagination, and given the ACP's previous commitment to Indigenous editorial agency; BE IT RESOLVED that, by continuing to offer professional development and a forum for discussion, ACP encourages publishers and editors to be vigilant in ensuring that imagination is deployed in a culturally sensitive manner (including sensitivity to other religious, gendered and LGBT communities); and to acknowledge that the basis of an editing and/or publishing relationship is respecting differences, as well as common ground; and that they are responsible for the integrity of the work within the context of community from which it is sourced. Moved by AW, seconded by Todd Besant (TB).

The motion was opened to discussion and passed unanimously.

WHEREAS the ACP membership passed a motion at the 2016 AGM endorsing the Canada Council and Department of Heritage initiatives made in the spirit of reconciliation; and whereas the members recognize that Indigenous people and racialized Canadians are vastly underrepresented in the Canadian publishing industry; and whereas "change does not roll in on the wheels of inevitability"; we direct the ACP board to form a working committee, which shall be open to all interested member publishers, and which shall consult with and collaborate with Indigenous and racialized communities with the goal of finding solutions to this underrepresentation. The committee shall report their findings to the membership at each AGM and mid-winter meeting beginning with the 2018 Mid-Winter meeting. Moved by Amanda Crocker (AC), AW.

The motion was opened to discussion.

RT spoke in favour of the motion, and noted the importance of encouraging Indigenous youth to seek a career in book publishing.

Motion passed unanimously.

10. eBOUND Canada Report (K. Ross)

eBOUND Canada Chair, LC, thanked KR for her work, stressing the importance of the organization. She noted that eBOUND faced a number of challenges, and a discussion of the future of eBOUND would be ongoing.

KR referred to eBOUND's written report, as presented in the 2017 Annual Report Book. She noted that the search for her replacement had begun in order to ensure a smooth transition following her retirement in November. She assured members that she would be available to her successor to answer questions on an ongoing basis.

KR spoke to challenges faced by eBOUND over the past year. She reported that eBOUND had been audited by Canadian Heritage for the 2012–13 and 2013–14 fiscal years, which had resulted in a grant repayment of \$60,000. She also cited the cancellation of the OMD's research fund as a new challenge in securing sufficient revenue to match DCH funding. She noted that eBOUND was actively pursuing new revenue streams and funding opportunities.

KR reported that the staff at eBOUND is stable, noting that all staff members had been with the organization

for at least three years. She reported working closely with Manager of Technology, Shannon Culver (SC), to ensure that she is fully up-to-date on all ongoing projects that will continue after KR's departure.

Despite its financial challenges, KR spoke optimistically about the future of eBOUND and its ongoing projects and initiatives.

KE noted that eBOUND's draft financial statements had been made distributed to members.

MW thanked LC, KR and Leigh Nash (LN) for their work.

11. Industry Reports

a. Access Copyright

KE referred to her written report, as presented in the 2017 Annual Report Book. She noted that the report is presented in her capacity has a member of Access Copyright's Member Advisory Committee, and encouraged members to be in touch with questions, concerns or feedback about Access Copyright.

The report was opened to discussion; none was forthcoming.

b. Canadian Copyright Institute (B. Harnum)

BiH explained that the Canadian Copyright Institute is a coalition which addresses copyright issues. He noted that a major activity of the coalition is its attendance at the biannual WIPO meeting of the Standing Copyright and Related Rights in Geneva. He noted that GR had attended the meeting on behalf of CCI in May. Noting that membership is open to individuals and companies, BiH invited ACP members to consider joining CCI, adding that members are regularly briefed on copyright issues.

GR reported that the recent WIPO meeting was enlightening and comprehensive. He spoke to the rigorous structure of the debates, commenting that a wide variety of interested parties attended the meetings, such as NGOs and user-interest groups, but observed that these groups were given few opportunities to intervene in the proceedings. GR highlighted the participation of technology companies, noting that copyright appeared to be a growing concern in the sector. He thanked CCI for its work on behalf of the industry, and added that ACP's position on copyright is aligned with the Canadian Publishers' Council and Canadian Artists' Representation (CARFAC).

The report was opened to discussion; none was forthcoming.

c. Canada FBM2020 (M. Williams & K. Edwards)

KE tabled the written report, which was circulated in hard copy. She apologized for its omission from the report book, and noted that it would be distributed by email.

The report was opened to discussion; none was forthcoming.

d. Commonwealth Publishers Association (K. Howard)

KH reported that the Commonwealth Publishers Association has met four times: twice in Frankfurt and twice in London. He noted that the association is currently based out of London and run by volunteers. He added that a website was under development and noted that more information about the association's activities would be forthcoming.

The report was opened to discussion; none was forthcoming.

e. Other reports

The other reports as presented in the 2017 Annual Report Book were opened to discussion. JL noted that in a recent presentation to the APMA, CBC Books reported not using BookNet SalesData because the price was too high. He suggested that CBC Books be given access to the data, to improve the accuracy of their reporting.

BaH noted that all other news outlets pay for access to BookNet's bestseller lists, including the *Globe and Mail* and the *National Post*, and providing a revenue stream for BookNet. BaH offered to take JL's concerns to BookNet's board.

12. Committee Reports

a. 49th Shelf Task Force (D. Caron)

DC thanked Craig Riggs (CR) for his written report, as presented in the 2017 Annual Report Book. He spoke to the value of the professional development session with CR and Adrienne Guthrie (AG) earlier in the week. DC added that 49th Shelf's Advisory Group would provide ongoing feedback on the project. DC thanked 49th Shelf staff, KE, and Emily Kellogg (EK) for their work on the initiative.

The report was opened to discussion.

RS asked for clarification on 49th Shelf's sources of revenue.

KE replied that the project is funded by a mix of grant revenue, third party sponsorship, and earned revenue through advertising. She added that some contribution also comes from affiliate sites such as Open Book and All Lit Up. She noted that 49th Shelf was in the second year of a two-year contribution from CBF, and would re-apply for funding in October. She added that 49th Shelf has also received an annual grant from the OMDC to support the project. KE referred to the project revenue pages in the ACP budget, noting that for the coming year \$88,000 was budgeted to come from grants and approximately \$77,000 from other sources.

No further discussion was forthcoming.

b. Children's Committee (K. Boersma)

KB tabled the written report, as presented in the 2017 Annual Report Book. She thanked EK, as well as all committee members and volunteers.

The report was opened to discussion; none was forthcoming.

c. Education Committee (C. Gerbasi)

CG tabled her written report, as presented in the 2017 Annual Report Book. She thanked committee members for their participation, noting that the committee had discussed the recommendations coming out of the LMS study at its meeting the previous day.

The report was opened to discussion; none was forthcoming.

d. Export Committee (M. Pitts)

MP tabled the written report, as presented in the 2017 Annual Report Book. She referred to the previous day's committee meeting, noting that LCB executive director François Charette (FC) had presented on updates and changes for FRMAP funding. She offered the following highlights from FC's report:

- The budget of the FRMAP program has increased to \$900,000/year for a five year period, beginning in 2017–2018, up from \$750,000;
- The Rights Canada catalogue will be published once a year instead of twice;
- A new online rights catalogue is being launched in anticipation of Frankfurt 2020, with title listings offered to publishers at no cost. More details will be forthcoming;
- LCB has a market guide for Germany available at no cost.

MP thanked BaH for her report on the Colombia scouting mission.

MP referred to JF's presentation on export sales, and stressed that it would be important to reiterate to DCH the complexity of measuring export sales in light of currency fluctuation.

BaH noted that ACP would no longer be asked to recommend publishers to participate in LCB trade missions, starting with this fall's mission to Shanghai. Instead, publishers will apply directly to LCB. She noted that publishers will share in the cost, but receive an extra FRMAP delegate slot.

LC asked for clarification on how titles will be selected for inclusion in the new online rights catalogue for Frankfurt. BD will ask FC for clarification.

MgW noted that the Chinese children's book market may grow as a result of changes to China's one-child policy, and spoke to the importance of the Shanghai trade mission.

MP thanked committee members, volunteers, EK and KE.

No further discussion was forthcoming.

e. Higher Education Committee (G. Rollans)

GR tabled his written report, as presented in the 2017 Annual Report Book. He reiterated his thanks to Fernwood Publishing, Jessica Antony (JA), and all volunteers who contributed to the collective display project. He noted that work on the collective display project would continue, and encouraged ACP members to participate.

GR thanked IS and KE for their support of the committee.

No further discussion was forthcoming.

f. Library Committee (D. Caron)

DC referred to the previous day's discussion of LoanStars and library budgets, and thanked committee members for their participation.

RS spoke to the importance of the library market. He asked if a research project on libraries might be possible. KR noted some research was available from eBOUND Canada which will be distributed to the committee.

No further discussion was forthcoming.

g. Professional Development Committee (M. Williams for S. Barry)

MW referred to the written report presented in the annual report book, and thanked the committee for their work on the AGM. He noted that the committee was looking for a new chair or co-chairs. He encouraged members to volunteer for the committee.

No further discussion was forthcoming.

h. Special Events Committee (S. Al-Hillal)

SA-H tabled the committee's written report, as presented in the 2017 Annual Report Book. She thanked Renée Knapp (RK), all members of the committee, and ACP staff. She noted that the Blue Jays game and banquet had been successful events.

SA-H reminded members that a tour of independent bookstores would take place immediately following the plenary session, and encouraged publishers to participate.

GR noted that there had been some discussion of revisiting ACP's strategic plan, and a brainstorming session could be incorporated into the agenda for the Mid-Winter Meeting.

No further discussion ensued.

i. Trade Committee (L. Fisher)

LF tabled the committee's written report, as presented in the 2017 report book. LF thanked EK and KE for their support of the committee.

The report was opened to discussion; none was forthcoming.

13. Dates and locations for 2018 ACP meetings

WA expressed concern regarding ACP holding two constituted meetings a year, citing the cost required to attend two meetings per year.

WHEREAS the ACP voted in 2016 to establish the Mid-Winter Meeting as a duly constituted meeting of members; and whereas geography and resources make it difficult for members from across the country to attend all ACP meetings; BE IT RESOLVED THAT the Mid-Winter Meeting return to an informal meeting of ACP members, rather than a duly constituted meeting, with Special General Meetings to be called as needed, according to the ACP bylaws. Moved by WA, seconded by TB.

The motion was opened to discussion.

RS suggested investigating a way to allow publishers from outside of Toronto to participate in meetings online. He reiterated the reason for the previous year's motion, noting that a duly constituted Mid-Winter Meeting allows ACP to set new priorities between AGMs.

The motion was closed to discussion.

In favour: 44
Opposed: 2
Abstentions: 2

Motion passed.

MOTION that the 2018 ACP AGM be held June 4–6, 2018, in Montreal. Moved by SA-H, Todd Besant (TB) seconded.

In favour: 46
Abstentions: 2

Motion passed.

14. Approval of 2017–18 budget

Nearing the end of the agenda, MtW suggested revisiting the tabled budget motion:

MOTION to accept the association's budget for 2017–18, as presented in the 2017 Annual Report Book. Moved by SA-H, seconded by BiH. The budget was opened to discussion.

BiH asked if the budget needed to be amended in order for ACP to hire a consultant to pursue a report on the ownership policy. KE responded that this expense could likely fall under ACP's communications or government relations budgets, as presented in the budget.

No further discussion was forthcoming.

Motion passed unanimously.

15. Nominating Committee Report (L. Fisher)

LF referred to the nominating committee report, as presented in the 2017 Annual Report Book, and referred to the slate:

2017–18 ACP Board of Directors

Semareh Al-Hillal, Kids Can Press
Wayne Antony, Fernwood Publishing
Karen Boersma, Owlkids Books
Terrilee Bulger, Nimbus Publishing
Lynn Fisher, University of Toronto Press
Sean Guistini, Nunavut Arctic College Media
Leigh Nash, Invisible Publishing
Melissa Pitts, UBC Press
Glenn Rollans, Brush Education
Matt Williams, House of Anansi Press
Andrew Wooldridge, Orca Book Publishers
Greg Younging, Theytus Books

MtW called for nominations from the floor. None were forthcoming.

The slate was accepted by acclamation.

LF explained that officers would be elected by the new board, and presented the Nominating Committee's recommendations:

Executive

President: Glenn Rollans, Brush Education

Vice-President: Melissa Pitts, UBC Press

Treasurer: Semareh Al-Hillal, Kids Can Press

Secretary: Sean Guistini, Nunavut Arctic Press

LF added that the full list of committee chairs and co-chairs is presented in the 2017 Annual Report Book; however, the Nominating Committee is still seeking a chair for the PD Committee.

16. Incoming President's Remarks

GR assumed the chair.

GR thanked MtW for his work as ACP president and presented MtW with a personal gift. MtW thanked GR for the gift, and also thanked the ACP membership and staff. He wished GR luck in his new position.

GR noted that MtW will continue to serve on the new board as past president. GR thanked outgoing board members, CG, DF, and BD, and welcomed new board members WA, Greg Younging (GY) and Terrilee Bulger (TB). GR spoke to the value of the work of the Canadian publishing industry, and spoke to the industry's many contributions to Canadian culture. He expressed optimism in ACP's capacity to continue to support a vibrant independent publishing industry.

15. Other Business

GR called for other business. None was forthcoming.

16. Adjournment

Having reached the end of the agenda, GR adjourned the meeting at 12:36 p.m.

When I summarized the Association of Canadian Publishers' activities, programs and services for the incoming executive director of the Commonwealth Book Publishers Association in London earlier this spring, it sounded a bit improbable. Our advocacy on core issues alone could be a full-time job: with the support of Global Public Affairs, close to a hundred meetings in the previous year with federal legislators, committees and department officials on direct funding programs (the Canada Book Fund and the Canada Council for the Arts), copyright, and the continuing challenge of promoting Canadian ownership in our sector, plus participation in the consultation processes on both NAFTA and the CPTPP, and written submissions on a number of issues.

We now sustain an effort throughout the year in funder relations and policy advocacy based on our experience that our hard-won supports and programs are not automatic, and the right time to fight for them is always now.

Add in to those activities:

- all the professional development programs delivered through our two general meetings and an active mentorship program;
- joint marketing programs including 49th Shelf, our colleague agency eBOUND, shared displays, and staff support and side events for major international book fairs;
- research including our baseline study on the state of the industry and our review of the recent history of ownership in Canadian book publishing;
- support to and participation in FBM 2020, the Book and Periodical Council, BookNet Canada, the Canadian Arts Coalition, the Canadian Copyright Institute, the Coalition for the Diversity of Cultural Expressions, the National Reading Campaign and the International Publishers Association; and
- continual peer support among a warm, collegial, dedicated, persistent, talented and experienced group of professionals.

In order to get all of this done, we leverage membership dues of about a quarter of a million dollars into total revenues of almost a million.

All of this happens through the talent and diligence of our remarkably small and very hardworking staff, our exceptional executive director, Kate Edwards, our dedicated volunteer board, the generous contributions of our members and their staff (chairing committees, mentoring, delivering PDs, sitting on boards, meeting with MPs and appearing at committees), the gifts of our sponsors and donors (gratefully acknowledged in your program materials), and the essential contributions of granting agencies, who we acknowledge with gratitude: the Canada Council for the Arts, the Department of Canadian Heritage, Livres Canada Books, and the Ontario Media Development Corporation.

While it has been a year of constant motion with clear objectives on the table, regrettably we are still struggling in some key areas. Despite a recommendation from the Standing Committee on Finance and a strong, shared position with l'ANEL, we still have no increase to the Canada Book Fund. Despite an unequivocal victory for copyright holders in *Access Copyright v. York University*, we were unable to prompt the education sector to abandon its very damaging policy of unfair copying. And we do not hear echoes of our sustained advocacy on the importance of Canadian ownership in book publishing coming back to us in policy.

I am continually amazed that we have to put as much time into copyright as we do. Strong protection for copyright is a freedom of expression issue, an acknowledgment that important things come from an energetic creative sector when it has reasonable safeguards.

President's Report

We are, however, seeing reflected to us by many members of the Standing Committee on Industry, Science and Technology what I would describe as a new grasp of our concerns with the *Copyright Act*, and of our recommendations for fixing the problems. I thank all the members who have taken the time to submit briefs to the committee, or to appear at its meetings. I also want to extend my thanks to the International Publishers Association for contributing very effectively to this process, in coordination with the ACP and its other Canadian members.

We also see our advocacy work on the CBF reflected in a recommendation from the Standing Committee on Finance to increase the budget for the fund. That recommendation stands.

We'll continue to press on all of these areas in the coming year.

Four members leave our board this year: Semareh Al-Hillal, Lynn Fisher, Andrew Wooldridge, and our Past President, Matt Williams. I'll invite you all to consider what a loss of talent that is for our board. Four immensely talented and accomplished publishers, and tremendous board members. I mark their leaving with great thanks and considerable regret. Fortunately our members provide a splendid pool of talent to fill those spaces.

The ACP's solid financial position and wonderful staff make the job of a board member much less stressful than it might otherwise be. It has been great working with Kate Edwards and her staff—Emily Kellogg, Jazz Cook and Geoff da Silva—this past year. It has also been wonderful to be able to continue to rely on generous, expert support from our past ED, Carolyn Wood. We were sorry to say goodbye to Inna Shepelska earlier this year, and glad that she was following a good opportunity. Many thanks to Inna.

Through all of the struggles, our industry abides. Our members continue to do exceptional work, and our successes are Canada's successes. However well we're doing, though, we owe it to our readers, our authors, and our communities and ourselves to ask how much better we can be, how much better we should be. The right goal is for us to be world-beaters, to be the strongest publishers in our own country, and to carry Canada to the globe and to posterity through our books.

Over the last few years, we have moved past the claims that our business models are flawed, that our medium—the book—is outdated and disappearing, claims that have dogged us now for decades. Books endure because they are a unique medium: slow in development, thoughtful, intended to last, integrated, authoritative. Canadian publishers endure because we are the dedicated stewards of that medium in our odd and valuable corner of the world. We have proven ourselves resilient while adapting to changing times, without abandoning the core values of our medium, and we know that we can sustain those core values in the future. We have never been more necessary than we are now.

Glenn Rollans
President

The past year has been a full and productive one for ACP, and the reports in this book reflect a wide range of activity. Much was accomplished, and as always, much more remains to be done to advance the goals of the membership.

In Ottawa, ACP remains the voice of English-language Canadian book publishers, and the past year has seen activity on a number of fronts: the announcement of Canadian Heritage's Creative Canada Policy Framework and Creative Export Strategy; ongoing and often unpredictable NAFTA negotiations; consultation on reform of the Copyright Board; and the long-awaited start of the Parliamentary review of the *Copyright Act*. With the support of external advice from Global Public Affairs, and the strategic direction of ACP's engaged board of directors, these are active files, which ACP approaches through the lens of independent Canadian publishers.

A well-supported funding ecosystem for Canadian publishers remains a primary objective of ACP's advocacy work, and an increase to the Canada Book Fund (CBF) the association's top priority. Over the past year we have worked to advance the Standing Committee on Finance's December 2016 recommendation to Parliament that the CBF be increased. ACP presented to the committee as part of its pre-budget consultations for the first time in almost a decade, and we continue to nurture relationships with policy advisors to both the Minister of Finance and the Minister of Canadian Heritage. We have worked with our network of regional affiliates and francophone counterparts to emphasize the national impact an increase to the CBF would have, and continue to support members who meet with local MPs. Despite these efforts, Budget 2018 was a disappointment, and though the success and importance of the CBF is understood by policy makers and elected officials, its continued neglect only serves to challenge its future effectiveness. Our work to prepare for Budget 2019—the last budget the Liberal government will present before next fall's election—has already begun. Engagement with the Canada Council around the New Funding Model also continues, with recognition that the support of the Council forms a critical piece of the funding ecosystem.

On copyright, ACP continues to work with other rightsholder associations in both English and French Canada, to ensure we speak with one voice about the importance of a strong copyright framework and functioning marketplace. ACP was a founding partner in the "I Value Canadian Stories" campaign, which has provided a public face to the problematic amendments of 2012's *Copyright Modernization Act*, and we have also played a coordinating role among regional affiliates lobbying provincial governments. Activity around copyright has intensified in recent weeks as the Standing Committee on Industry, Science and Technology has started its examination of fair dealing through the Parliamentary review, and ACP will continue to play a leading role among rightsholder groups on this issue over the coming year.

The production of reliable research to make a compelling case for ACP's advocacy priorities has been a strategic goal of successive ACP boards. With the support of lead donor Kirk Howard, and contributions from retired ACP Executive Director Carolyn Wood and an anonymous donor, this year ACP was able to supplement funds drawn from the association's reserve to undertake the development of a sector profile of the Canadian-owned, English-language book publishing sector. This project will establish a baseline for the constituency ACP serves, and increase the credibility with which we speak to government, the media, and the wider industry about the cultural and economic contributions of Canadian-owned publishers. Canadian ownership remains central to ACP's mandate, and this work will help tell our story.

ACP remains a hub for industry-wide marketing activities, providing infrastructure that underpins a variety of initiatives and services. Traffic to 49th Shelf continues to grow, and in partnership with the OBPO the site expanded again this year to support the discovery of teacher resources linked to Canadian books and curriculum. This purpose was among those envisioned when 49th Shelf was first proposed, and it is exciting to see this goal realized. This September will mark ten years since ACP coordinated its initial symposium on collective digital action in the Canadian book industry, which eventually led to the creation of eBOUND. eBOUND continues to extend the reach of client publishers' digital content, by both opening new retail and wholesale channels and working strategically with existing distribution partners to build revenue.

Executive Director's Report

In January the membership reviewed ACP's existing strategic planning framework, adopted in 2014. In large part the framework remains aligned with members' objectives, though new priorities have emerged, and resolve around others has become heightened. With renewed focus from government on international markets, and the landmark FBM2020 initiative on the horizon, ACP's continued strategic involvement in export initiatives remains a priority. Here at home, the importance of promoting a diverse and inclusive publishing industry, not only in terms of the books that are published, but also with respect to the people behind them, is well-recognized. The membership provided direction on this front at the 2017 AGM by striking a committee to address this issue, and the dedicated group that has since formed will soon launch a baseline survey to measure diversity in the industry and inform new initiatives. Supporting the work of Indigenous publishers and writers is not explicit in the 2014 plan, and will be addressed in the refreshed framework. ACP will continue to build on its existing efforts in this area, which have come largely at the initiative of the PD Committee. And finally, though support for succession planning has long been a priority for ACP, the discussion in January brought renewed focus to this subject, particularly in consideration of those at the early and middle stages of their careers in publishing.

ACP reaps the benefits of having a dedicated membership, from which talented and generous board members are nominated each year. Terms of four members will end in June, and without exception I will miss working with all of them. My personal thanks go to Semareh Al-Hillal, who as ACP treasurer has provided thoughtful and thorough oversight of the organization's finances; to Lynn Fisher, whose strategic thinking has benefitted the Trade Committee and association as a whole; to Andrew Wooldridge, who has provided valuable leadership to the Children's Committee; and to Matt Williams, who after eight years of board service, including two years as president, has made contributions to ACP too numerous to name here.

Glenn Rollans has gone above and beyond as ACP president during the past year, and I thank him for the support, encouragement, and good counsel he provides me with regularly. Glenn's volunteer commitment to ACP and related organizations is significant, and his willingness to serve has been to the benefit of all members and our sector as a whole.

Our office remains a hive of activity with ACP, eBOUND, and Canada FBM2020 staff working together in tight quarters with good humour and collegiality. Thanks to retired and current eBOUND CEOs Krystyna Ross and Deborah Nelson, FBM2020 Executive Director Gillian Fizet, and both organizations' respective staff members for their continued partnership and collaboration.

The efforts of my ACP colleagues are reflected throughout this annual report: Geoff da Silva, our long-time Financial Officer; Emily Kellogg, who as Program Manager keeps ACP's many projects and committees on track; Inna Shepelska, who as Administrator managed a variety of responsibilities and resigned in February after more than six years with ACP; and Jazz Cook, who recently joined ACP as Administrative Assistant with energy and enthusiasm at one of the busiest times of year. Thanks to all for their dedication and service.

Finally, a note of thanks to ACP's membership, for the rich and important work you do as book publishers. It makes my own work at ACP all the more rewarding, and it remains a privilege to serve as executive director of your association.

Respectfully submitted,

Kate Edwards
Executive Director

The association is posting a small deficit for the 2017–2018 financial year, with revenue falling short of expenses by \$5,051, which is slightly better than the deficit of \$14,375 we had forecast for the year. Actual revenue and expenses were both lower than forecast, 6% each, resulting in the small deficit.

This year's deficit reduces our accumulated surplus to \$275,015, down from last year's level of \$280,066. With six to nine months of operational expenses considered to be the ideal, as noted in 2015's Report on ACP Accumulated Surplus, our current surplus puts us at the lower end of that guideline (approximately \$375,000 would be equivalent to nine months). No contribution from operating funds is required this year to maintain ACP's target accumulated surplus.

Our 2018–19 revenue budget is \$874,400, which is \$105,539 (11%) lower than the 2017–18 budget and \$50,477 (5%) lower than the 2017–18 actuals, essentially due to decreased project activity planned for the coming year. Our 2018–19 expenses budget is \$886,655, which is \$107,659 (11%) lower than the 2017–18 budget and \$43,274 (5%) lower than the 2017–18 actuals, again, attributable to projects. The result is a projected modest deficit of \$12,255 for 2018–19. In large part this forecast deficit can be attributed to the \$10,000 we have included in the budget for professional fees to support an intervention in the appeal of *Access Copyright v. York University*.

We begin the year in a positive position, with much of our grant revenue secure for the coming year. Three points of note:

- Operating grant: ACP applied for funding under the Canada Council's New Funding Model in July 2017. The existing annual grant of \$201,000 was reconfirmed for 2018–19, and will continue at that level in 2019–20. The 2018–19 budget reflects our confirmed grant for the year.
- Canadian Heritage projects: As is often the case, the project budget fluctuates from year to year and we have a lower budget forecast in 2018–19 than the previous year. This is mostly due to decreased project grant revenue from Canadian Heritage, with the redesign of 49th Shelf having taken place last year. A funding request made to CBF last year to support the Industry Profile project was also reflected in the 2017–18 budget. That application was ultimately unsuccessful, and corresponding project expenses were reduced accordingly.
- Fundraising/Legacy Fund: The \$10,000 recognized in 2017–18 came from three donors and has supported the Industry Profile project. We expect fundraising efforts to resume this fiscal, but we do not expect to recognize this revenue until we have project expenses to assign them against (i.e., the funds will be carried on the budget as deferred revenue to 2019–20).

My heartfelt thanks to Kate Edwards for the guidance, oversight and continuity she provides on financial matters, and to Glenn Rollans for his insights on all things treasury-related. Thanks also to Emily Kellogg and Jazz Cook for their ongoing work to keep our financial picture as up-to-date and healthy as it is, and to Geoff da Silva for his reliable and excellent work as our bookkeeper.

On behalf of the association I gratefully acknowledge and thank our funders at Canadian Heritage, the Canada Council, the Ontario Media Development Corporation and Livres Canada Books, whose support is vital to our ongoing activities.

Treasurer's Report

I hereby put forward the following motions:

1. I move acceptance of the Treasurer's Report for the ACP's 2018 AGM.
2. I move acceptance of the ACP's financial statements, audited by Bazar McBean LLP, for the year ended 31 March 2018.
3. I move acceptance of the ACP's 2018-19 budget as shown in this 2018 Annual Report Book.

Submitted by,

Semareh Al-Hillal
ACP Treasurer

**ASSOCIATION OF CANADIAN PUBLISHERS
FINANCIAL STATEMENTS
MARCH 31, 2018**

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INDEPENDENT AUDITORS' REPORT

To the Members of the Association of Canadian Publishers

We have audited the accompanying financial statements of the Association of Canadian Publishers, which comprise the statement of financial position as at March 31, 2018, and the statements of operations and net assets and cash flows for the year then ended, and a summary of significant accounting policies and other explanatory information.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with Canadian generally accepted auditing standards. Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditors consider internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence obtained is sufficient and appropriate to provide a basis for our audit opinion.

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INDEPENDENT AUDITORS' REPORT
(continued)

Opinion

In our opinion, the financial statements present fairly, in all material respects, the financial position of the Association of Canadian Publishers as at March 31, 2018, and the results of its operations and its cash flows for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

BAZAR MCBEAN LLP



Chartered Professional Accountants
Licensed Public Accountants

Oakville, Ontario
May 28, 2018

**ASSOCIATION OF CANADIAN PUBLISHERS
STATEMENT OF FINANCIAL POSITION**

MARCH 31,	2018	2017
ASSETS		
CURRENT		
Cash - note 2	\$ 100,342	\$ 39,299
Short-term investments - note 3	200,000	125,000
Accounts receivable - note 4	97,113	72,420
Prepaid expenses	19,099	34,280
Due from funding agencies - note 5	26,354	23,890
Due from eBound Canada - note 6	57,966	59,738
Due from Canada FBM 2020 - note 7	2,500	-
	503,374	354,627
LONG-TERM INVESTMENTS - note 3	34,707	34,707
FIXED ASSETS - note 8	2,284	4,959
	\$ 540,365	\$ 394,293
LIABILITIES		
CURRENT		
Accounts payable and accrued liabilities - note 9	\$ 162,289	\$ 64,812
Deferred revenue - note 10	103,061	49,415
	265,350	114,227
NET ASSETS	275,015	280,066
	\$ 540,365	\$ 394,293

Approved on behalf of the Board:

Director

Director

Subject to accompanying notes to the financial statements
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ASSOCIATION OF CANADIAN PUBLISHERS
STATEMENT OF OPERATIONS AND NET ASSETS

FOR THE YEAR ENDED MARCH 31,	2018	2017
REVENUE - OPERATIONAL		
Annual conference	\$ 24,996	\$ 13,980
eBound Canada administrative contribution - note 14	30,000	30,000
Grant - note 16	201,000	201,000
Interest income	1,173	993
Membership fees	257,670	267,041
Other income	33,915	22,330
	548,754	535,344
REVENUE - PROJECTS - note 15	376,123	343,097
	924,877	878,441
EXPENSES - OPERATIONAL		
Administrative - schedule	339,665	344,828
Annual conference	45,170	35,304
Committees	63,510	62,059
Government relations	42,000	42,000
	490,345	484,191
EXPENSES - PROJECTS - note 15	439,583	373,902
	929,928	858,093
(DEFICIT) EXCESS OF REVENUE OVER EXPENSES	(5,051)	20,348
NET ASSETS - beginning	280,066	259,718
NET ASSETS	\$ 275,015	\$ 280,066

Subject to accompanying notes to the financial statements

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**ASSOCIATION OF CANADIAN PUBLISHERS
SCHEDULE OF ADMINISTRATIVE EXPENSES**

FOR THE YEAR ENDED MARCH 31,	2018	2017
EXPENSES - ADMINISTRATIVE		
Amortization	\$ 2,674	\$ 3,149
Audit and legal	9,000	10,130
Bad debts	2,369	1,250
Bank charges	1,329	1,400
Bookkeeping	11,484	11,697
Delivery	222	188
Equipment leasing	4,052	5,020
Freelance communications	4,670	1,000
Insurance	2,748	2,748
Internet and website	2,437	6,054
Memberships	27,023	23,272
Mentorship costs	11,689	11,631
National Reading Campaign contribution	-	10,000
Office expenses	10,043	9,410
Office repairs and maintenance	1,800	1,780
Postage	230	213
Rental costs	68,265	60,118
Salaries and benefits	161,193	168,286
Telephone	4,769	5,104
Travel and entertainment	13,668	12,378
	\$ 339,665	\$ 344,828

Subject to accompanying notes to the financial statements

Page 5

ASSOCIATION OF CANADIAN PUBLISHERS
STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED MARCH 31,	2018	2017
CASH PROVIDED FROM (USED FOR)		
OPERATING ACTIVITIES		
(Deficit) excess of revenue over expenses	\$ (5,051)	\$ 20,348
Items not requiring a cash payment		
Amortization	2,674	3,149
	(2,377)	23,497
Changes in non-cash working capital balances		
Accounts receivable	(24,693)	(21,463)
Prepaid expenses	15,182	(19,536)
Due from funding agencies	(2,464)	9,307
Due from eBound Canada	1,772	83
Due from Canada FBM 2020	(2,500)	-
Accounts payable and accrued liabilities	97,477	(10,173)
Deferred revenue	53,646	(239,542)
	138,420	(281,324)
	136,043	(257,827)
INVESTING ACTIVITIES		
Purchase of fixed assets	-	(6,853)
Purchase of short-term investments - net	(75,000)	(25,000)
	(75,000)	(31,853)
NET INCREASE (DECREASE) IN CASH	61,043	(289,680)
CASH - beginning	39,299	328,979
CASH	\$ 100,342	\$ 39,299

Subject to accompanying notes to the financial statements

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**ASSOCIATION OF CANADIAN PUBLISHERS
NOTES TO THE FINANCIAL STATEMENTS**

MARCH 31, 2018

PURPOSE OF THE ORGANIZATION

The Association of Canadian Publishers (the "Association") was organized in 1971 to work for the development and maintenance of competitive publishing houses owned and controlled in Canada. The Association also represents Canadian-owned publishers' interest with public and private institutions in Canada and abroad. For Canadian income tax purposes, the Association qualifies as a not-for-profit organization which is exempt from income taxes under Section 149 (1) of the Income Tax Act.

1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

a) Basis of accounting

These financial statements have been prepared in accordance with Canadian accounting standards for not-for-profit organizations, which is in accordance with Canadian generally accepted accounting principles.

b) Financial instruments

The Association initially measures its financial assets and financial liabilities at fair value except for certain non-arm's length transactions. The Association subsequently measures all its financial assets and financial liabilities at amortized cost.

Financial assets measured at amortized cost include cash, short-term investments, accounts receivable, due from funding agencies and long-term investments.

Financial liabilities measured at amortized cost include accounts payable and accrued liabilities.

The Association recognizes transaction costs in net income in the period incurred except for financial instruments that will not be measured subsequently at fair value. The carrying amount of these instruments are adjusted by the transaction costs that are directly attributable to the instrument.

c) Use of estimates

The preparation of the Association's financial statements in conformity with Canadian accounting standards for not-for-profit organizations requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosures of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenue and expenses during the reporting period.

**ASSOCIATION OF CANADIAN PUBLISHERS
NOTES TO THE FINANCIAL STATEMENTS**

MARCH 31, 2018

1. SIGNIFICANT ACCOUNTING POLICIES - continued

c) Use of estimates - continued

These estimates are reviewed periodically, and as adjustments become necessary, they are reported in operations in the period in which they become known. Actual results in the future may differ from those estimates made.

d) Cash

The Association's policy is to disclose bank balances under cash.

e) Fixed assets

Fixed assets are recorded at cost. Amortization is provided on a straight line basis over the estimated useful lives of the assets which is 3 years for furniture and fixtures and telephone equipment.

f) Revenue recognition

The Association follows the deferral method of accounting.

Project revenues consist of grants and publishers' contributions. Grant revenue is recognized upon receipt based on the individual grant agreements. Grant revenue is recorded to cover the expenses incurred on various programs. Where grants have been advanced in excess of amounts expended under a program, the excess is recorded as deferred revenue. Conversely, where expenses exceed advances on a grant, the difference, to the extent recoverable, is shown as an amount due from the grantor. Publishers' contributions to project revenues are recognized when the publishers are billed for each specific service provided in relation to the specific project.

Membership fee revenue is recognized upon receipt of current year fee or when an initial installment is made on the total membership fee. The total amount is recognized in revenue and the balance outstanding is treated as a receivable.

Annual conference and other income are recognized when received. Interest income and eBound Canada administrative contributions are recognized when earned.

ASSOCIATION OF CANADIAN PUBLISHERS
NOTES TO THE FINANCIAL STATEMENTS

MARCH 31, 2018

1. SIGNIFICANT ACCOUNTING POLICIES - continued

g) Contributed services and materials

The Board of Directors and others contribute volunteer services to the Association in carrying out its operating activities. Because of the difficulty in determining the fair value of these contributed services, they are not recognized in the financial statements. Contributed materials are recorded, when received, at their fair value.

h) Expense allocation

Salaries and benefits and bookkeeping costs are allocated from administrative expenses to specific projects. The allocation is based on an assessment made by the Program Manager which takes into account the estimated hours staff spend on each project and the amount of contribution received for that project for salaries and benefits. This allocation varies from project to project and from year to year.

2. CASH

The Association has a \$25,000 revolving operating line of credit available for its use from the Royal Bank of Canada at an interest rate based on the Royal Bank's prime rate plus 2.25%. The line of credit is secured by a general security agreement covering all assets of the Association. The Association also has two credit cards available for use totaling \$22,500. The line of credit and credit cards are also secured by a security agreement covering a GIC in the amount of \$15,000. As at March 31, 2018 the balance outstanding in the line of credit was nil (March 31, 2017 - nil).

3. INVESTMENTS

	Interest Rate	Maturity Date	2018	2017
SHORT-TERM				
Royal Bank of Canada GIC	0.50%	June 29, 2018	\$ 200,000	\$ -
Royal Bank of Canada GIC			-	100,000
Royal Bank of Canada GIC			-	25,000
			\$ 200,000	\$ 125,000

ASSOCIATION OF CANADIAN PUBLISHERS
NOTES TO THE FINANCIAL STATEMENTS

MARCH 31, 2018

3. INVESTMENTS - continued

	Interest Rate	Maturity Date	2018	2017
LONG-TERM				
Royal Bank of Canada GIC	1.00%	December 22, 2021	\$ 34,707	\$ 34,707

4. ACCOUNTS RECEIVABLE

	2018	2017
Accounts receivable	\$ 82,783	\$ 63,909
Sales taxes recoverable	14,330	8,511
	\$ 97,113	\$ 72,420

5. DUE FROM FUNDING AGENCIES

	2018	2017
Department of Canadian Heritage	\$ 6,711	\$ 2,488
Livres Canada Books	1,243	2,652
Ontario Media Development Corporation	18,400	18,750
	\$ 26,354	\$ 23,890

6. DUE FROM eBOUND CANADA

The amount due from eBound Canada (a related not-for-profit organization of which ACP is the sole member) is unsecured, non-interest bearing and has no fixed terms of repayment.

**ASSOCIATION OF CANADIAN PUBLISHERS
NOTES TO THE FINANCIAL STATEMENTS**

MARCH 31, 2018

7. DUE FROM CANADA FBM 2020

The amount due from Canada FBM 2020 (a related not-for-profit organization of which ACP is a member) is unsecured, non-interest bearing and is due at the conclusion of the Canada Guest of Honour Project in 2020.

8. FIXED ASSETS

	Cost	Accumulated Amortization	2018	2017
Furniture and fixtures	\$ 19,586	\$ 17,302	\$ 2,284	\$ 4,959
Telephone equipment	1,300	1,300	-	-
	\$ 20,886	\$ 18,602	\$ 2,284	\$ 4,959

9. ACCOUNTS PAYABLE AND ACCRUED LIABILITIES

	2018	2017
Trade payable and accrued liabilities	\$ 158,395	\$ 60,367
Withholding taxes payable	3,894	4,445
	\$ 162,289	\$ 64,812

10. DEFERRED REVENUE

	2018	2017
AGM sponsorships	\$ 5,000	\$ 5,000
Grants	7,000	6,025
Membership fees	90,746	33,390
Other - research project	-	5,000
Other - supporter contributions	315	-
	\$ 103,061	\$ 49,415

ASSOCIATION OF CANADIAN PUBLISHERS
NOTES TO THE FINANCIAL STATEMENTS

MARCH 31, 2018

11. ALLOCATION OF EXPENSES

The total amount of salaries and benefits and bookkeeping costs allocated from administrative expenses to project expenses in 2018 is \$25,563 (2017 - \$27,832).

12. COMMITMENTS

The Association entered into contracts for a photocopier and its premises. These contracts have 30 day and 90 day cancellation clauses and expire on December 31, 2020 and May 31, 2022 respectively.

Future minimum annual payments are as follows:

2019	\$ 80,717
2020	80,717
2021	79,343
2022	75,223
2023	12,537
	\$ 328,537

The Association entered into several contracts for consulting services. These contracts are project based and future minimum payments are determined as services are provided.

The Association also entered into a contract for government relations support. This contract is subject to a monthly fee of \$3,500 plus taxes and has a 30 day cancellation clause.

In addition, the Association entered into a number of contracts for services which include bookkeeping, telephone, internet and cleaning. These contracts are all on a month-to-month basis.

13. FINANCIAL INSTRUMENTS

The significant financial risks to which the Association is exposed to are credit risk and liquidity risk.

**ASSOCIATION OF CANADIAN PUBLISHERS
NOTES TO THE FINANCIAL STATEMENTS**

MARCH 31, 2018

13. FINANCIAL INSTRUMENTS - continued

a) Credit risk

Credit risk refers to the risk that parties may default on their financial obligations, or if there is a concentration of transactions carried out with the same party or if there is a concentration of financial obligations which have similar economic characteristics such that they could be similarly affected by changes in economic conditions.

The Association is exposed to credit risk on its accounts receivables in the amount of \$97,113 (2017 - \$72,420). The Association does not obtain collateral or other security to support the accounts receivable subject to credit risk but mitigates this risk by dealing only with what the Board believes to be financially sound counter-parties and, accordingly, does not anticipate significant loss for non-performance.

b) Liquidity risk

Liquidity risk is the risk that the Association will not be able to meet a demand for cash or fund its future obligations as they come due. Liquidity risk also includes the risk of the Association not being able to liquidate assets in a timely manner at a reasonable price.

The Association is exposed to liquidity risk on its accounts payable in the amount of \$162,289 (2017 - \$64,812). The Association meets its liquidity requirements by preparing and monitoring detailed forecasts of cash flows from operations and holding assets that can be readily converted into cash. The Association also has a line of credit available that has not been drawn upon should it be required to meet temporary fluctuations in cash requirements.

There have been no changes in the above noted risks from the prior year.

14. RELATED PARTY TRANSACTIONS

During the year a \$10,000 (2017 - \$10,000) honorarium was paid to the publishing firm of the President of the Association. In addition, the Association charged administrative fees to eBound Canada for office space and shared equipment in the amount of \$30,000 (2017 - \$30,000). These transactions are recorded in the statement of operations and net assets and are in the normal course of operations and are measured at the exchange amount, which is the amount of consideration established and agreed to by related parties. The fee charged to eBound Canada for shared services is below fair market value.

ASSOCIATION OF CANADIAN PUBLISHERS
NOTES TO THE FINANCIAL STATEMENTS

MARCH 31, 2018

15. PROJECT REVENUE AND EXPENSES

REVENUE - note 16	2018	2017
49th Shelf	\$ 238,158	\$ 154,701
Booknet Buying Group	23,149	19,708
Diverse books initiative	-	945
Export Projects	14,990	10,950
Higher education international conference	1,570	5,050
International book fair	6,861	10,067
LMS research	-	45,884
OLA networking lunch	-	4,000
PD sessions	41,822	39,898
PD subsidy program	22,903	23,264
Top Grade marketing	26,670	28,630
	\$ 376,123	\$ 343,097

EXPENSES	2018	2017
49th Shelf	\$ 241,617	\$ 178,180
Booknet Buying Group	19,796	16,676
Diverse books initiative	-	1,144
Export Projects	15,453	10,658
Higher education international conferences	3,297	12,205
Indie bookseller research	1,690	-
Industry profile	39,455	-
International book fairs	7,546	13,345
LMS research	-	47,331
OLA networking lunch	-	3,893
PD sessions	59,112	44,269
PD subsidy program	25,082	19,564
Top Grade marketing	26,535	26,637
	\$ 439,583	\$ 373,902

ASSOCIATION OF CANADIAN PUBLISHERS
NOTES TO THE FINANCIAL STATEMENTS

MARCH 31, 2018

16. GRANTS

During the year, the Association was approved for multi-year operating support from the Canada Council for the Arts. The total grant amount approved was \$603,000. The first installment of \$201,000 was received in the current year and recognized in the statement of operations and net assets.

In addition, the Association receives grants from various funding agencies (Ontario Media Development Corporation, Department of Canadian Heritage, the Canada Council for the Arts and Livres Canada Books) for various projects. These funding agencies require the Association to submit reports as stipulated in the agreement for ongoing support. Any unspent or misused funds must be repaid to the funding agencies.

**BUDGET SUMMARY
2018-19**

	BUDGET 2017-18	ACTUALS 2017-18	BUDGET 2018-19
REVENUE			
ACP Membership	269,000	257,670	269,000
Operating Grant	201,000	201,000	201,000
Project Grants	304,539	249,721	206,575
Earned Project Revenue	122,650	126,402	123,375
Miscellaneous Revenue	82,750	90,084	74,450
TOTAL REVENUE	979,939	924,877	874,400
EXPENSES			
Board & Committees	141,350	136,920	152,000
Ottawa Advisor	42,000	42,000	42,000
Marketing Projects	304,030	292,935	241,000
Professional Development	75,680	84,194	75,455
Research Projects	76,880	39,455	6,000
Export Projects	20,000	22,999	26,000
Administrative	334,374	311,425	344,200
Grant reimbursements	-	-	-
TOTAL EXPENSES	994,314	929,928	886,655
NET SURPLUS/DEFICIT	(14,375)	(5,051)	(12,255)
ACCUMULATED NET ASSETS*	265,691	275,015	262,760

* In June 2015, the ACP membership endorsed a recommendation to maintain an accumulated surplus of 40% of the association's annual operating expenses. With an operating budget of approximately \$500,000, ACP aims to maintain an accumulated surplus of at least \$200,000.

REVENUE

	BUDGET 2017-18	ACTUALS 2017-18	BUDGET 2018-19	
Membership				
Full Members	265,000	253,076	265,000	
Associate Members	4,000	4,594	4,000	
Special Levy	-	-	-	
Total Membership	269,000	257,670	269,000	
Grants				
Canada Council Operating	201,000	201,000	201,000	
DCH Projects	222,039	176,460	126,325	Note 1
OMDC Projects	78,500	66,400	70,250	
LCB Projects	4,000	6,861	10,000	
Total Grants	505,539	450,721	407,575	
Other Revenue				
Earned Project Revenues	122,650	126,402	123,375	
Miscellaneous Revenue				
Member Travel Levy	9,000	10,650	10,000	
Sponsorships and supporters	10,000	16,750	15,000	
Fundraising: Research Program	10,000	10,000	-	Note 2
AGM Revenue	7,500	8,246	5,000	
Mentorship	4,500	2,500	4,500	
LPG Contribution to Ott Advisor	5,000	5,000	5,000	
Interest	750	1,173	750	
Sundry Revenue	-	815	-	
eBound Admin Contribution	30,000	30,000	30,000	
FBM2020 Admin Contribution	6,000	4,950	4,200	
Total Miscellaneous Revenue	82,750	90,084	74,450	
Total Other Revenue	205,400	216,486	197,825	
Total Revenue	979,939	924,877	874,400	

¹ Lower than forecast 2017-18 actuals due to result of unsuccessful CBF grant application.

(See Industry Profile project details.)

² Fundraising efforts will continue in 2018-19, with revenue recognized when expenses are incurred in future fiscal years.

BOARD AND COMMITTEE EXPENSES

	BUDGET 2017-18	ACTUALS 2017-18	BUDGET 2018-19
Board	8,500	7,043	8,500
President's Honorarium	10,000	10,000	10,000
President's Expenses	1,250	1,175	1,250
Government Relations	30,000	30,385	30,000
Affiliates	100	31	100
Children's Committee	100	0	100
Copyright Committee	0	0	0
Diversity & Inclusion Committee	0	88	1,000
Education Committee	100	10	100
Export Committee	100	73	100
Higher Education Committee	100	42	100
Library Committee	100	0	0
Nominating Committee	100	73	100
PD Committee	100	93	100
Special Events Committee	100	19	100
Trade Committee	100	123	100
49th Shelf Advisory Group	500	74	250
Memberships in Other Organizations	19,600	18,391	19,600
Midwinter Membership Meeting	3,000	1,631	3,000
AGM	45,000	45,170	50,000
Member Travel Subsidy	22,500	22,500	27,500
Total	141,350	136,920	152,000

Memberships Detail, 2018-19 Budget

Book & Periodical Council	2,500
BookNet Canada	2,400
Canadian Arts Coalition	500
Canadian Copyright Institute	2,100
Coalition for Cultural Diversity	2,200
Cultural Human Resources Council	400
International Publishers Association	9,500
Total	19,600

ADMINISTRATION EXPENSES

	BUDGET 2017-18	ACTUALS 2017-18	BUDGET 2018-19
Executive Director's Expenses	6,000	4,054	6,000
Bad Debts	1,500	2,369	1,500
Amortization	3,000	2,674	3,000
Office Supplies	8,000	8,305	8,000
Office Administration	0	0	0
Bank Charges	1,500	1,329	1,500
Repairs & Maintenance	2,000	1,800	2,000
Insurance	3,000	2,748	3,000
Professional Fees	14,000	9,000	24,000 Note 3
Bookkeeping Expense	11,959	11,484	12,034 Note 4
Wages and Benefits	165,415	161,193	170,666 Note 5
Communications: Freelancers	5,000	4,670	5,000
Staff PD & Conferences	1,500	1,397	1,500
Postage and Shipping	250	230	250
Courier and Delivery	250	222	250
Rent	66,000	68,265	70,000
Parking	0	0	0
Equipment Leases	5,000	4,052	5,000
Telephone & Internet Service	4,500	4,769	5,000
Website and IT support	3,000	2,437	3,000
Miscellaneous	500	1,738	500
Loss on Disposal of Assets	0	0	0
Mentorships	20,000	11,689	15,000
Sponsorships	12,000	7,000	7,000
Total	334,374	311,425	344,200

³ 2018-19 budget includes contribution to intervention in York appeal.

⁴ An additional \$2,366 is allocated to 2018-19 project expenses.

⁵ An additional \$21,591 is allocated to 2018-19 project expenses.

PROJECTS SUMMARY: REVENUE

Projects Cash Revenue	BUDGET 2017-18	ACTUALS 2017-18	BUDGET 2018-19
Marketing			
BookNet Sales Data Buying Group	7,500	9,048	8,925
BookNet CataList Buying Group	12,500	14,101	15,000
Higher Education Conferences	4,000	1,570	4,000
49th Shelf	164,800	132,229	166,250
49th Shelf Interface Redesign	73,000	72,975	0
49th Shelf: Books in Schools	0	32,954	11,500
Top Grade	30,000	26,670	29,500
OLA Networking Event	4,000	0	5,000
Indie Bookseller Outreach	0	0	0
Total Marketing	295,800	289,547	240,175
Professional Development			
PD Seminars Project	41,210	41,822	42,368
External PD	29,679	22,903	25,808
Total Professional Development	70,889	64,725	68,175
Research			
Industry Profile	40,000	0	0
Digital Resource Best Practice Initiative	0	0	0
Total Research	40,000	0	0
Export			
International Book Fairs	2,500	3,397	6,500 Note 6
Bologna Book Fair Dinner	8,250	8,080	4,600 Note 7
Frankfurt Book Fair Dinner	6,750	6,910	7,000
eBound Export Project	1,500	3,463	3,500
Total Export	19,000	21,851	21,600
Total Projects Revenue	425,689	376,123	329,950

⁶ Increased FRMAP funding anticipated in 2018-19 to support travel to three international book fairs versus one in 2017-18.

⁷ Actuals for 2017-18 includes support for two Bologna events (April 2017 & March 2018)

PROJECTS SUMMARY: EXPENSES

Projects Cash Expenses	BUDGET 2017-18	ACTUALS 2017-18	BUDGET 2018-19
Marketing			
BookNet Sales Data Buying Group	7,150	8,616	8,500
BookNet CataList Buying Group	10,000	11,180	12,000
Higher Education Conferences	7,000	3,297	7,000
49th Shelf	168,380	136,719	166,250
49th Shelf Interface Redesign	73,000	73,444	-
49th Shelf: Books in Schools	-	31,454	11,500
Top Grade	30,000	26,535	28,250
OLA Networking Event	4,000	-	5,000
Indie Bookseller Outreach	3,000	1,690	2,500
Total Marketing	302,530	292,935	241,000
Professional Development			
PD Seminars Project	48,770	59,112	48,545
External PD	26,910	25,082	26,910
Total Professional Development	75,680	84,194	75,455
Research			
Industry Profile	76,880	39,455	5,000
Digital Resource Best Practice Initiative	-	-	1,000
Total Research	76,880	39,455	6,000
Export			
International Book Fairs	4,000	4,083	12,000
Bologna Book Fair Dinner	8,000	8,270	4,000
Frankfurt Book Fair Dinner	6,500	7,183	6,500
eBound Export Project	1,500	3,463	3,500
Total Export	20,000	22,999	26,000
Total Projects Expenses	475,090	439,583	348,455
Net Contribution from projects	(49,401)	(63,460)	(18,505)

OTTAWA ADVISOR

	BUDGET 2017-18	ACTUALS 2017-18	BUDGET 2018-19
Consulting services	42,000	42,000	42,000
Expenses	0	0	0
Total	42,000	42,000	42,000

Budget 2018-19**PROJECT REVENUE BY SOURCE
2018-19**

	DCH	OMDC	LCB	Total from Grants	Earned	Total
Marketing Projects						
BookNet Sales Data					8,925	8,925
BookNet Catalist					15,000	15,000
Higher Ed conferences					4,000	4,000
49th Shelf	73,000	30,250		103,250	63,000	166,250
49th Shelf: Books in Schools					11,500	11,500
Top Grade		25,000		25,000	4,500	29,500
OLA Networking Event		5,000		5,000	0	5,000
Indie Bookseller Outreach						0
Total Marketing Projects	73,000	60,250	0	133,250	106,925	240,175
Professional Development						
PD Seminars	27,518			27,518	14,850	42,368
External PD	25,808			25,808		25,808
Total PD Projects	53,325	0	0	53,325	14,850	68,175
Research						
Industry Profile				0	0	0
Digital Best Practice Initiative				0	0	0
Total Research Projects	0	0	0	0	0	0
Export						
International Book Fairs			6,500	6,500		6,500
Bologna Dinner		4,000		4,000	600	4,600
Frankfurt Dinner		6,000		6,000	1,000	7,000
eBound Export Marketing			3,500	3,500		3,500
Total Export		10,000	10,000	20,000	1,600	21,600
Total	126,325	70,250	10,000	206,575	123,375	329,950

For those of you I have not met yet, my name is Deborah Nelson and I have been the CEO of eBOUND since November 2017, following the retirement of Kryss Ross. I am very excited to be able to continue my 20 year publishing career with eBOUND and feel honoured to be working with such talented and committed staff and publisher clients. eBOUND's projected growth trajectory is impressive. Please see below for an overview of eBOUND's financial picture and project focus.

Financial Overview

eBOUND had a positive 2017–18 fiscal year with retail sales up 16% over budget and 6% over the previous year. Academic library sales are up 34% over budget and 35% over the previous year. Expenses are tracking very close to budget. As such eBOUND anticipates finishing the fiscal year with a deficit of \$12,832. eBOUND is forecasting a strong 2018–19 Financial Year due to the following:

- Annual retail sales are forecasted to break the million-dollar mark for the first time in our history.
- Academic library sales are forecasted to generate \$700,000 due to the NNELS partnership.
- Confirmed government funding to date for 2018–19 fiscal exceeds the previous fiscal year.

Details are as follows:

Sales Activity :

eBOUND increased retail sales revenue by 6% over the previous year. We have forecasted 20% growth over previous year in 2018–19 because of our focus on enhancing metadata and strategically growing our list of vendors.

Retail Revenue		
2016–17	2017–18	2018–19 (Forecast)
\$791,018 20% increase over previous year	\$841,510 6% increase over previous year	\$1,040,111 Projected increase over previous year of 20%
Academic Revenue		
\$419,020	\$652,267	\$700,000

Grants

Funding Source	2017–18	2018–19	Grant Focus
DCH	\$276,000	\$276,000 Confirmed	Project Funding
OMDC	\$15,000	\$39,761 Confirmed \$27,500 Pending	Library Gap Analysis Part 2 Enhanced Metadata Revenue Impact
CCA	\$14,500	\$15,450 Pending	Arts Abroad (exploring export markets)
LCB	\$2,900	\$4,500	FRMAP
TOTAL	\$308,400	\$315,000 Confirmed \$373,211 If all grants approved*	

** Please note that additional grants that support eBOUND's strategic growth plans will be applied for during the course of the 2018–19 fiscal year.*

Operations

Significant progress has been made on the Remittance Processing System. The bridges mapping the retailer reports into a single, consistent format have been built and successfully implemented. Research is being conducted throughout the summer to determine if an enhanced dashboard would be a service that publisher clients would pay for, including real-time sales for both digital and print by territory and by publisher.

For those publishers that wish, eBOUND will fully move to online remittance by 1 July 2018.

eBOUND has hired and on-boarded a new Digital Services Specialist and Sales and Marketing Specialist and has been fully staffed since the beginning of March.

In the 2017–2018 fiscal year eBOUND signed distribution agreements with the following retailers:

- VitalSource
- Gardners Books
- Mackin Educational
- Findaway
- Kobo Audio
- Perlego

Project Highlights

Export Market Focus

As an element of our growth strategy, eBOUND is focusing on growing retail sales in export markets. To promote these efforts eBOUND has applied to Canada Council for funding to attend the following Book Fairs:

- BEA, May 2018
- Frankfurt Book Fair, October 2018
- London Book Fair, March 2019
- Bologna Book Fair, March 2019

The focus of this strategy is to get more thorough digital sales distribution into target markets. For example, the German market purchases approximately 50% of its digital content from smaller online German shops. As such eBOUND is partnering with leading German distributors who have relationships with these local online shops and understand effective marketing strategies as a way to access this portion of the market. The goal of attending these book fairs is to duplicate this strategy in other key markets.

Library Gap Analysis Part 2

eBOUND received \$39,700 of funding from OMDC's Business Intelligence Program to continue our Library Gap Analysis research with 23 Ontario library systems. The purpose of this research will be to identify factors impacting the acquisition of Canadian digital content within Ontario libraries, gather circulation data by genre to help inform the publishers marketing strategies and to get an overview of the variety of licensing models currently used.

eBOUND hosted a German Trade Mission on March 22 that brought 4 leading German digital distributors together with 22 Canadian publishers to discuss how more Canadian content can be sold into the German market. Conversations regarding merchandizing strategies are part of our contract negotiations with these four potential vendors: HGI, Readbox, Bookwire and PaperC.

Ebookcraft took place on March 21 and 22, drawing 85 participants to this event (the same attendance level as last year). Feedback was consistently positive from all stakeholders. eBOUND and BookNet are having conversations about ways to shift the agenda going forward in order to continue to respond to our audience and drive attendance as a way of reducing the cost of this event for both organizations.

Enhanced Metadata Research

eBOUND has requested funding from OMDC to determine the sales impact of enhanced key words on Canadian content on Amazon. Partnering with Firebrand Technologies, this research will involve adding audience-generated keywords to the metadata for 250 fiction and non-fiction titles published by Ontario presses, and then submitting that metadata to online retailers like Amazon to determine their effect on ebook sales. eBOUND will monitor the number of sales of titles in the pilot group for a period of one month, and compare those sales numbers for the same titles in the month and year prior to adding the keywords to their metadata.

Strategic Distribution

In an effort to expand our list of global ebook and audiobook vendors, eBOUND is currently pursuing the following companies to discuss possible distribution agreements:

Audiobook Distributors:

- Playster
- Downpour

eBook Distributors:

- BookWire
- ReadBox
- BookTopia

Respectfully submitted by
Deborah Nelson
May 2018

Acorn Press	Charlottetown, PE	Engage Books	Surrey, BC	Playwrights Canada Press	Toronto, ON
Annick Press	Toronto, ON	Fernwood Publishing	Winnipeg, MB; Flanker, NS	Pontifical Institute of Mediaeval Studies	Toronto, ON
Anvil Press	Vancouver, BC	Flanker Press	St. John's, NL	Porcupine's Quill	Erin, ON
Arsenal Pulp Press	Vancouver, BC	Formac Publishing Company	Halifax, NS	Portage & Main Press	Winnipeg, MB
ARP Books	Winnipeg, MB	Freehand Books	Calgary, AB	Ronsdale Press	Vancouver, BC
Athabasca University Press	Edmonton, AB	Goose Lane Editions	Fredericton, NB	Royal British Columbia Museum	Victoria, BC
Banff Centre Press	Banff, AB	Great Plains Publications	Winnipeg, MB	Royal Ontario Museum Press	Toronto, ON
Bedside Press	Winnipeg, MB	Greystone Books	Vancouver, BC	Running the Goat Books & BroadSides	Tors Cove, NL
Beech Street Books	Collingwood, ON	Guernica Editions	Oakville, ON	Sara Jordan Publishing	St. Catherines, ON
Book*hug	Toronto, ON	Hancock House	Surrey, BC	Second Story Press	Toronto, ON
Books We Love	Airdrie, AB	House of Anansi Press & Groundwood Books	Toronto, ON	Signature Editions	Winnipeg, MB
Boulder Publications	Portugal Cover-St. Philip's, NL	Inanna Publications	Toronto, ON	Talon Books Ltd.	Vancouver, BC
Breakwater Books Ltd.	St. John's, NL	Inhabit Media	Iqaluit, NU / Toronto, ON	The Heritage Group	Surrey, BC
Brick Books	London, ON	Invisible Publishing	Picton, ON	The Key Publishing House Inc.	Toronto, ON
Broadview Press	Peterborough, ON; Guelph, ON; Calgary, AB; Nanaimo, BC; Wolfville, NS	Irwin Law Inc.	Toronto, ON	Theytus Books Ltd.	Penticton, BC
Brush Education Inc.	Edmonton, AB	ISER Books	St. John's, NL	Thistledown Press Ltd.	Saskatoon, SK
Bunim & Bannigan Books	Charlottetown, PEI	J. Gordon Shillingford Publishing	Winnipeg, MB	Thompson Educational Publishing Inc.	Toronto, ON
Caitlin Press Inc.	Halfmoon Bay, BC	Les Éditions CEC Inc.	Anjou, QC	Tradewind Books Ltd.	Vancouver, BC
Canadian Institute for Studies in Publishing, Simon Fraser University	Vancouver, BC	Linda Leith Publishing Inc.	Westmount, QC	Tralco Educational Services	Hamilton, ON
Canadian Power and Sail Squadron	Toronto, ON	MacIntyre Purcell Publishing Inc.	Lunenburg, NS	Turnstone Press	Winnipeg, MB
Canadian Museum of History	Gatineau, QC	Mansfield Press	Toronto, ON	Ulysses Travel Guides	Montreal, QC
Canadian Scholars' Press Inc.	Toronto, ON	McGill-Queen's University Press	Montreal, QC	United Church Publishing House	Toronto, ON
Centre for Addiction and Mental Health	Toronto, ON	McKellar & Martin Publishing Group Ltd.	New Westminster, BC	University of Alberta Press	Edmonton, AB
Coach House Books	Toronto, ON	Mother Tongue Publishing	Salt Spring Island, BC	University of British Columbia Press	Vancouver, BC
Coteau Books	Regina, SK	Municipal World	Union, ON	University of Calgary Press	Calgary, AB
Crow Cottage Publishing	Victoria, BC	NeWest Press	Edmonton, AB	University of Manitoba Press	Winnipeg, MB
Demeter Press	Bradford, ON	Nimbus Publishing	Halifax, NS	University of Ottawa Press	Ottawa, ON
Douglas & McIntyre	Madeira Park, BC	Nunavut Arctic College Media	Iqaluit, NU	University of Toronto Press	Toronto, ON
Dundurn Press	Toronto, ON	Now or Never Publishing	Vancouver, BC	University of Regina Press	Regina, SK
Dunlop Art Gallery	Regina, SK	Orca Book Publishers Ltd.	Victoria, BC	Véhicule Press	Montreal, QC
Durville Publications	Calgary, AB	Owlkids Books	Toronto, ON	Wilfrid Laurier University Press	Waterloo, ON
ECW Press	Toronto, ON	Pajama Press Inc.	Toronto, ON	Woodlake Publishing	Kelowna, BC
		Palimpsest Press	Windsor, ON		

ACP Board

President	Glenn Rollans, Brush Education
Vice-President	Melissa Pitts, UBC Press
Treasurer	Semareh Al-Hillal, Kids Can Press
Secretary	Sean Guistini, Nunavut Arctic College Media
Past President	Matt Williams, House of Anansi Press / Groundwood Books
Members-at-Large	Wayne Antony, Fernwood Publishing
	Karen Boersma, Owlkids Books
	Terrilee Bulger, Nimbus Publishing / Acorn Press
	Lynn Fisher, University of Toronto Press
	Leigh Nash, Invisible Publishing
	Andrew Wooldridge, Orca Book Publishers
	Greg Younging, Theytus Books

ACP Staff

Executive Director	Kate Edwards
Program Manager	Emily Kellogg
Administrative Assistant	Jazz Cook

eBOUND Staff

Chief Executive Officer	Deborah Nelson
Manager of Technology	Shannon Culver
Sales and Marketing Specialist	Cassandra Dolan
Digital Services Specialist	Sabrina Taylor

ACP Alumni

Administrator (February 2018)	Inna Shepelska
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eBOUND Alumni

Chief Executive Officer (November 2017)	Krystyna Ross
Marketing and Communications Coordinator (January 2018)	Elizabeth Barker
Digital Services Coordinator (February 2018)	Caroline Pisano

Thank you to the many volunteers
who contributed to the ACP successes in 2017-18.

Semareh Al-Hillal	Curran Faris	Leigh Nash
Susanne Alexander	Lynn Fisher	Brendan Ouellette
Jessica Antony	Donna Francis	Lauren Perruzza
Wayne Antony	Jennifer Gauthier	Melissa Pitts
Kelsey Attard	Catherine Gerbasi	Amelie Roberge
Elizabeth Barker	Annie Gibson	Emma Rodgers
Jillian Bell	Sean Guistini	Glenn Rollans
Karen Boersma	Bill Harnum	Rebecca Rose
Matt Bowes	Kirk Howard	Rob Sanders
Judy Brunsek	Barbara Howson	Lorene Shyba
Margaret Bryant	Steve Izma	Adrienne Tang
Terrilee Bulger	Holly Kent	Christen Thomas
Hamish Cameron	Renée Knapp	Alex Trnka
Linda Cameron	Kieran Leblanc	Synora Van Drine
David Caron	Linda Leith	Heidi Waechter
Caryn Cathcart	Anna Leventhal	Bruce Walsh
Philip Cercone	Jessica Lewis	Wendy Whitebear
Michaela Cornell	Ruth Linka	Rick Wilks
Cathie Crooks	Tonya Martin	Matt Williams
Amanda Crocker	Karen May Clark	Margie Wolfe
Shannon Culver	Susan McIntosh	Andrew Wooldridge
Simon Dardick	Hazel Millar	Greg Younging
Bob Dees	Jeff Miller	
Leslie Dema	Catherine Mitchell	

We remember the many volunteer contributions of Sheila Barry (d. November 2017).

We have tried to create an accurate and complete list.
Please notify us if we have inadvertently missed your name.

Fee categories are based on worldwide net sales of book titles and rights licenses for books that have a company's own ISBNs (and not including sales of other ACP members). Net sales are defined as gross sales net of trade discounts and returns.

Net Sales Category	2018 Rate	GST (5%)	Total Fee
Associate			
	\$367.50	\$18.38	\$385.88
Full			
0-49,999	\$498.75	\$24.94	\$523.69
50,000-99,999	\$840.00	\$42.00	\$882.00
100,000-199,999	\$1,312.50	\$65.63	\$1,378.13
200,000-299,999	\$1,837.50	\$91.88	\$1,929.38
300,000-399,999	\$2,572.50	\$128.63	\$2,701.13
400,000-499,000	\$2,992.50	\$149.63	\$3,142.13
500,000-599,999	\$3,780.00	\$189.00	\$3,969.00
600,000-699,999	\$4,305.00	\$215.25	\$4,520.25
700,000-799,999	\$4,935.00	\$246.75	\$5,181.75
800,000-999,999	\$6,142.50	\$307.13	\$6,449.63
1,000,000-1,999,999	\$6,930.00	\$346.50	\$7,276.50
2,000,000-2,999,999	\$7,665.00	\$383.25	\$8,048.25
3,000,000-4,999,999	\$8,925.00	\$446.25	\$9,371.25
5,000,000+	\$9,712.50	\$485.63	\$10,198.13

For members located in Ontario, substitute GST with HST (13%). For members located in New Brunswick, Newfoundland and Labrador, Nova Scotia and Prince Edward Island, substitute GST with HST (15%).

The reports from ACP Committee Chairs and ACP representatives to the many publishing related associations in which we participate reflect an active and productive year for the ACP. Here are some of the achievements of 2017-18:

Government and Funder Relations

- Held a successful lobbying week in Ottawa for ACP board and staff, which included:
 - A reception on Parliament Hill attended by Minister of Canadian Heritage Mélanie Joly, her Parliamentary Secretaries Sean Casey and Arif Virani, members of cabinet, MPs, senators, and parliamentary staff;
 - Meetings with 58 MPs and senators, including members of the Standing Committees on Heritage, Industry, and Finance;
 - Meetings with government officials including the Chief of Staff to the Minister of Canadian Heritage, PMO staff, Treasury Board staff, and policy advisors to the Minister of Finance and the Leader of the Official Opposition;
 - Networking dinner with key senior bureaucrats and funding partners;
 - A seminar on the publishing process for parliamentary staff and MPs.
- Appeared before the Standing Committee on Finance as part of its 2018 Pre-Budget Consultations.
- Met regularly with policy advisors to the Minister of Canadian Heritage.
- Submitted a briefs to:
 - the Standing Committee on Finance's 2018 Pre-Budget Consultations;
 - the Department of Innovation, Science and Economic Development's consultation on reform of the Copyright Board of Canada;
 - Global Affairs Canada's consultation on the renegotiation and modernization of NAFTA;
 - Canadian Heritage's Office of Investment Review on the importance of Canadian ownership of the book industry in the context of NAFTA.
- Commissioned research on foreign investment and the ownership policy in the book industry.
- Participated in consultations on proposed tax changes for small businesses.
- Participated in annual consultations between Canadian Heritage, Canada Council, Livres Canada Books, and national publishing associations.
- In partnership with other writing and publishing organizations, launched the "I Value Canadian Stories" campaign, in anticipation of the 2018 review of the *Copyright Act*.

Professional Development

- Supported 10 mentorships for ACP members.
- Provided registration subsidies for 15 Canadian publishers attending the BookNet Canada Tech Forum and ebookcraft.
- Provided registration subsidies for 31 Canadian publishers attending Book Summit, PubWest Conference, Digital Book World, and other publishing conferences, workshops, and courses.
- Presented eight PD sessions at the 2017 AGM in Toronto, and seven PD sessions at the 2018 Mid-Winter PD & Meeting in Toronto, in partnership with the LPG.

Marketing

- Launched 49th Kids, an extension of 49th Shelf to market books to parents, librarians, and teachers.
- In partnership with the OBPO and supported by the OMDC through the Canadian Books in Ontario Schools initiative, launched 49th Teachers, which extends 49th Shelf's content to include teacher resources.
- Continued to host BC Books Online (ABPBC), Open Book (OBPO), and All Lit Up (LPG).

- Provided facilitation support for a meeting of Canadian independent booksellers interested in working together collectively.
- Coordinated appointments for members with Amazon.ca staff at the Mid-Winter Meeting, and met three times with Amazon.ca representatives in Toronto.
- Coordinated two collective displays on behalf of the Higher Education Committee at the Association for Canadian Studies in the United States (ACSUS) bi-annual conference and National Women's Studies Association (NWSA) annual conference.
- Completed two Top Grade mailings of sample books and promotional materials, to both K-8 and High School library decision makers.
- Initiated development of a best practices document to inform educators' acquisition of digital resources.
- Hosted sixth annual networking dinner for members at the Frankfurt Book Fair (October 2017), and ninth and tenth annual networking dinners at the Bologna Book Fair (April 2017 and March 2018).
- Continued administration of buying groups for BookNet Sales Data and CataList.

Communications

- Participated in media interviews with the *Globe and Mail*, CBC, the *Hill Times*, *Education Weekly*, *University Affairs*, *Publishers Weekly*, *Publishing Perspectives*, and *Quill and Quire*.
- Provided overview of the Canadian copyright climate to *Publishers Weekly* for publication at the Frankfurt Book Fair.
- Published op-ed on Canadian publishers' digital engagement in *Quill and Quire*, in the context of new funding initiatives of the Canada Council.
- Presented on ACP activities at APMA annual general meeting.
- Launched updated ACP website.

Research

- Commissioned a sector profile to establish a baseline measure of the economic and cultural impact of the English-language, Canadian-owned book publishing sector.
- Continued quarterly sales survey of ACP membership to track trends of print, digital, and audiobook sales.
- Under the direction of the Diversity and Inclusion Committee, struck at the 2017 AGM, developed a survey to establish a baseline measure of the demographic makeup of the Canadian publishing industry.

Pan-industry Initiatives

- As a member of Canada FBM2020, continued to work with ANEL and other stakeholders to prepare for Canada's participation as guest of honour at the Frankfurt Book Fair.
- Assisted Livres Canada Books in staffing the Canada stand at the Frankfurt Book Fair.
- Participated in an industry symposium on Canadian and Australian book publishing policy.
- Represented Canadian-owned publishers on the boards of the Book and Periodical Council, BookNet Canada, Canada FBM2020, Canadian Coalition for Cultural Diversity, Canadian Copyright Institute, Livres Canada Books, and the Public Lending Right Commission; and on the OMDC's Book Industry Advisory Committee, OLA's Forest of Reading Advisory Committee, and Access Copyright's Member Advisory Committee.

Membership

- Welcomed seven new members (Bedside Press, Bunim & Bannigan Ltd., Durville Publications, Freehand Books, Municipal World Inc., ROM Press, Running the Goat Books & Broadsides) to the association, and welcomed back one previous member (Hancock House Publishers).

A. Promote financial sustainability and profitability for Canadian-owned publishers.

A1: Advocate for stable, adequate, and well-administered government support.

- Participate in 2019 Pre-Budget Consultations, with focus on an increase to the Canada Book Fund
- Maintain relationships with the Minister of Canadian Heritage and MPs, including Parliamentary Secretaries to Minister of Canadian Heritage and members of the Standing Committees on Heritage, Industry, and Finance.
- Maintain relationships with policy advisors to Minister of Canadian Heritage and Minister of Finance.
- Meet regularly with Heritage staff responsible for book publishing policy and programs.
- Continue to build relationships with senior staff at Canada Council for the Arts, and staff across the programs of the New Funding Model.
- Refresh advocacy toolkit for members to support meetings with MPs in local ridings.
- Build closer ties to l'Association nationale des éditeurs de livres to amplify key advocacy messages.

A2: Work with other rightsholder groups to establish and promote a practical system of compensation for use of copyright materials.

- Promote fair compensation to rightsholders through participation in Parliamentary Review of the Copyright Act.
- Participate in Access Copyright Member Advisory Committee and advocacy committees.
- In partnership with other rightsholder groups, seek intervener status in appeal of *Access Copyright v. York University*.
- Maintain engagement with business development plans of Access Copyright.

A3: Foster innovation and best practices in the Canadian-owned sector.

- Promote mentorship program regularly, particularly to new members.
- Collaborate with affiliates and other industry associations to ensure effective PD, delivered with optimal efficiency.
- Continue to advocate for government support of travel for publishers to attend professional development programs.

A4: Provide support for succession planning.

- Offer mentorships to those planning for succession.
- Provide a forum for members to discuss strategies for succession.
- Explore professional development opportunities for those interested in purchasing a publishing company.

B. Increase the market share for Canadian-published print and ebooks.

B1: Improve the discoverability of Canadian books among the general public.

- Through the indie bookseller task force, continue to foster increased collaboration among and with independent bookstores.
- Complete redesign of 49th Shelf to ensure the site and affiliated platforms are consistent with current best practices and industry standards.
- Maintain regular input to Investment Review in interest of supporting Canadian ownership throughout the book supply chain.

B2: Increase the capacity of ACP members to compete in the K-12 market.

- Pursue development of best practices around digital resource acquisition for the K-12 education sector.
- Act as a coordinator between members and regional affiliates to advocate for the use of Canadian books in schools.
- Support the launch and promotion of 49th Teachers to highlight the availability of Canadian books and teacher guides.

B3: Increase the sale of ebooks through targeted marketing initiatives.

- Through eBOUND, develop focused promotions with retailers and other vendors.

C. Raise the profile of the Canadian-owned book-publishing sector.

C1: Develop a program of regular research on the economic and cultural value of the Canadian-owned book sector and on specific issues as they arise.

- Release sector profile of the English-language, Canadian-owned publishing sector to establish a baseline for future research and measure the impact of our sector.
- Establish a consistent reporting group for quarterly sales survey to develop a representative “ACP index” that will identify and monitor trends.

C2: Establish regular communication with appropriate media.

- Invite key media contacts to meet with members and/or present to ACP members at membership meetings.
- Produce regular op-ed pieces for publication in national media.
- Seek opportunities for appearances by staff, board, or members, on media programs relating to books.

C3: Upgrade the ACP’s public-facing communication technology.

- Maximize features of ACP’s upgraded website, to enhance member communication.
- Continue to build ACP’s social media audience to optimize value of this channel.

C4: Establish active communication channels with the education sector.

- Seek opportunities to meet with representatives of K-12 and post-secondary education sectors.

C5: Raise awareness about the infrastructure and economics of Canadian-owned publishing within the book sector.

- Seek opportunities to meet with and present to a variety of writing, publishing, and reading organizations.

D. Promote awareness of the value of books, reading and copyright as public good.

D1: Promote the value of books that reflect the cultural diversity of Canada’s population.

- Support the work of ACP’s Diversity and Inclusion Working Group to establish programs that will encourage more diverse participation in Canadian publishing, and explore partnerships with organizations working in this area.
- Continue promotion of Children’s Committee initiatives showcasing books on diverse subjects and themes.

D2: *Maintain support for positive reading initiatives while discouraging those that undercut public investment in libraries and reading education.*

- Maintain annual donation to National Reading Campaign (NRC).

D3: *Participate in awareness programs on copyright.*

- Participate in pan-industry initiatives to advocate for fair compensation for the use of copyright-protected work.
- Amplify the work of the “I Value Canadian Stories” campaign.
- Participate in review of the *Copyright Act*, and act as a coordinator for regional affiliates around copyright issues.

E. Strengthen the resource base of the ACP.

E1: *Optimize the ACP's reserve.*

- Maintain reserve to cover four to six months' operating expenses.
- Refine sponsorship program to support ACP initiatives for which other sources of funding is unavailable.
- Initiate membership drive to recruit new members, and encourage former members to re-join ACP.

E2: *Establish ad hoc and/or ongoing sponsorships and partnerships for activities such as research, eBound, travel support, etc., and for purchase of print and ebooks in quantity.*

- Launch fundraising campaign to support ongoing research program, described in point C1, above.



COMMITTEE REPORTS

It has been a busy period of expansion and development on and around 49th Shelf over the past several months.

In addition to actively maintaining a number of affiliated sites, including BC Books Online and Open Book, we have also completed another cycle of incremental development for All Lit Up. Major initiatives in 2017–18 include the following:

- The introduction of a fully featured event calendar, with a great deal more functionality and flexibility for the ALU team in managing and presenting event information.
- The development of a new Indigenous Books landing page. Eventually, this page will become the focal point of our first effort to fully integrate Thema subject codes. For the moment, it showcases Indigenous works based entirely on editors' selections.
- A new territorial rights mechanism to support the sales of e-books outside of North America. These new components will determine the user's location and adjust the availability for purchase status of e-books accordingly based on the rights information supplied in the ONIX record.

Within 49th itself, we are fully engaged in two major initiatives this year: 49th Kids and the larger 49th redesign.

49th Kids

In spring 2017, we released 49thKids.com as a major expansion of the 49th Shelf platform. In the fall, we secured additional targeted funding in collaboration with OBPO (funding from OMDC) for the further development of the site. This funding comes from the new Canadian Books in Ontario Schools Fund, which is administered by OMDC on behalf of the Ministry of Culture. The fund is part of a new provincial strategy to increase the use of Canadian books in schools announced by Ontario in July 2016.

This has allowed us to accomplish the following:

- We have strengthened the title listings, display, and search and browse behaviours across the site. 49th Kids now lists nearly 20,000 kids' and YA titles and a solid archive of themed reading lists.
- We have built out a companion site—49th Teachers—with additional orientation material for teachers and librarians, themed title selections corresponding to the Character Development components in the Ontario primary curriculum, and an archive of integrated classroom resources.
- As of this week, the site will feature more than 600 classroom resources, all supplied by publishers. We have invented a simple data schema for marking up these files and consistently associated them with their corresponding books.
 - On a related note, we have also created a separate import process to load and index them properly on the site. Our work in this respect is ongoing, in terms of our active engagement with publishers across the country to strengthen ONIX data for 49th Kids as well as additional teaching resources. As a result, we expect that both the title listings and the classroom resources included on the site will continue to expand in the weeks and months ahead.
- We have also resigned the 49th Kids interface and will shortly implement a new and more polished design across the site.
- Otherwise, active work on the site will continue for some months as we continue to add additional features and content specifically for educators.

49th redesign

The 49th redesign is continuing as well. We have circulated preliminary briefs to summarize findings from user research conducted through the fall, set out the basic strategies for the redesign, and to preview

wireframe models for key landing pages. The design process continues this spring and we will then be integrating the new responsive design into the site and reengineering much of 49th over spring and summer.

This is a rare and important opportunity for the project and we have taken extra care to consult widely and gather additional user input to guide the redesign process. More than interface design alone, we expect that the redesign effort will have some important knock-on effects in terms of how we organize the editorial program for 49th as well as our ongoing marketing and outreach activities.

Funding

Three items of note on the revenue side:

1. We have just gone through the renewal process again for the Amazon.ca sponsorship on 49th Kids, and are pleased to announce that it has been renewed for 2018–19.
2. In the fall, we filed a two-year application for our major operating grant with the Canada Book Fund. A two-year contribution was confirmed by CBF in early May 2018.
3. We are fielding a broader user survey this spring to further assist us in the redesign process, but equally to support some of our ongoing sponsorship development activities. Along with expanded revenue from licensing and development support for affiliated sites, we intend to build the sponsor base further in the current fiscal.

Submitted by,

Craig Riggs
49th Shelf Consultant

David Caron
Advisory Group Chair

The children's committee continued its valuable work aided by the efforts of Emily Kellogg over the course of the year and a number of projects were continued and implemented.

Among the initiatives carried out over the year were:

Top Grade: CanLit for the Classroom

The purpose of the Top Grade project, now in its eighth year, is to support children's publishers in promoting their books directly to school library decision makers through the shipment of sample copies, promotional pieces, and other teaching resources. Under the guidance of consultant Catherine Mitchell, the project continued this year with a fall and spring mailing to 100 K-8 and 75 High School educators and school library decision makers in three territories and ten provinces. 13 publishers participated in the fall 2017 promotion and 11 publishers participated in the spring 2018 promotion.

The response to the project remains positive, with over 80% of recipients indicating they plan to purchase titles included in the mailings.

Bologna Dinner

The annual Bologna Dinner celebrating the opening of the Bologna Book Fair took place on Sunday, March 25, 2018, at Trattoria Battibecco. The dinner hosted 35 attendees: a mixture of publishers, international colleagues, and media. Many thanks to Judy Brunsek for her continued assistance in organizing the dinner.

49th Shelf: kids.49thshelf.com

While not an ACP Children's Committee project, we also want to highlight the new 49th Shelf kids site, which launched in summer 2017. Additionally, a new site for teachers, <http://kids.49thshelf.com/For-Teachers>, launched in spring 2018 with funding from the OMDC through the OBPO. New teaching resources continue to be uploaded to the site and publishers with available teaching resources are encouraged to reach out to Craig Riggs or Adrienne Guthrie. Outreach to educators continues, coordinated by the OBPO and led by Helen Kubiw, teacher and blogger.

We would like to thank all the volunteers who supported the work of the committee over the past year and in particular, we would like to thank Emily Kellogg for her continued support of the committee's activities over the past year.

Respectfully submitted,

Karen Boersma and Andrew Wooldridge
Co-Chairs

The Diversity and Inclusion Committee was struck at last year's AGM following the unanimous support of the following motion:

Whereas the ACP membership passed a motion at the 2016 AGM endorsing the Canada Council and Department of Heritage initiatives made in the spirit of reconciliation; and whereas the members recognize that Indigenous people and racialized Canadians are vastly underrepresented in the Canadian publishing industry; and whereas "change does not roll in on the wheels of inevitability"; we direct the ACP board to form a working committee, which shall be open to all interested member publishers, and which shall consult with and collaborate with Indigenous and racialized communities with the goal of finding solutions to this underrepresentation. The committee shall report their findings to the membership at each AGM and mid-winter meeting beginning with the 2018 Mid-Winter Meeting.

A call for volunteers was issued to members and the inaugural meeting of the working committee was held in early fall via conference call. The working committee identified conducting a baseline survey to assess the state of diversity in Canadian publishing as a priority.

A subcommittee, made up of Amanda Crocker (Between the Lines), Wendy Whitebear (University of Regina Press), Annie Gibson (Playwrights Canada Press), and Tonya Martin (McKellar & Martin), met throughout the fall to develop a draft survey. In developing the survey we were able to draw on the expertise of consultants at Nordicity, engaged by ACP for a separate project, who have created similar surveys in other sectors. The first draft of the survey was presented to the full working committee in winter 2018, and the second draft of the survey was shared with the group in spring 2018.

The baseline diversity survey is expected to be distributed following the AGM. Following the tabulation of results, a communications strategy and action plan will be developed by the working committee.

Submitted,

Emily Kellogg
Program Manager

The committee met in January with the big action item being development of a best practices document to support K-12 educators and provincial departments of education in their acquisition of digital content. This recommendation was among those listed in the report *Consultation on the Digital Trends and Initiatives in Education: The Changing Landscape for Canadian Content*, which was commissioned by the committee in 2016-17 and co-authored by Brian O'Donnell and Susan Howell. The report reinforces the importance of working with partners at the Ministries of Education for potential acquisition of digital content. The committee put forward the recommendation and the ACP board agreed to hire Brian to work on a proposal, with the main purpose of this exercise being to create a best practices document.

Through his initial research, Brian recommended two actions. First, before committing funding to produce a best practices document, the ACP should seek a suitable partner from the library or education sector with whom to work on this initiative. Once that is done, we will outline the steps, timeframe and budget needed to produce the document and gain endorsement from the Ministries of Education.

Then, if all parts of the community agree, a best practices report would be developed working with the individual provinces to find out what works where and how those actions can be transferred to other jurisdictions.

Submitted by,

Terrilee Bulger
Co-Chair

The Export Committee has met three times since last year's AGM in Toronto (including during the Mid-Winter Meeting in January). I would like to thank everyone who participated in the committee's teleconferences and in-person meetings, providing their ideas, descriptions of their own firm's activities, and suggestions on a number of policy fronts.

Key topics of ongoing interest raised throughout the year are found below.

Livres Canada Books (LCB)

With the board terms of Caroline Fortin, Québec Amérique, and Bob Dees, Robert Rose, ending, the Export Committee sought to nominate two new ACP members as directors to the LCB board in time for its September AGM. I'm very pleased to report that two excellent candidates stepped forward: Philip Cercone, McGill-Queen's University Press, and Margie Wolfe, Second Story Press. Congratulations to both, and thank you for joining Andrew Wooldridge and Semareh Al-Hillal on the board as ACP reps to represent the association.

Cultural Trade Mission to China

During the Export Committee's October 31 teleconference, the main focus of the discussion revolved around Minister Joly's April 2018 cultural trade mission to China and the omission of any specific mention of a Canadian publishing as a target sector for the mission. This oversight was set within the context of two broader concerns, namely:

- frustration about a general disregard for books among DCH's broader programs and policy; and
- concern that FBM2020 might be, or is being, regarded as the only vehicle for promoting Canadian authors, books, and publishers abroad.

The discussion led to the request that ACP work to facilitate by any means available the inclusion of at least one publisher as a member of the trade mission. A call went out to the Export Committee to see if anyone was planning to apply to be a trade mission participant. Lisa Lyons Johnston, president of Kids Can Press, responded in the affirmative. The ACP Board approved endorsing Lisa's application and Kate Edwards then wrote a letter highlighting Lisa's publishing and export experience, affirming her as a strong candidate to represent the Canadian publishing sector. Lisa's application was successful and Kids Can was among the companies who formed the delegation that travelled with Minister Joly to China in April.

NAFTA Working Group

Established as a result of a motion during the 2017 Mid-Winter Meeting, the NAFTA working group comprises: Philip Cercone; Kirk Howard; Jeff Miller; Andrew Wooldridge; and Glenn Rollans, with me in the role of facilitator. Immediately following the Mid-Winter Meeting, the group met to discuss strategy, deciding that circulating a background paper on the importance of the cultural exception was the best first step. Carolyn Wood wrote an excellent paper, including an overview of the pre-NAFTA publishing climate and the impact of NAFTA on publishing, both from cultural and economic perspectives. The paper was circulated to the ACP membership and sent out more broadly to federal and provincial ministries (PMO, Global Affairs, Dept. of Heritage, etc), key negotiators, and other stakeholders.

In late May, Kate submitted the ACP's annual brief to the Office of Investment Review, focusing on NAFTA as it relates to the ownership policy in the Canadian book industry. In July 2017, Global Affairs Canada launched public consultations on the renegotiation and modernization of NAFTA.

Export Committee

Following approval by the board, ACP submitted a brief titled “Canadian Book Publishing and NAFTA.” The brief, which identified Canada’s *Copyright Modernization Act* as an irritant to Canada’s trading partners as well as to its domestic publishing sector, called for the following recommendations:

- maintain the cultural exception
- renew commitment to Canadian ownership of cultural industries
- adopt a consistent interpretation of the Berne Convention three-step test to ensure compliance with international treaty obligations
- strengthen and enforce piracy laws
- maintain a trilateral agreement with Mexico and the United States

Note: a copy of both documents mentioned above were sent to heads of firms. If you didn't receive a copy, please let ACP staff know.

Later in July, the ACP was asked by Global Affairs and the Dept. of Canadian Heritage to provide input on submissions made to the United States Trade Representative on issues pertaining to cultural industries and intellectual property. While not all submissions were within the ACP’s remit for comment, the request for feedback provided the opportunity to respond directly to the International Intellectual Property Alliance’s call to end cultural exceptions, which cited denial of market access as business impediment.

Over the past number of months Kate and Glenn Rollans have participated in calls coordinated by Global Affairs Canada to update stakeholders on the negotiation. The government’s public support for maintaining the cultural exception, first articulated by Minister Freeland at the start of the negotiations, remains unchanged at this writing. In December, the working group’s mandate was expanded to include consideration of other trade agreements—most notably, for now, CETA and TPP. This request arose in recognition that the chapter-based approach to the cultural exception (and other cultural IP issues) utilized in CETA and TPP may very well have implications for the renegotiation of NAFTA. We appreciate the work of the Coalition for Diversity of Cultural Expression on this issue, in particular a paper they commissioned to evaluate the strength of cultural protections put forward in the original TPP agreement. Thanks to Catherine Mitchell, ACP’s representative to the coalition, for keeping us informed.

The NAFTA negotiations continue to grind on, often baffling and frustrating those most closely involved in shaping the outcome. A special thanks to Philip Cercone, who has kept the working group apprised of the fascinating political backstory constantly underway as the talks lurch two steps forward and one step back.

Global Affairs: List of Trade Commissioners and Other Consular Officials

The Export Committee met by conference call on March 14. The focus of the discussion was how to make best use of the Global Affairs list of trade commissioners and other consular officials.

It was generally acknowledged that embassies most often don’t respond to updates and news from the ACP and other cultural associations—unless there is a direct tie-in with a specific government mandate (e.g. mandate to increase cultural exports, or focus on Canadian history, Canada 150, etc.). Also, LCB does a very good job of communicating with embassies, so any action undertaken by the ACP should complement those activities, not compete with them.

The group agreed on several broad goals:

- work with select embassies that have already demonstrated energy , momentum, and passion about Canadian books
- explore a collaborative ACP/LCB newsletter or some similar way to send to embassies around the world updates on Canadian books
- assess other means through which to have consistent and proactive communication that will help consular staff keep Canadian books in mind

Next steps:

- Consider the best way to gather ACP member press releases as potential missives to embassies.
- Find out what the LCB is doing with its lists and if there is room for collaboration.
- Identify embassies that have been, historically, supportive of Canadian books and authors. The immediate shortlist includes London, Frankfurt, Beijing, and Seoul.

An update on the progression of the next steps will be presented at the Export Committee meeting during the AGM.

My sincere thanks to Kate and Emily Kellogg for all of their thoughtful assistance in supporting the Export Committee's activities—and a warm welcome to Jazz Cook.

Respectfully submitted,

Melissa Pitts
Chair

Since the 2017 AGM, the Higher Education Committee met on 22 September 2017 and at the Mid-Winter Meeting in January 2018. Full minutes of the meetings of the Higher Education Committee are distributed through the email list for the Committee, and are available to other members on request.

Copyright

At all Higher Education Committee meetings this year, there has been extensive discussion of copyright and the sorts of lobbying we should be engaging in on this issue. We welcomed the July Federal Court ruling on the York University copyright case that came out decisively in favour of Access Copyright and the authors and publishers they represent. The decision deemed the Fair Dealing Guidelines adopted by the education sector as “not fair in either their terms or their application,” and it also found that tariffs determined by the Copyright Board are mandatory. York University has applied for an appeal of this decision. Despite the rulings, the universities and colleges have not changed their policies, arguing that they will wait to see what happens as the appeal process moves ahead.

The general feeling among Committee members was that the most promising route for solutions to this copyright problem will be political. The ACP staff and Board have prioritized the copyright issues in their Ottawa meetings throughout the year. Committee members have been encouraged to write to or meet with their local MPs and provincial representatives on the subject of copyright and the York decision. At various times throughout the year, templates have been circulated to assist with this.

In 2018-19, the Industry Committee of the federal government is leading the Parliamentary Review of the *Copyright Act*, and in April they invited the public to submit briefs on the subject. In addition to the ACP submission, members of the Higher Education committee have been encouraged to submit their own briefs as Industry Committee members have indicated that they are interested in hearing from those who have been affected by recent changes to the *Copyright Act* in their own words.

The federal government has indicated that copyright hearings will be held in five cities across Canada in May. The Higher Education Committee has worked with ACP staff to develop a package to assist ACP members and regional publishing associations in submitting briefs and appearing as witnesses at the hearings. The Higher Education Committee also coordinated a request to members to present at the hearings or participate in open mic sessions.

Open Education Resources (OER)

New developments in OER have been a regular subject of discussion at Higher Education Committee meetings this year. Thus far, the purpose of these discussions has primarily been to share information with one another and there have been no specific action items. We have watched with interest the growth of provincially-funded OER programs, with eCampus Ontario recently joining BCcampus Open Ed Resources in providing support for these initiatives. Some Committee members have attended eCampus Ontario meetings and brought back reports to the Committee. A good resource to learn about the current state of OER is the OCUL white paper on OER that was circulated to the Committee.

Collective Displays

Renée Knapp (Between the Lines) staffed two collective displays in 2017 at ACSUS (October 2017, Las Vegas, NV) and NWSA (November 2017, Baltimore, MD) conferences. ACSUS did not proceed smoothly: the exhibit space was somewhat disorganized and some materials were lost or destroyed on the way to the conference. NWSA went well and attracted a lot of attendees.

An initial call was put out to gauge interest in 2018-19 collective displays. The Higher Education Committee is coordinating development of a marketing contact list of ACP members to be used for surveys of interest in international collective displays (and other ACP joint marketing initiatives). A survey of ACP member marketing people will be undertaken in early May to determine collective displays for 2018-19.

Many thanks to all who have participated in the Higher Education Committee this year, and many thanks to the ACP staff for supporting the work of the Committee.

Submitted by,

Leslie Dema and Wayne Antony
Co-Chairs

Board Members

The terms of the following members are up as of this AGM:

- Semareh Al-Hillal
- Lynn Fisher
- Matt Williams
- Andrew Wooldridge

The following people have agreed to stand for nomination as members-at-large:

- Amanda Crocker (Between the Lines)
- Ruth Linka (Orca Books)
- Lara Mainville (Les Presses de l'Université d'Ottawa / University of Ottawa Press)
- Brendan Ouellette (Annick Press)

Officers of the new board will be elected by that board, with recommendations from this committee as follows:

President:	Glenn Rollans (Brush Education)
Vice-President:	Melissa Pitts (UBC Press)
Treasurer:	Karen Boersma (Owlkids)
Secretary:	Sean Guistini (Nunavut Arctic College Media)

Member Committees

The following appointments will be recommended to the incoming ACP board:

Children's:	Co-Chairs	Karen Boersma (Owlkids) Ruth Linka (Orca Books)
Diversity and Inclusion:		No chair
	Board Liaison	Greg Younging (Theytus Books)
Education:	Co-Chairs	Terrilee Bulger (Nimbus Books) Rick Wilks (Annick Press)
Export:		Melissa Pitts (UBC Press)
Higher Education:	Co-Chairs	Wayne Antony (Fernwood Books) Leslie Dema (Broadview Press)
Library:		TBC
P.D.:		Brendan Ouellette (Annick Press)
Special Events:		Renée Knapp (Between the Lines)
	Board Liaison	Lara Mainville (University of Ottawa Press)
Trade:	Co-Chairs	Karen Brochu (House of Anansi / Groundwood) Amanda Crocker (Between the Lines)

Board Committee

Nominating and Governance: Glenn Rollans (Brush Education)

Advisory Groups

49th Shelf: David Caron (ECW Press)

Thank you very much to committee members Lynn Fisher, Melissa Pitts, Glenn Rollans and Andrew Wooldridge, and to Kate Edwards.

Submitted by,

Matt Williams
Chair

In the past year, the Professional Development Committee followed two major tracks in programming: firstly, inviting luminaries to present on timely subjects from accessibility, equity, education, to Truth and Reconciliation; and secondly, leveraging the expertise of the membership to discuss how we can improve our core publishing practices like marketing, inventory management, and digital production.

The 2017 Annual General Meeting took place from June 5 to 7 at the Hyatt Regency in Toronto. The committee arranged eight sessions addressing equitable and accessible access to books, metadata best practices, regional marketing campaigns, and copyright in Indigenous communities. An opening address from Chief R. Stacey LaForme from the Mississaugas of the New Credit First Nation was a big highlight.

The 2018 Mid-Winter Meeting was held in the Appel Salon of the Toronto Reference Library from January 30 to 31. The seven sessions included a panel discussing audiobook production, vendor meetings, Indigenous approaches to education, sales force executives on the changing needs of booksellers, and a workshop on publishing workflows.

We look forward to taking up issues of gender equity in the workplace at our upcoming AGM in Montreal, along with presentations on works in translation, the guest of honour status for Canada at the 2020 Frankfurt Book Fair, and more.

The committee welcomes new participants and perspectives. We have incorporated feedback from member questionnaires, ideas that have come up in conversation and in the news. It's our hope that these sessions are of use to members in their publishing activities throughout the year. We are eager to hear your feedback, so please send ideas to the ACP office or ask about how you can get involved.

Big thanks to the members of the committee, and Kate Edwards, Emily Kellogg, Inna Shepelska and Jazz Cook, who have added so much shape to our discussions this year.

Respectfully submitted by,

Brendan Ouellette
Chair

Matt Williams
Board Liaison

Mid-Winter Meeting (MWM)

The ACP's annual MWM took place from January 30 to 31, 2018, at the Appel Salon at the Toronto Reference Library. An informal pub night, sponsored by Webcom, was held at Glad Day Bookshop in Toronto.

Annual General Meeting (AGM)

The AGM is scheduled from June 4 to 6, 2018, at La Plaza Congress Centre, Montréal, and the annual banquet will take place at Restaurant de l'ITHQ—Institut de tourisme et d'hôtellerie du Québec, 3535 Rue Saint-Denis on 5 June 2018.

A welcome reception hosted by the Association des éditeurs de langue anglaise du Québec will be sponsored by Marquis Book Printing the evening of June 4, 2018

2019 Mid-Winter Meeting (MWM) and Annual General Meeting (AGM)

The ACP's 2019 MWM is tentatively scheduled for January 29 through 30, 2019, in Toronto, and the AGM will be held in June 2019 in Toronto, ON. Details will be finalized shortly.

Thank you to fellow committee members Michaela Cornell (Kids Can Press), Sean Guistini (Nunavut Arctic College Media), and Hazel Millar (Book Thug) for their contributions, and to our Montreal sub-committee Linda Leith (Linda Leith Publishing), Simon Dardick (Véhicule Press), Susan McIntosh (McGill-Queen's University Press), and local liaison Anna Leventhal (Association des éditeurs de langue anglaise du Québec), and, of course, Kate Edwards, Emily Kellogg, and Jazz Cook for keeping us organized.

Submitted by,

Renée Knapp
Chair

Semareh Al-Hillal
Board Liaison

The Trade Committee has met twice since the 2017 AGM: 24 November 2017 and 30 January 2018.

Amazon

ACP has met twice with Amazon.ca staff since the 2017 AGM, and Kate Edwards, Lynn Fisher, and Barbara Howson are scheduled to meet with Rick Logan (Category Leader, Canada Media) and Alex Gagnon (Vice President Amazon Canada and Mexico) on 23 May 2018, who will be in Toronto for the Amazon First Novel Award. Though we have met many times with Rick, this will be the first meeting with Alex. A notice was sent to the Trade Committee for agenda items. There will be a further update on this meeting at the AGM.

Key issues the committee has raised with respect to Amazon over the past year include:

- the introduction of the “buy button” and subsequent loss of sales to third-party vendors;
- ongoing concerns regarding the sourcing of books to sell through .ca (i.e. sourcing from .com);
- issues around the receiving of stock by Amazon’s Toronto area warehouse;
- increased demands for co-op/discount;
- Amazon Marketing Services (AMS) and Vendor Self-Service Promotions (VSSP).

In response to member interest, ACP coordinated a webinar on the Amazon Marketplace program, which was held March 1. Twelve publishers attended the session, which demonstrated how publishers can operate as a third-party vendor on Amazon.ca.

We were joined by Amazon.ca staff at the 2018 Mid-Winter Meeting. Rather than present to the entire membership, the focus of this visit was one-on-one appointments with members. Feedback from members indicated that the Amazon staff present were too junior to make the meetings effective, but in general this activity is seen to be a valuable way to keep the channels of communication open between Amazon and Canadian publishers.

At Rick Logan’s suggestion, Amazon.ca staff also presented a “Back to Basics Vendor Operations” seminar at the Mid-Winter Meeting. This session focused on supply chain basics, and a recording of the session is available for those unable to attend in person.

Indigo

Krishna Nikhil, Indigo’s Senior Vice President of Print, resigned in November. Kate has reached out to Rania Hussein who has replaced him, to arrange an introductory meeting with her, Kate, and the chairs of the Trade Committee. Unfortunately, we have not been able to settle on a date due to scheduling issues. We would like to discuss Indigo’s expansion plans, especially in the US.

Indie Bookseller Task Force

Margaret Bryant represented ACP at Bookmanager Academy in June 2017. Discussions at that conference suggested that there was interest among indie booksellers in working collectively, which the ACP task force supported by issuing a call to connect those who were interested. This call was distributed through Bookmanager, Ampersand and Dundurn’s indie bookseller newsletter.

Approximately 20 booksellers from across the country expressed interest. A proposal was brought from the task force to the wider Trade Committee to use the budgeted funds to support indie bookseller outreach to assist in organizing the group. The committee offered its support for this proposal at its November meeting, and a follow-up notice was sent in early December to booksellers who had responded to the initial notice.

The task force was clear that ACP would not serve as organizer for the group, but would support their efforts.

At the 2018 ACP Mid-Winter Meeting, the task force had not yet heard back from the group and assumed a lack of interest on their part. This was premature, and in the weeks that followed we learned that a group of booksellers were talking and reached out to the ACP. ACP maintained our original offer—to provide funds to help them get going.

ACP contracted Jennifer Murray, Porch Light Consulting, to help booksellers with their initial discussions. She held a preliminary call with a steering group, and a larger meeting of 19 booksellers took place on 4 May 2018. BookNet Canada assisted by providing web meeting services. Participants were in support of forming a new organization (the Canadian Indie Booksellers Alliance), and a working committee was struck. The group will meet in the coming weeks to develop a mandate and mission statement, determine long and short-term goals, and establish a membership and fee structure.

Apple

Nic Boshart, Editor, iBooks Canada, presented an update on marketing opportunities offered through the iBookstore at the 2018 Mid-Winter Meeting. One-on-one appointments with members were also offered.

An update to Apple's iBooks app has been publicly reported in the media and we will monitor developments on this front in the coming months. A follow-up presentation from Nic on this subject may be worthwhile.

Audiobooks

Audiobook sales channels have been added as a regular agenda item at Trade Committee meetings.

Changes in the Chairing of the Trade Committee

This will be our final report as we will both be stepping down as co-chairs of the Trade Committee following the AGM. It has been a pleasure to work on behalf of ACP trade publishers. Thank you.

Submitted by,

Lynn Fisher and Barbara Howson
Co-Chairs



REPRESENTATIVE REPORTS

The impact of the education sector's copying policies has now hit Access Copyright affiliates in full. Access distributed \$6.744 million to right holders in 2017, which represents a 46% decrease from 2016 distributions, and a 78.1% decline from 2012. All this despite the annual uncompensated copying of 600 million pages of published works by the Canadian education sector; licensing revenues from foreign sources now exceed those collected from Canadian K-12 and post-secondary institutions. These foreign payments and growth in corporate licensing revenue have provided some cushioning to Canadian rightsholders, but clearly challenges persist.

There are, however, encouraging signs. Access' victory in its legal action against York University was a high point of 2017. The Court was unequivocal in its decision that York's copyright policies and practices are arbitrary, unfair, and do not meet the Supreme Court's test for fair dealing. It also established that tariffs set by the Copyright Board are mandatory-users cannot "opt out." York is appealing the decision, but whatever the outcome the facts established by the Court will stand. The decision has put our sector on firmer footing as the Standing Committee on Industry, Science and Technology undertakes its review of the *Copyright Act*, and given that York's policies are virtually identical to those used by other post-secondary institutions and K-12 schools, the decision is critically important to discussions with the education sector as a whole.

On that front, Access was served with two lawsuits in February 2018 by the K-12 education sector: one by the province of British Columbia, and the other by the remaining provinces and territories (except Québec), with Ontario represented by the province's school boards. Together the plaintiffs seek to recover more than \$30 million in legally certified tariff fees collected by Access Copyright for the period of 2010–2012. BC's suit has since been dropped, but it remains to be seen what this might mean for a return to collective licensing in that province.

Against this backdrop, Access Copyright continues to act as a coordinator of advocacy work for our sector, and I meet regularly with ACP's counterparts at TWUC, CPC, ANEL, UNEQ, Copibec, and Access to strategize around our shared work in this area. The I Value Canadian Stories coalition has been a point of common cause among many Canadian rightsholder groups, and has provided a valuable public-facing campaign to highlight the link between a strong copyright framework and the continued creation of Canadian content. The site and accompanying social media tools will remain important to ACP and other groups over the course of the parliamentary review of the *Copyright Act* that is now underway.

The work of Access Copyright's Innovation Lab also continues, and with other stakeholders its small team is exploring the development of a blockchain-enabled rights management system. Watch for more information around this project in the coming year.

I remain a member of Access Copyright's Member Advisory Committee (MAC) as a representative of ACP. The MAC is intended to be a bridge between the Access board and membership, and I encourage members to be in touch if they have issues they would like to raise with either the MAC or the Access board.

Those interested in a more thorough report on Access Copyright's 2017 activities can find the agency's annual report online: http://www.accesscopyright.ca/media/115217/access_2017ar.pdf.

Submitted by,

Kate Edwards
ACP Representative
Access Copyright Member Advisory Committee

The Book and Periodical Council (BPC) is the umbrella organization for Canadian associations that are or whose members are primarily involved with the writing, editing, translating, publishing, producing, distributing, lending, marketing, reading, and selling of written words. BPC acts as a forum for its members to network, identify common goals and coordinate action to benefit the Canadian writing and publishing industry.

Freedom to Read Week 2018

Freedom to Read Week 2018 took place from 25 February to 3 March 2018. Events took place across the country and activity around social media was strong. BPC successfully made the transition to the Canada Council's New Funding Model and secured funding this year. Celebrated illustrator Jeff Lemire produced this year's FTRW poster, which was a hit. FTRW remains one of BPC's flagship programs and ACP is a proud sponsor of the initiative.

Planning has already begun for FTRW 2019, which will mark FTRW's 35th anniversary.

Freight & Distribution

Carrier recommendations for 2018–19:

- Small parcel category—Canpar will continue to be recommended in this category for the coming year.
- Rail and LTL category—National Fast Freight (NFF) will continue to be recommended in this category.
- Corrugation—We still have a very small corrugation program with Norampac.

ACP members are eligible for BPC's freight program. If you are not accessing BPC's rates already, contact Annie McClelland for more information.

Book Summit 2017

Held 15 June 2017, Book Summit was a success. The theme for the conference was "Publish Well and Prosper: Social and Economic Responsibility in the Book Industry" and was well-attended.

Book Summit 2018 will be held at Harbourfront Centre, in Toronto, on 14 June 2018. The theme of the conference is "Disrupt Your Publishing Game." At this writing, tickets are still available. To view the full schedule, please visit www.booksummit.ca. This activity is eligible for ACP's PD Subsidy Program, supported by the Department of Canadian Heritage. This year the Book Summit is being held in conjunction with the Canadian Writers' Summit.

Looking ahead to 2019, ACP, LPG and BPC are planning to partner on Book Summit and incorporate ACP and LPG's AGM PD programming into the Book Summit program. The partnership will ease the pressure for all organizations with respect to a very full June 2019 calendar and also allow ACP and LPG members to benefit from Book Summit's programming while maintaining dedicated sessions for independent publishers.

BPC Membership Activities

The BPC membership meets regularly for a series of "member hubs," which allow for information sharing and professional development. The group aims to meet three times per year. The Indexing Society of Canada joined BPC as a new member this year.

Book and Periodical Council

Thanks to Annie McClelland for her tireless work on behalf of BPC. The ongoing success of the organization's programs is the direct result of her efforts, and also the work of BPC's committees, including Freedom of Expression, Freight & Distribution, and Book Summit. If you are interested in getting involved, please be in touch with me or Annie.

Submitted by,

Kate Edwards
BPC Board Member



So long, 2018! It's time to look back on the previous year, crunch some numbers, and come out swinging for 2019.

Introduction

It is my pleasure to introduce this annual report on the activities and achievements of BookNet Canada (BNC). BNC has been fostering collaboration and improving adoption of technology within the Canadian book supply chain for more than fifteen years. By offering shared technology solutions alongside research and education on emerging technologies and processes, national and international standards, and the data we collect from sectors across the industry, we are able to provide the infrastructure necessary to sustain a healthy and effective book supply chain. In short, we support publishing companies, booksellers, wholesalers, distributors, sales agents, industry associations, libraries, literary agents, and the media as they work towards our common goals of growing the book market in Canada and increasing the reach of Canadian books internationally.

During the 2017–2018 year, we made significant strides towards reaching some of our major, long-term goals, including beginning to capture library circulation data, increasing integrations between our services for greater efficiency and usability, and growing the Loan Stars program, which is now entering its third year. At the same time, we are excited to see continued, sustained growth across all our project areas, from the number of users and reports run on SalesData to listens of our podcast. Many of these steps have us poised to accomplish significant goals in the coming year, such as our rebuild of the BiblioShare database, which will be invaluable in supporting our growth for the next fifteen years.

We are very grateful to our member organizations: Association of Canadian Book Wholesalers, Association of Canadian Publishers, Canadian Publishers' Council, Canadian Urban Libraries Council, Retail Council of Canada, Indigo Books & Music, and to the Government of Canada for generously providing ongoing support to BNC through the Canadian Book Fund. These partnerships enable us to make sure that the organization is meeting the needs of a very diverse group of industry stakeholders.

We invite you to review some of our achievements from the last year in the pages that follow, as we look forward to working with you in the next year, and beyond.

Thank you,

Noah Genner
President and CEO

Guiding Principles

BNC represents a cross-section of the Canadian book industry. Our mandate is to collaboratively improve the supply chain for the book industry by transforming information exchange, offering shared technology-focused solutions, and by providing technology and supply chain-related education and research for the benefit of the Canadian book industry. To accomplish this, we work with publishing companies, booksellers, wholesalers, distributors, sales agents, industry associations, and libraries across the country.

Short to medium-term benefit

The projects selected by the BNC Board of Directors reflect an interest in providing a tangible return on investment within the short- to medium-term. Projects are designed to deliver benefits throughout their lifecycle with clearly defined performance objectives and deliverables.

Facilitation during technological change

Each project is designed to address a key area of technological change, ensuring that book industry participants remain adaptable and capable of meeting new demands in publishing, retailing, wholesaling, and distribution.

Benefit to all stakeholders

Each of the project areas that BNC focuses on is designed to provide consistent benefit to all participants in the Canadian industry, whether they are large corporations or small businesses.

Focus on Canadian cultural producers

Each project also has components designed to “level the playing field” for Canadian cultural producers, providing them with tools, best practices, education, and services.

Empower process improvement

BNC provides tools, services, and knowledge to help our stakeholders make process improvements related to supply chain and technological innovation in their own organizations.

Collaboration and partnerships

Whenever possible and appropriate, BNC looks to partner and collaborate with other associations and organizations to provide coordinated benefits to the Canadian book industry.

BiblioShare

BiblioShare now boasts 2.7 million product records, more than 1.8 million cover images, and more than 135,000 interior images. The bibliographic aggregation system continues to serve the industry by allowing publishers, agents, the media, booksellers, and others to leverage the data and our associated tools to create better in-house workflows and improve efficiencies in the supply chain. As part of our ongoing mission to grow the data set and add usability for our myriad stakeholders, this year we started processing samples, excerpts, tables of contents, and readers’ guides that are not embedded in ONIX. We currently have approximately 9,000 samples and excerpts and this number continues to grow.

To meet the needs of our users, we have also built numerous custom solutions this year, including custom APIs, plugins, and other extracts. The data BiblioShare aggregates continues to be used throughout the industry to support platforms and power clients such as 49th Shelf, eBOUND’s Digital Dashboard, Access Copyright, wholesalers, retailers, and more. Meanwhile, our custom exports for the industry continue to fill a vital gap.

For F2019, we will continue to promote and grow our sample and excerpts service to end users. We also look forward to revisiting the structure of our BiblioShare database to greatly improve its performance and scalability.

Bibliographic Data Distribution

In F2018, our distribution of bibliographic data from BiblioShare grew tremendously. Through our Web Services, we received more than 7 million cover image requests, 6.6 million full ONIX requests, and 8.3 million BiblioSimple requests. In total, we saw 91 million requests for data, which is triple those received in F2017. With users making so many service requests, we are saving publishers a lot of phone calls!

To grow our services this year, we added a service that returns a list of all the assets BiblioShare has received for an ISBN, which can include an ONIX 2.1 or 3.0 record, position data, images, and/or samples. We also added metafield support to our Bookstore Builder Shopify app, which allows an online bookseller to store additional information for products, collections, orders, blogs, pages, and more so that they have greater flexibility in their Shopify stores and, of course, more complete data means better SEO.

Webform

Webform saw a feature release at the end of F2018 that greatly enhances its functionality. It now has better support for subjects, including the ability to add multiple subjects and full support for Thema, and the workflow was also improved with the ability to display if and when a user's titles have been uploaded to BiblioShare. This should make workflows much easier and clearer for those getting titles into BiblioShare.

Our user base grew modestly in F2018 to 51 active publishers holding steady at 31 renewals. A relatively high turnover of accounts is expected with micro-publishers and self-published authors, but among the 22 new accounts was a major art book distributor, an established Indigenous children's publisher, and a specialty publisher, none of whom had previously supported ONIX. We also developed Webform as a training tool this year, creating six student demo accounts with limited BiblioShare access, which will make CataList training possible for those entering the industry and better integrate these components of metadata.

CataList

CataList saw significant growth in F2018 with 580 new registered users. In total, the system now has more than 400,000 title listings, up from 335,000 the previous year, and more than 2,200 galley requests were made, either through the NetGalley integration or directly to publishers.

We made numerous improvements to functionality in CataList this year to help people find what they need, share information more easily, and improve integration between industry tools. To better surface essential information, we added a way for users to filter by their favourite publishers, the ability to search by multiple ISBNs, and the addition of 8-week sales totals throughout the site via the system's integration with SalesData. To improve support for users sharing information with each other in CataList, we enhanced the Notes functionality, created contact distribution lists, added the ability to automatically share notes with catalogue recipients, and improved the way sales reps and others can add or highlight comparable titles. We were also excited to launch our oft-requested integration with the WordStock point-of-sale system, to make it easier for users exporting orders from CataList.

Coming up in F2019, we plan to improve our drop-in management tools and rework the PDF catalogue functionality in response to user feedback.

EDI

It was an interesting year for EDI in Canada last year as the Canadian service provider, Pubnet, was sold twice - from Nielsen Book to The NPD Group to MVB US. Pubnet Canada services remained the same through these transitions and much of the same team is now running Pubnet Canada for MVB. Over the last year, we

saw significant growth in the use of the Advanced Shipment Notice (856) between suppliers and retailers, which allows for more efficient receiving at retailers. BNCstaff also made many updates to the BookNet Canada EDI Directory, and added 16 new retailers to Pubnet Canada.

In F2019, as part of the new ownership Pubnet Canada will transition to a new network and launch new versions of DCTS (Document Tracking Service) and web-based EDI via POW (Publisher Order Wizard). In addition to these improvements, there will be others that will aid in getting the most out of the Pubnet Canada electronic ordering network.

Loan Stars

Loan Stars' second year was a big one, with the hiring of a new project manager on the BookNet team who will, in part, focus on growing the readers' advisory program, and the launch of a greatly improved website with better search functionality, improved archiving of past lists, and more resources for libraries and publishers looking to get involved. Across all our communication channels, engagement was up, with 26 to 30% more followers on social media and our mailing list. On CataList, where all ARC requests and voting takes place, 224 new library users have come on board this year.

Coming up in F2019, we will be looking at launching a second Juvenile list, comprising picture books, middle grade fiction and non-fiction, and young adult fiction and non-fiction, as we grow our outreach efforts to libraries across Canada.

SalesData

In F2018, SalesData saw the number of reports run increase from 307,412 to 341,707, the user base grow from 1,727 to 1,960 users, and weekly saved/scheduled reports almost double from 372 to 739. Along with this growth, the SalesData team rolled out a few new features in response to feedback from our core users. Among these, a new Single ISBN Multi-Market Report was added and we created a new Independents aggregate market so that users and the BookNet research team can better analyze this particular segment of the market.

The team followed through on the focuses outlined in last year's Year in Review report, namely retailer recruitment and working with library system to obtain circulation data. In F2018, 17 new retailers joined the panel, up from 12 additions in F2017. For the library data project, the team has been busy collecting and testing sample reports from beta libraries, including TRAC/Marigold and Hamilton Public Library, as we work towards launching this system in F2019.

In the coming year, SalesData's focuses will be to add report improvements and functionality to help make reporting even more efficient and intuitive, including new and improved Multi-ISBN searchable criteria options, integrations with BNC CataList, and further abilities to customize and refine report results.

Standards & Certification

ONIX for Books: We continued to encourage the move to ONIX 3.0 in F2018, with a live webinar on major updates in bibliographic standards, several blog posts published, and ongoing one-on-one support and bibliographic reviews conducted with publishers. Looking at the data in BiblioShare at year-end, we can see a 50% increase in the number of 3.0 records being submitted over F2017. There has also been an 8% increase in 2.1 records, both of which are cause for celebration. However, if the number of ISBNs in the two versions is compared, it should be noted that 3.0 still represents only 7% of our 2.1 data.

Across the industry, we are continuing to see movement in the shift to ONIX 3.0. For one, 3.0 is fully accepted in the digital supply chain by retailers who accept ONIX. A number of Canadian publishers now support both versions of ONIX according to physical vs. digital product metadata.

Bibliographic reviews: In addition to the ongoing automated quality reports issued on every incoming ONIX file to BiblioShare, we conducted in-depth reviews of metadata and overall metadata practices at eight Canadian companies in F2018. These reviews allow us to assess subtler issues than can be handled by the reports, such as HTML or encoding issues and, most importantly, they provide feedback to BNC on developing issues.

Subjects: Keywords is the hot topic in standards but Amazon is the only retailer known to apply them, leaving subject and audience classification as the industry's bulwark. BISAC subjects continue to dominate North America and are common in the rest of the world but Thema use is increasing rapidly in Europe and other countries that use ONIX. Two thirds of BiblioShare's Thema data comes from offshore, but that reflects overall data volumes. Thema is being used by Canadian publishers with virtually all ACP/LPG publishers supplying it with the support of all major data distributors. There remains no known use by North American retailers yet, but there is stated interest. We continue to recommend Canadian publishers that they develop their support for Thema and look forward to working with retailers to hone its usability.

Committees and working groups: A reconstituted Thema Working Group was formed in the spring of 2017 under an industry chair and is developing recommendations for Gender Identity classification. BNC and members of this group are participating with the CFLA's Indigenous Matters Committee. This group is looking to implement policies for libraries and archives based on the recommendations of the full Truth and Reconciliation Committee of Canada. A sub-group within that larger project is looking at subject classification and we are participating with a Publisher Working Group to develop appropriate classifications for these needs. A forthcoming Thema proposal will be based on these results. BNC staff remain active in the BISG through its major committees and board. Internationally, BNC continues to serve on the steering committees for ONIX and Thema.

Education & Research

Education

BNC took advantage of its new offices in F2018 with a two-day ONIX training course in May, led by EDItEUR's Graham Bell, which sold out and was well received by participants. Outside the office, we continued to educate those entering the industry with higher education intensives on data, metadata, and a presence at SFU's Emerging Leaders program, along with other initiatives that altogether reached almost 700 industry professionals and students.

We had our biggest Tech Forum & ebookcraft conference ever, with Tech Forum exceeding capacity, the event's hashtag trending Canada-wide during the day, and favourable attention in the media covering our diversity and inclusion focuses this year. We were also able to triple our views of conference videos in F2018 by moving them to our new YouTube channel.

In terms of other online efforts, our podcast continues to grow. In F2018, we more than doubled our average number of plays per episode as we continue to release new episodes every month. On our blog, unique page views were up 47% over the previous year, and our new TinyLetter for booksellers, Let's Sell Some Books, now has a 58% open rate and 15% click rate with almost 100 subscribers after just five emails sent out.

We also took our retailer outreach offline this year, with a Canada 150 promotion that included a very well received poster of the 150 top-selling Canadian titles of the last 10 years printed and mailed out to indie retailers across the country.

In the coming year, we will be celebrating the 10-year anniversary of our PubFight publishing fantasy league, strengthening our basic education around core BNC services, developing email strategies with a focus on improving engagement and retention with our existing product users, and increasing our presence in the industry both at events and by partnering with other organizations on projects like podcasts or webinars.

Research

This year, our research team made some major improvements to our quarterly book-buying survey, which is the basis of many of our consumer studies. The panel for the new survey was expanded from 400 to 750 respondents each quarter as part of our ongoing efforts to enhance the breadth and depth of our research. We are also continuing to add more specific questions as trends in the industry evolve, for example, on podcast listening and book club participation.

We completed our Deep Dive series of genre studies this year, with eight instalments covering subjects from Science Fiction to History. Our other research focus for the year was on literary awards, with a blog series covering sales trends for major Canadian literary prizes and six award studies produced for publishers shortlisted for those awards, which were also made available for SalesData subscribers. In addition to one public study released in F2018, *Canadian Reading Canadians 2017*, which was an update to our 2012 study in honour of Canada 150, we had a solid year for publicly available research with more than 5,500 reads of these reports.

At the beginning of F2019, we will be releasing our fifth edition of *The State of Digital Publishing in Canada*, with an updated audiobook study also on the way. We will also be looking at ways to measure the impact of popular online platforms on discoverability.

Board of Directors

The BookNet Canada Board of Directors is comprised of a cross-section of representatives from firms across the publishing supply chain and the industry's professional associations.

CHAIR

Moe Hosseini-Ara
Director, Branch Operations &
Customer Experience,
Toronto Public Library

VICE-CHAIR

Chris Szego
Manager, Bakka-Phoenix Books
Retail Council of Canada

SECRETARY-TREASURER

Hamish Cameron
VP Distribution & Management Information
Systems, UTP Distribution
Association of Canadian Publishers

DIRECTORS

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Chief Operating Officer,
Penguin Random House Canada
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Robin Hoogwerf
General Manager, United Library Services
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Barbara Howson
VP Sales & Licensing, House of Anansi Press
Association of Canadian Publishers

Mike Hurley
VP Proprietary Products & Print Finance,
Indigo Books

David Millar
VP, Sales and Marketing, Simon & Schuster Canada
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Jessica Walker
Manager, Munro's Books
Retail Council of Canada

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Association of Canadian Publishers

Shannon Smith
Membership Representative,
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Indigo Books & Music Inc.

Jefferson Gilbert
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David Swail
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Bill Holt
Database Administrator & Technical Lead

Elizabeth Barker
Project Coordinator

Tim Middleton
Project Manager & Retailer Liaison

Ben Farrall
Software Developer

Pamela Millar
Director of Customer Relations

Mickey Fontana
Financial Administrator

Monique Mongeon
Project Manager

Jackie Fry
Director of Product Development

Tom Richardson
Bibliographic Manager

Noah Genner
President & CEO

Ainsley Sparkes
Marketing Associate

Tom Gerrard
Software Engineer

Lauren Stewart
Conventions & Operations Manager

Carol Gordon
Project Manager

Andy Thomas
UI/Web Developer

Kira Harkonen
Marketing Associate (interim)

In February 2017, Canada FBM2020 was established by ACP and l'Association nationale des éditeurs de livres (ANEL) to manage, on behalf of the Canadian book industry the Canada as Guest of Honour (GoH) program at the 2020 Frankfurt Book Fair. With the financial support from the Department of Canadian Heritage (PCH), and with the oversight of an independent board of directors from the publishing, cultural and creative industries, the organization will deliver major components of the GoH program. Livres Canada Books (LCB) is also an important partner and will provide administrative support to the entity.

Key areas of activity for Canada FBM2020 over the 2017–18 fiscal year include:

A. Stakeholder relations:

- Liaising with Canadian Heritage's Frankfurt 2020 Secretariat, the Canada Council for the Arts, and the Government of Canada's steering committee for 2020
- Liaising with the Frankfurt Book Fair
- Continued consultation with the Canadian book industry, including presentations to ACP, ANEL, LPG, ACUP, REFC and regional associations and affiliates

B. Outreach to German publishers:

- Hosting a networking reception for German and Canadian publishers at the 2017 Frankfurt Book Fair
- Working in partnership with IFOA and Québec Éditions to host German publishers in Canada as part of their respective international fellowship programs
- In collaboration with eBOUND, facilitating a trade mission of German ebook distributors to Toronto

C. Marketing and promotion:

- Development of *Reading Canada / Lire le Canada / Lektüre Kanada* a print promotional piece, which was distributed first in Frankfurt and also to key contacts and potential partners. A companion website www.readingcanada.ca, was also developed and launched
- Development and launch of an online catalogue hosted by www.canadafbm2020.com to promote Canadian books to German publishers
- Initiating a branding exercise to develop a brand for the GoH project

D. Professional development and capacity building:

- Programming of "Roadmap to 2020: Building Your Rights Business," a day-long professional development session supported by OMDC
- Facilitating consultation sessions between Maria Antas, German publishing consultant, and publishers across the country

Many of the activities outlined above will continue through 2018–19. Highlights of the coming year will include:

- In partnership with Livres Canada Books, coordination of a trade mission to Germany in July 2018. A group of 25 publishers who reflect the diversity of the Canadian book industry have been selected to participate.
- In partnership with the Toronto Comic Arts Festival and Canadian Embassy in Berlin, participation at the International en Comic-Salon in Erlangen, Germany's biggest graphic novel festival
- Increased promotion of the online catalogue, in tandem with the Canada Council's Frankfurt 2020 translation program.

Another important activity of the past year was to populate the remaining seats on the Canada FBM2020 board of directors. Thanks to the work of the organization's nominating committee, we have assembled a board that reflects a range of experience and expertise.

FBM2020 Board of Directors:

President	Caroline Fortin Directrice générale, Québec Amérique (unaffiliated publisher rep)
Treasurer	Matt Williams VP Operations, House of Anansi/Groundwood Books (ACP rep)
Secretary	Nicole Saint-Jean Présidente, Guy Saint-Jean Éditeur (ANEL rep)
Directors	Kate Edwards Executive Director, ACP (ACP rep) Richard Prieur Directeur général, ANEL (ANEL rep) Rob Sanders Publisher, Greystone Books (ACP rep) Arnaud Foulon Vice-président, éditions et opérations, Groupe HMH (ANEL rep) Christine Frederick Artistic Director, Alberta Aboriginal Performing Arts (industry rep) Bernard Gilbert CEO, théâtre Diamant (industry rep) Natasha Kanapé Fontaine poet/comedian/artist (industry rep) Serge Samson Investment Programs and Member Training Manager, Music Nova Scotia (industry rep)
Observer	François Charette Executive Director, Livres Canada Books

We acknowledge the hard work of the Canada FBM2020 staff, Executive Director Gillian Fizet and Project Coordinator Isabelle Gauvin, who have advanced the objectives of this once-in-a-lifetime project with skill, diplomacy and good humour over the past year. We also welcome Meghan MacDonald, who has recently joined the organization as Operations Manager. On behalf of ACP members, thank you.

Submitted by,

Kate Edwards, Rob Sanders & Matt Williams
ACP representatives to Canada FBM2020

In the last year, our delegate, Glenn Rollans, attended two meetings of the World Intellectual Property Organization (WIPO) Standing Committee on Copyright and Related Rights (SCCR) in Geneva. These meetings are important for our corporate purpose as they are the clearing house for copyright concerns from 178 countries around the world. We have had observer status at these meetings for the last five years.

Well attended by the library and educational community, these meetings have, in our view, been presented in the past with a skewed vision of Canada's copyright landscape. In this alternative copyright universe, changes to Canada's copyright laws have been a resounding success.

Those of us in the creative community know this is not the case, and CCI has been lobbying attendees at these important meetings to tell the creators' side of the story. This attendance has, we think, been effective—our presence has been noted by the government officials responsible for copyright in Canada, and we have met with attendees on several occasions.

In addition to our important WIPO work, we were able to arrange, under the auspices of McCarthy Tétrault, and with the help of the ACP, a copyright seminar designed for the creative community. This is the second of such sessions, was well attended, and we hope to make it an annual event.

In May, our Chair provided testimony to the Federal Government Industry Committee charged with reviewing the changes to Canada's Copyright Act which were promulgated in 2012.

Respectfully submitted,

Bill Harnum
Chair



BACKGROUND:

The renamed Coalition for Diversity of Cultural Expressions (CDCE) is a national organization to which the ACP belongs. Its aim is to be proactive and effective on cultural policy with a focus on international trade of goods and services in culture, and for the ACP, as it pertains to book publishing. The CDCE encompasses a diverse work force of over 250,000 cultural workers in 28 organizations in French and English from across Canada.

In July 2017 following the announcement of the renegotiation and modernization of the North American Free Trade Agreement (NAFTA), the ACP issued a press release on its position ("ACP releases submission on NAFTA and Canadian book publishing") calling for "...maintenance of NAFTA's cultural exception, a renewed commitment to Canadian ownership of cultural industries, and stronger protections for copyright and intellectual property." That siren call to reassemble forces was echoed by CDCE members to ensure culture is kept out of international trade agreements, to promote and protect the diversity of cultural expression.

I stepped down in 2017 as co-chair after six years but was asked to stay on the executive committee, which is comprised of the two current co-chairs, a treasurer and two ex-officials named from the wider membership. Since then, numerous rounds of NAFTA talks have been held in cities in the three countries, with considerable time and attention spent to discuss and plan strategy. Conference calls with officials at GAC have taken place, most wide in scope and only a few specific to culture, attesting to the general lack of progress with the NAFTA which is well reported by the media. How the cultural exception will be protected is still undetermined but negotiators are aware of the CDCE's position, which the ACP fully supports.

Still on trade agreements, the Trans Pacific Partnership signed late in the Harper government to give Canada greater access to key Asian markets with ten other countries had not been formally ratified when the U.S. pulled out entirely after the Trump election. This provided an opportunity for Canada to re-negotiate a better deal, particularly for culture, in late 2017.

In January of 2018, Canada's Minister of International Trade, François-Philippe Champagne, announced an agreement with the renamed Comprehensive and Progressive Trans Pacific Partnership (CPTPP) with binding side letters with each of the ten country signatories with Canada to protect and promote culture. The CPTPP is now the third-largest and most important trade agreement after the NAFTA and the CETA, another trade agreement where the Coalition was heavily involved and consulted throughout. The CDCE was given advance notice of the broad strokes and reassured personally by Minister Joly that culture would be protected.

For those interested in learning more about the CPTPP, please visit the GAC site: <https://international.gc.ca/trade-commerce/trade-agreements-accords-commerciaux/agr-acc/cptpp-ptpgp/index.aspx?lang=eng>.

While the acronyms and the discussion about these agreements may not be on the top of mind to ACP members, it is evident our ability to collaborate with bureaucrats who are equally committed to protecting and promoting the English-language publishing sector, among others, has proven effective, even if culture and its pressing issues are given little attention by the national media. The ACP's involvement at these levels has been viewed as important, thoughtful, and contributing to the best interests of Canada's cultural industries. Our strength is as wordsmiths, and when called upon, our collective force can be formidable.

The secretariat received a strong vote of support from Minister Joly's office with a \$100,000 contribution to the International Federation of Coalitions of Cultural Diversity which is housed within the Montreal office.

In the process of this important recognition, it was decided that it was time for the name to evolve. The CCD

Coalition for the Diversity of Cultural Expression

became the 'Coalition for the Diversity of Cultural Expressions' (CDCE), with a new logo, and web site to be launched shortly.

In mid-April a Joint Declaration on Cultural Diversity and the Digital Space made in Paris by P.M. Justin Trudeau and French President Emmanuel Macron announcing a new cultural initiative aimed at promoting cultural expression, diversity and the French language in the digital space. This initiative will also enable the two countries to enhance their collaboration within the United Nations Educational, Scientific and Cultural Organization (UNESCO). The CDCE is hopeful this public statement will provide strength to the mission of protection and promotion of Canada's diversity of cultural expressions.

This has been a very busy year as an executive committee member with many, lengthy conference call meetings as well as considerable time spent working as an operating board, not just as a policy board, with staffing issues and an office move. A quieter year is anticipated and welcomed.

UPCOMING EVENTS:

June 5 & 6

Half-day events in Montreal & Toronto with focus on the CRTC's report on future programming distribution models, and an update on the study commissioned on the State of the Diversity of Canadian Cultural Expressions Online. This conflicts unfortunately with the AGM.

September TBC

Two+ day-long conference in Ottawa with an overview on positive actions lawfully taken by experts and parliamentarians to enforce and implement cultural policies in the digital era, followed by the AGM, and a day focused on the International Federation. Program details to follow.

My sincere thanks to the membership for the opportunity to continue as your representative at meetings and on the executive committee. This is an honour and privilege. My personal thanks to Kate Edwards for her tremendous support in this endeavour.

Respectfully submitted,

Catherine Mitchell
ACP Representative
mitchellcatherine@rogers.com



Support to Publishers

Eighty-five percent (85%) of Canada Book Fund's contribution to Livres Canada Books was used in support of Canadian publishers through market intelligence, professional development, and two funding programs: the Foreign Rights Marketing Assistance Program (FRMAP) and the Mentoring Program.

Programs

FRMAP

Livres Canada Books received a total of 162 applications. In 2017–2018, there were 160 eligible applicants (85 English-language publishers and 75 French-language publishers), compared to 152 eligible applicants in 2016–2017. A total of \$780,000 was disbursed to eligible recipients participating in international trade events or undertaking export sales trips.

To date, 169 applications for 2018–2019 have been received.

Mentoring - Funding Support

Livres Canada Books received a total of four applications. All applicants were eligible (same number in 2016–2017). A total of \$8,000 is expected to be disbursed to eligible publishers in 2017–2018.

Market Intelligence and Professional Development

Digital Publishing

Livres Canada Books published a report in English and French on the very timely subject, *The Global Audiobook Market*. We also offered a webinar on the same topic.

The audiobook market is an area of publishing that is witnessing unprecedented growth. Written by Forte Business Consulting's Michele Cobb and Michael Desrosiers, this new report provides concrete information for Canadian publishers who seek to take advantage of the evolving audio culture.

The report is available in English and French in PDF format and in MOBI and EPUB versions at a cost of \$30 on our website. The guide is offered for free to eligible Livres Canada Books funding recipients under the FRMAP or Mentoring programs.

In 2018–2019, Livres Canada Books will publish an expanded update of the report, *Global Ebook Markets*, entitled *Global Ebook Markets and Pricing*. The global ebook market has shifted significantly since Livres Canada Books published its first report on this topic in 2013. The new report will be available in English and French and will provide publishers with updated information and profiles on important and emerging ebook markets around the world. Building on the latest industry developments, the report will also address the topic of ebook pricing across various markets. The challenge of international ebook pricing is a significant grey area for many publishers. It is a topic that is addressed time and again at publishing conferences around the world, and one of growing international relevance. In this report, Livres Canada Books will offer Canadian publishers some much needed guidance, providing them with the tools they require to navigate the challenges of contemporary ebook practices. A webinar will be presented on the same topic.

Market Guides

Livres Canada Books produced two new market guides and two updated guides:

Livres Canada Books

1. *Selling Canadian Books in India* (new)
2. *Exporting Scholarly and Academic Books: A Guide for French-Language Canadian Publishers* (new)
3. *Selling Canadian Books in Australia* (update)
4. *Selling Canadian Books in the UK* (update)

Note that the update to the UK guide was an initiative of the High Commission of Canada in London.

In 2018–2019, Livres Canada Books will publish a new market guide and update two previously published guides:

1. *Vendre aux grandes surfaces et hors réseau traditionnel en France* (new)
2. *Selling to Mass Merchandizers and Non-Traditional Accounts in the US* (update)
3. *Le marché du livre de langue française aux États-Unis* (update)

Our market guides are available in PDF, MOBI and EPUB versions on the Livres Canada Books website at a cost of \$30 each or for free to eligible Livres Canada Books funding recipients under the FRMAP or Mentoring program.

Professional Development Webinars

Michele Cobb presented an excellent 90-minute webinar, *The Global Audiobook Market: A Unique Export Opportunity*.

This practical, hands-on webinar was designed to provide publishers with knowledge on the major components and latest trends of the global audiobook market to help them succeed in this growing field. Attendance was opened to publishers, rights managers, and exporters of all professional levels interested in hearing from a highly-regarded audiobook expert and gain insight into how to make the most the opportunities available in dynamic and accessible format.

The webinar was presented in English and a French translation of the PowerPoint presentation was sent to every Francophone participant in advance of the webinar.

In total, 31 people attended the webinar. The registration cost was \$50 per participant. A recording of the webinar, minus the question period, is available for streaming free of charge on our website. The PDF presentations are also available for download.

In 2018–2019 Livres Canada Books will hold a webinar entitled *Global Ebook Markets and Pricing*, in conjunction with an expanded update of the report on the same subject.

Export Market Webinar

Livres Canada Books held three Export Market webinars highlighting the Guest of Honour country at the Frankfurt Book Fair and at the London Book Fair and for the Mentoring program to Germany:

1. Bilingual webinar on the French market (June 14 and 15, 2018)
2. Webinar on the German market (25 July 2018)
3. Webinar on Latvia (28 February 2019)

The webinars were attended by a total of 120 participants. Please note that in 2017–2018 the Export Market webinars were offered free of charge.

Recordings, minus the question period, are available for streaming free of charge on our website. PDF versions of the presentations are also available for download.

In 2018–2019, the first Export Market webinar will highlight the Guest of Honour country at the Frankfurt Book Fair (Georgia). Since we have previously held a webinar on Indonesia (next year's market focus at the London Book Fair), we will hold a webinar on the Japanese book market in January 2019.

Trade Mission to Shanghai

Kaela Cadieux (Annick Press), Meizhen Dang (CD Canada Education Publishing), Barbara Creary (Dominique et compagnie), Margaret Bryant (Dundurn), Adrienne Tang (Kids Can Press), Andrew Wooldridge (Orca Book Publishers), Gabrielle Gilbert-Hamel (Perro Éditeur), Margie Wolfe (Second Story Press), and Warren Rylands (Weigl Education Publishers) and I went to China and attended the Shanghai International Children's Book Fair from November 13 to 17, 2017. Our objective was to meet with key players in the children's book industry in China.

The delegation shared its experiences in a webinar conference on 16 January 2018, and Livres Canada Books published a report in English and French in PDF format on the potential for Canadian publishers in this market.

Trade Mission to Germany

Livres Canada Books and Canada FBM2020 will be in Berlin and Munich from July 9 to 13, 2018 to conduct a Trade Mission on the German book market. An impressive delegation of 23 publishing houses and two rights agencies will participate, including Biblioasis, Book*hug, Caitlin Press, Coach House Books, Comme des géants, Cooke Agency International, ECW Press, Éditions de la Pastèque, Éditions Hurtubise, Éditions les malins, Éditions Québec Amérique, Fernwood Publishing, Great Plains Publications, Groupe Homme, Invisible Publishing, Kids Can Press, Leméac Éditeur, Lux Éditeur, Nimbus Publishing, Orca Book Publishers, Rocky Mountain Books, Second Story Press, University of British Columbia Press, University of Toronto Press and Westwood Creative Artists. Gillian Fizet and I will accompany them to meet with key industry players and gain a better understanding of the book market in Germany.

The delegation to Germany will produce a detailed report of this market's potential for Canadian publishers' rights and distribution sales. The delegation will also make recommendations regarding how Canadian publishers can best connect with business partners in this market. The information and experiences garnered on the mission will be shared by the delegates through a webinar aimed at publishers who were unable to participate in the mission.

Mentoring - Coaching - Germany

The objective of the Mentoring Program - Germany is to provide a group of eligible publishers export expertise to help them familiarize themselves with export activities in Germany (examination and evaluation of their export potential, promotional activities, distribution mechanisms, co-editions and rights sales). The 2017 Program activities included a webinar on: an overview of German publishing, the sale of rights, and distribution in the German market on July 25 as well as a Skype session with a consultant based on areas of publishing (children's books, trade and scholarly publishing) to determine the eligible publisher's potential in the German market.

We are pleased to announce that we had 22 participants (13 for trade, six for children's and three for scholarly). The webinar was also open to all those who wanted to attend.

We will provide another Mentoring Program session on Germany in 2018–2019. The guidelines were published in May.

Livres Canada Books Blog and Social Media

Livres Canada Books continues to post regular blog updates on subjects related to export markets, as well as reports on conferences and professional development events attended by staff. We are extremely satisfied with the results of our blog (74 blog posts in English and in French), our guest blog post for Export Development Canada, and social media activities.

Our social media strategy continues to promote titles submitted by publishers for our catalogues and database, as well as our own publications, blog posts, and events. We are also using social media platforms to share publisher success stories and partner activities.

International Trade Fairs

Livres Canada Books offered administrative, logistical and promotional support on the Canada Stand.

The following was provided at each fair: *Rights Canada* catalogues, *Canadian Studies Collection*, Livres Canada Books' fair directory, Internet access, a consolidated shipping option, and book storage in Bologna and Frankfurt.

London Book Fair 2017

13 exhibitors, two pied-à-terre, and five titles displayed through the pay-per-title option. The Canada Stand occupied a 55 m² space and was full with 15 exhibiting publishers. The Canada Stand hosted successful business meetings and welcomed higher traffic along its aisles.

Once again, the High Commission of Canada to the United Kingdom hosted a reception for the Canadian participants at the Fair on April 13. On April 14, with the sponsorship of OMDC, the Canada Stand welcomed exhibitors and their guests to a networking reception. The High Commission of Canada to the United Kingdom and the Québec Bureau in London offered 700 bags for distribution to visitors at the Canada Stand.

Frankfurt Book Fair 2017

39 exhibitors, six pied-à-terre. The Canada Stand occupied a 272 m² space stand and hosted 45 publishers. The Canada Stand was located in Hall 6.0. Following comments by publishers during the Fair and in the post-Fair survey, we have contacted organizers to request a more central location for 2018. We are awaiting their reply.

In collaboration with the OMDC and the Canadian Embassy in Germany, Livres Canada Books once again hosted a networking reception on the opening day of the Fair, Wednesday, October 11.

Bologna Children's Book Fair 2018

17 exhibitors, four pied-à-terre. For the second time, Livres Canada Books and Québec Édition hosted a successful joint stand. The Canada Stand occupied an 80 m² space with 21 exhibiting publishers and was located in Hall 22 instead of Hall 29. The design was bright and refreshing.

London Book Fair 2018

10 exhibitors, four pied-à-terre, and five titles displayed through the pay-per-title option. The Canada Stand occupied a 55 m² space and was full with 14 exhibiting publishers.

The Canadian High Commission in London organized meetings between Canadian and British participants, as well as a reception on April 9 for Canadian exhibitors. They also provided funding support for updating our U.K. market guide and provided 750 book bags for visitors to the Canada Stand. On April 10, the OMDC sponsored a networking reception on the Canada Stand for exhibitors and their guests.

2018 New York Rights Fair

10 exhibitors and one pied-à-terre. Livres Canada Books reserved a 36 m² space to try out this new fair. At the time of writing, a total of 11 exhibitors have registered out of a possible 16.

2018 Frankfurt Book Fair

At the time of writing, we have 41 exhibitors and seven pied-à-terre. The Canada Stand will measure 272 m² and will host 48 publishers and printers.

Following comments made by publishers during the fair and a survey conducted afterwards, we contacted the organizers to request a more central location for 2018. We are still awaiting our final location. We expect to organize our joint networking reception with FBM2020 on October 10.

Promotion

The New Rights Canada Catalogue

Livres Canada Books signed an agreement with IPR License, found at <https://iprlicense.com/>, to produce the Rights Canada catalogue and further promote Canadian publishers on their platform, which allows its customers to buy and sell rights online. Since IPR was launched, rights listings have been viewed in 201 countries across 168 languages.

We are very pleased to announce that we have registered 286 titles and four paid ads from 104 publishers (90 titles and seven ads from 52 publishers in 2016–2017). This is an increase of 315% in titles and 200% in publishers represented.

The 48-page colour catalogue was produced by IPR. They created a PDF (for digital distribution and for the Livres Canada Books website, found at <https://livrescanadabooks.com/en/catalogues/rights-canada/>) that contained links to the publishers and title pages on IPR for every listed title. IPR printed 500 copies for distribution during the year.

Each publisher who provided titles for the *Rights Canada* catalogue also received an IPR account under the Livres Canada Books umbrella. IPR offered two introductory webinars to participating publishers on how to use the IPR platform.

Livres Canada Books offered free ads to ACP, ANEL, CAC, and Frankfurt 2020. The invitation for the 2018–2019 edition was sent in May.

Canadian Studies Collection 2018

The 2018 edition of the *Canadian Studies Collection* lists 77 titles and six full-page ads from 29 publishers. Distribution of the 2018 *Collection* is underway with 2,000 print copies being distributed to or reserved for Canadian Studies events abroad.

An interactive PDF version of the *Collection* is available on our website at <https://livrescanadabooks.com/en/catalogues/canadian-studies/>, and the titles in the *Collection* are included in our online database at <https://livrescanadabooks.com/en/canadian-books/find-a-canadian-book-or-author/>. Titles are also promoted through Facebook, Twitter, and our homepage sliders.

This year, we provided participating publishers with individual sell sheets in PDF format for each title included the catalogue, free of charge. The sell sheets echoed the sophisticated look of the *Collection* and included the cover image, book descriptions and/or review quotes, and bibliographic information. Participating publishers received digital copies of their respective sheets for distribution at their convenience.

Frankfurt Book Fair 2020

Livres Canada Books is supporting Canada FBM2020 over the course of this project. Livres Canada Books will be active in supporting efforts in the following areas: administration, the Canada Stand, the Guest of Honour Pavilion, and other initiatives yet to be determined. Livres Canada Books is leading a Trade Mission to Germany in 2018–2019 with Canada FBM2020. And, as previously mentioned, Livres Canada Books is offering a targeted Mentoring-Coaching program on Germany for a second year.

Livres Canada Books will also support Frankfurt 2020 by increasing the FRMAP budget to allow more publishers to travel for business and attend Frankfurt in advance of 2020.

Norwegian Event

The Norwegian Embassy in Canada organized an event in collaboration with NORLA and Livres Canada Books during the Blue Metropolis Festival in Montréal on April 26. Given that Norway will be the Guest of Honour country at Frankfurt in 2019 and Canada in 2020, it was the perfect time for such an event. Some thirty participants attended. The Norwegian Ambassador opened the evening; NORLA gave a presentation, followed by three Norwegian authors and remarks from Livres Canada Books. A fine event!

Livres Canada Books News Bulletin

Livres Canada Books publishes a monthly email newsletter promoting its activities, services, and programs. We have had several new subscribers over the course of the year.

Livres Canada Books Website

We have migrated our website from ExpressionEngine to WordPress. We are currently updating our database for better searchability and accuracy in both English and French.

Submitted by,

François Charette
Executive Director

Summary report prepared for Semareh Al-Hillal, Anglophone publishers' representative to the PLR Commission, for inclusion in the Association of Canadian Publishers AGM briefing.

Highlights from 2017–18:

2016 Author Payment Budget: (February 2018 mailing):	\$9,765,635.23
Max. author payment:	\$3,552.50
Max. book payment:	\$355.25
# titles registered:	101,477
# titles found:	87,083
Minimum author payment:	\$50.00
Average author payment:	\$556.00
Median author payment:	\$253.80
# of authors receiving payment:	17,553

Board and Staff:

Commission Chair (2016–2018)	Daniel Poliquin
Commission Vice-Chair	Genni Gunn
Canada Council (ex officio) representative to the Commission	vacant as of May 2018
PLR Program Manager and Executive Secretary	Peter Schneider.

Program Developments:

The PLR Program is the intended direct recipient of a cumulative total of \$5M in new permanent core funding, slated to be phased in over two years starting in fiscal 2018–19. The new investment in the PLR Program is the largest in its 32 year history and is closely aligned with the Canada Council's current strategic plan.

The membership of the PLR Commission has endorsed a suite of significant reforms which will have a major impact on the future of the program. The most noteworthy of these changes is the imposition of a formal 25-year cap on the span of active registration and payment for eligible title share claims submitted by creators. This change is intended to provide further sustainability to the program model and to ensure that meaningful compensation is allocated to new titles and new registrants. The new limit will take effect starting with the 2018–19 payment cycle. Communication with stakeholder groups to provide context for the imposition of a payment limit has been ongoing since last year.

Starting in 2019, participants in the program will be able to register eligible work that has been published within five years of the annual registration period. Eligible works discovered in the library catalogue survey will receive the maximum rate of pay for a five-year period following registration, with the rate of payment depreciating over time, up to a maximum of 25 years.

The PLR Commission has recently welcomed several new voting members, including a new Anglophone librarian, Ms. Pilar Martinez, CEO of Edmonton Public Library. New writer-representatives include Mélikah Abdelmoumen (francophone representative) and Laurie D. Graham (Anglophone representative). A new PLR Commission Chair and Vice-Chair will be elected in June 2018.

Public Lending Right Program

A brand-new PLR website launched on 15 February 2018 to coincide with the delivery of author payments and the opening of the annual registration period. The new website, in English and French, is accessible as www.plr.ca and www.dpp.ca. Illustrations for the new site were provided by Toronto-based illustrator, Daniel Rotsztain.

PLR delegates from Canada participated in the 12th PLR International Network Conference, which took place in September 2017 in Paris. A key concern for European PLR models concerns the pending eligibility of electronic works. The possible expansion of European PLR models to to accommodate illustration and photography was another topic of intense discussion during the three-day session.

The PLR Program is at last beginning work towards the introduction of online registration and payment services. It is expected that further details and timelines for the arrival of digital registration and direct deposit of PLR payments will be confirmed by the Canada Council in summer, 2018. PLR continues to send paper registration kits, account updates, and printed cheques to its entire client base. The arrival of electronic workflows will significantly reduce the program's environmental footprint and will assist the core program staff of four persons with handling requests from more than 20,000 active registrants.

Submitted by,

Peter Schneider
Manager and Executive Secretary



AFFILIATE REPORTS

Administration and Grants

AELAQ receives annual funding from the Canada Council for the Arts (core funding and the Roadmap Reading Fund), SODEC (for AELAQ operations as well as production of the mRb), and the Department of Canadian Heritage (Canada Book Fund for AELAQ professional development and the production of the mRb).

In our fall 2016 application to Canadian Heritage, we asked for a significant increase in funding for the *Montreal Review of Books*, and additionally we asked for Heritage's support for the 2017 and 2018 editions of the Holiday Pop-Up Book Fair. I'm happy to say we received notice of the requested increase in July 2017. Please see below for more in-depth reporting on use of the funding.

We continue to receive funding from the Canada Council for the Arts. We applied for the first time under the new funding model and received status quo funding for 2017–2019.

Membership

2017 saw a significant increase to AELAQ membership, with three new members joining. We are pleased to welcome Phoenicia Publishing, Pow Pow Press, and Black Rose Books to AELAQ. These publishers bring a diversity and wealth of experience that we're very happy to see among our membership.

Special Projects

Holiday Pop-Up Book Fair: The second edition of the Book Fair took place in November of 2017. This was the first year we did the fair with the support of funding from the Department of Canadian Heritage Canada Book Fund. The Book Fair was held for the first time in the beautiful and historic Le Café at the Monument National, a wheelchair-accessible ground-floor venue. We were able to employ Elise Moser as Book Fair co-coordinator, as well as engaging a publicist and other professionals. 12 AELAQ publishers tabled, over 60 writers participated, and over 600 people attended. On the second day of the fair we held a reading/live writing event featuring 20 writers, which about 100 people attended.

Roadmap

This special author touring fund is available for writers published by AELAQ publishers that are eligible for Canada Council for the Arts funding (both writer and publisher must be eligible). In 2017–18 the fund was fully spent, a first in our history with it. We have confirmation that AELAQ will receive support for this project for 2018–2019. After that point we will need to reapply to the Canada Council to renew the fund. AELAQ, along with the Quebec Writers' Federation (who administer a similar fund called Quebec Writers Out Loud) have been in discussion with the Canada Council about where and how to apply to renew the fund, as it's not clear where it falls within the new funding model. However, given the federal government's commitment to funding activities serving minority language communities in coming years, we feel confident that the fund will be renewed.

Podcast

This project is the result of surplus funds from the Roadmap funds from 2014–15 and 2015–16. Due to restrictions in who can have access to this funding, not all of the funds were spent in those years, and we were faced with the possibility of having the fund cancelled or decreased for future years if we did not find a way to use the surplus funds. The use of the fund for a podcast featuring writers published by our membership was approved by the Canada Council in 2016, and in 2017 we launched a ten-episode series called *Inside the Frozen Mammoth*, which ran bi-weekly from May to October of 2017. This series featured

writers in conversation about craft, language, and being a writer in Quebec. At this writing, the podcast has been played ~1500 times, with an average of 130 plays per episode. It will remain online until May 2019, after which it will be archived and will be accessible by request.

Professional Development

In mid-January 2017, AEFAQ members met with representatives of iBooks, Apple's online ebook store, for a presentation and Q&A on marketing best practices. Seven people total attended, all AEFAQ member publishers.

On 20 February 2017 AEFAQ hosted a presentation on diversity in the publishing industry by Jael Richardson, artistic director of the Ontario-based Festival of Literary Diversity (FOLD). This presentation was followed by a lively Q&A moderated by Montreal writer and community organizer Malek Yalaoui. It was attended by six AEFAQ member publishers and 16 community members.

Following the 2017 AGM (May 2017), AEFAQ hosted a presentation by Steven Beattie: *Bridging the Solitudes: The Future of Publishing Inside and Outside Quebec*. Bringing the perspective of his experience as review editor at Quill & Quire, Canada's premier periodical on the book industry, Steven Beattie gave a presentation that looked at trends, undercurrents, and tendencies in publishing, with a special focus on Quebec. This presentation was attended by six AEFAQ members and another six community members.

Montreal Review of Books

We said goodbye to outgoing associate editor Sara Spike in May 2017, and were happy to welcome new associate editor Lesley Trites as her replacement. The review continues to be efficiently managed by editor Mélanie Grondin, associate editor Lesley Trites, and publisher Anna Leventhal. In 2017 there were three issues of the mRb: 52 (Spring 2017), 53 (Summer 2017), and 54 (Fall 2017). Submissions for these three issues ranged from 70 books to 100 books per issue, and a total of 82 books were reviewed over those three issues.

The increase in support from DCH/CBF has allowed us to increase mRb activity considerably. We were able to bring the run of the print edition of the mRb back up to 45,000 (it fell below 40,000 in 2016/2017), to move the *Globe and Mail* insert from Friday to Saturday (reaching approximately 10,000 more home subscribers) for 2018, to increase rate of pay for the editor and associate editor, to double the number of books reviewed on the blog (from 12 to 24), and to increase our presence on social media. Issues 54 (our 20 anniversary issue) was 24 pages (rather than the usual 20). We also inserted issue 54 in local arts and culture publication *CULT Mtl* for the first time, alongside our regular inserts in the *Westmount Independent* and *The Suburban* community papers. At mRb online, we hired a developer to improve the site's search function and to add a new feature that recommends related posts at the end of every review.

In fall 2017 we celebrated 20 years of the mRb with a party at the Drawn & Quarterly Bookstore. The event included readings by writers featured in the 20th anniversary edition: Kathleen Winter, Xue Yiwei, and Linda Besner; reflections on the early days of the mRb from longtime editor Kim Bourgeois; a slideshow of 20 years of covers; cake and refreshments. It was attended by about 75 guests.

We continue to focus on our social media presence: the mRb Facebook page has 1120 'likes', up over 100 from last year, and our Twitter account has grown to 2281, up over 200 followers from last year. One ongoing problem is Facebook visibility. Following changes to the platform's mandate in 2013 to a focus on "friends and family", non-profits and arts organizations have noticed that Facebook's algorithm increasingly "hides" their posts from their followers and potential audience unless these organizations pay for sponsored posts. We have noticed a related decrease in views of mRb posts over the past few years. Rather than paying a fee

to “unhide” our posts (which feels a bit like paying a ransom), we hope our membership and the community at large will continue to support the publication by sharing our posts through personal and company accounts. We are also using Twitter more to reach potential audiences, as that platform does not have the same limitations as Facebook.

Information Sharing

Information sharing and networking are central to the AELAQ. We act as a clearing house for requests for information from the public, other associations, writers, and English-language publishers from outside Quebec and francophone publishers.

Respectfully submitted,

Anna Leventhal
Executive Director

Recent discussions about the need for greater accountability, inclusivity, diversity, and representation in our industry have highlighted the growing need for publishers to consider how they both occupy and create space. In my first full year with the ABPBC, I've been proud to work alongside of and on behalf of publishers who are responding to these issues in various ways, and I look forward to continuing this dialogue.

Government and funder relations

A provincial election in 2017 meant a new cabinet and new governmental relationships to navigate, as well as the transfer of responsibilities for Creative BC from the Minister of Jobs, Tourism and Skills Training to the Minister of Tourism, Arts and Culture. The ABPBC welcomed the Province's increased investments in BC Arts Council and Creative BC and the extension of the British Columbia Book Publishing Tax Credit, first in the fall 2017 interim budget, and again in Budget 2018, when it was renewed until 2021.

The BC Arts Council transitioned its Block Grant program for Book Publishers to an Operating Assistance Program, which will offer clients more stable funding and access to an appeals process. Creative BC continued offering travel support for export through its Passport to Markets program, funding for additional BC participation in the Canada FBM2020 and Livres Canada Books Trade Mission to Germany, and a pilot supplement for BC recipients of Livres Canada Books FRMAP funding.

We held the fifth annual BC Book Day at the Legislature on 23 April 2018 (also World Book and Copyright Day), and welcomed an estimated 200 visitors to our display, including Premier John Horgan, cabinet ministers, MLAs from all party caucuses, and their staff. The day continues to be an invaluable opportunity to connect with our elected representatives and showcase the work of our industry.

Marketing and promotions

In 2017, "Read Local BC" became the public-facing brand for the organization, with activities designed to raise awareness of the BC book ecosystem—its authors, publishers, booksellers, and other stakeholders—and engage with readers directly. The campaign includes online content marketing, seasonal events, collective advertising, and promotional materials for booksellers and librarians. In May 2017, we launched www.readlocalbc.ca, which features author interviews, excerpts from newly released titles, publisher event listings, and our BC Bestseller List.

We exhibited at a number of new events, including the Growing Room Feminist Literary Festival, the Native American and Indigenous Studies Conference, and the Provincial Specialist Association Superconference. 2017 marked the final year that a contingent of ABPBC publishers collectively exhibited at the Pacific Northwest Booksellers Association conference as part of a three-year export initiative supported by Western Economic Diversification and Creative BC. We also continued our longstanding marketing projects, including Poetry in Transit, our educational catalogues, and the BC Ferries promotions.

Library outreach

In Spring 2017, we signed a MOU with the BC Library Association to formalize our plans to work closely over the next year. In partnership with the Greater Victoria Public Library, we organized *Check Us Out!*: BC-Published Books in BC Libraries, a pilot session for BC librarians held in Victoria. The event was attended by 40 public, school, and academic librarians, and included publisher displays, networking, giveaways, and a panel discussing how BC books are discovered and promoted in BC libraries.

BC Books Online, a discoverability tool for BC-published titles geared toward librarians and educators that is hosted by 49th Shelf, now features more than 12,000 books and ebooks from 24 BC publishers, making it the largest collection of regionally published works in Canada.

Professional development

Our professional development program offered publishers opportunities to learn about best practices for editing culturally sensitive material, copyright issues, the evolving role of publisher websites, and project management tools, among other topics. We returned to Brew Creek Centre in Whistler for our annual publisher retreat, where we welcomed representatives of the Department of Canadian Heritage, and the Canada Council for the Arts, Canada FBM2020, and the BC Ministry of Tourism, Arts, and Culture.

In February 2018, in partnership with SFU Publishing, Dalhousie University, and Magazines BC, the ABPBC organized Publishing Unbound, a conversation about systemic barriers to accessing Canadian publishing and developing strategies to enact real change. The weekend began with a free, public reading, followed by a group of authors, activists, scholars, and publishing professionals from across Canada engaged in focused dialogue around topics from publishing in the wake of the Truth and Reconciliation Commission, to the cultural and political role of Canadian presses and magazines, to the importance of intergenerational mentorships. Our goal is to produce a set of practical materials, including recommendations and resources, for publishers, authors, activists, and teachers.

Vancouver Literary Arts Centre

The Vancouver Literary Arts Society (VLACS) was incorporated on 23 June 2017, and engaged realtors in its search for a colocation, event, and warehouse space for Vancouver-area publishers. After exploring options, we determined that purchasing a building would offer the most stability for the tenant group and literary community at large, and we now have an accepted offer on a building in East Vancouver. We have a limited window in which to secure the necessary financing and are working to do so through municipal, provincial, and federal cultural infrastructure programs, as well as with private and foundational sponsors.

Membership news

We welcomed a returning member, Hancock House Publishers (Surrey), and Promontory Press (Victoria) moved to the Active membership category.

The Jim Douglas Publisher of the Year Award was presented to Greystone Books and its publisher, Rob Sanders. The Gray Campbell Distinguished Service Award was presented to Betty Keller, founder of the Sunshine Coast Festival of the Written Arts.

In the year ahead, we'll take on new initiatives, including BC's presence at Frankfurt 2020, local audiobook production, a new iteration of the Opening the Book on Film event with the Canadian Media Producers Association, and the beginning of an association rebrand (as much as I enjoy tripping over the ABPBC abbreviation!).

Respectfully submitted,

Heidi Waechtler
Executive Director



Association of Manitoba Book Publishers

The Association of Manitoba Book Publishers continues to work in support of Manitoba's diverse publishing industry through its marketing, outreach, and lobbying activities. Manitoba publishers produce a varied range of books in English, French, and several Aboriginal languages. Many books are by Manitoba writers or tell Manitoba stories. Our members publish about 100 titles annually.

Our members:

We have 14 members in total (12 active and two associate). Our active members are: ARP Books; At Bay Press; Les Éditions du Blé; Fernwood Publishing; Great Plains Publications; J. Gordon Shillingford Publishing; Pemmican Publications; Les Éditions des Plaines; Portage & Main Press; Signature Editions; Turnstone Press; and University of Manitoba Press. Our associate members are Bedside Press and Peanut Butter Press.

Overview of Some Activities:

The AMBP provides current information, ideas, and resources on publishing to our members and the general public. Some recent highlights include our expanded outreach activities and events (including the release of our infographic highlighting the cultural and economic benefits of Manitoba publishing), the one-year renewal of the Book Publishing Tax Credit in Manitoba, expanded trade activities and reinvigorated professional development programming.

We also coordinate joint marketing projects including *Prairie Books NOW*, a widely-distributed publication about Prairie writers, publishers, and stories published two times each year. *PbN* is available free of charge to readers through bookstores, libraries, university campuses, coffeehouses and a variety of other venues across Canada. Individual copies are sent to every school in the Prairies and to every band/reserve in Canada. The publication is also sent to book buyers (including head librarians and bookstore managers), publishers, and others. We actively represent our members' interests and negotiate on their behalf with various government departments and agencies. We have been active re: concerns about Copyright and on other issues.

AMBP Staff:

Michelle Peters Executive Director (ambp@mymts.net)
Karen San Filippo Projects Coordinator (projectsambp@mymts.net)

Long-time Executive Editor Carlene Rummary left *Prairie books NOW* earlier this year. She has been an important part of *PbN* for many years (first as writer, then as editor and, since 2004, as its executive editor). As of writing this report (in late April) our executive committee is:

President	Wayne Antony, Fernwood Publishing	Members-at-Large	Glenn Bergen, University of Manitoba Press
Vice President	Kirsten Phillips, Portage and Main Press		Randal McIlroy, Pemmican Publications
Treasurer	Emmanuelle Rigaud, Les Éditions du Blé		Mel Marginet, Great Plains Publications
			Jamis Paulson, Turnston Press

Respectfully submitted by,

Michelle Peters
Executive Director

Fast on the heels of another highly successful East Bound Conference—which brought together publishers, creators, booksellers, festival organizers, members of the media, and representatives from our public libraries—and following the Atlantic Book Awards gala, which celebrated forty-one shortlisted books by Atlantic Canadians, the APMA is set for an incredibly active summer.

In 2017, the APMA hired the Halifax-based marketing firm Think Marketing to conduct an in-depth marketing survey, collecting both statistical and anecdotal evidence from all of the association's members regarding their promotional needs and practices. The results of this extensive interview process will be utilized to guide the association both in the hiring of specialized marketing personnel, with specific focus on new digital initiatives, and in the establishment of on-the-ground, information-based marketing strategies moving forward. Think is currently interviewing our membership and the results are expected this spring.

With the prospect of hiring a new marketing agent on the horizon, the APMA will also be addressing its organizational structure with a view to stabilizing the association's operational effectiveness in the wake of certain personnel departures and upcoming staffing changes. We've adopted a pragmatic outlook in this regard, awaiting the results of our marketing study to ensure that our organizational structure suits the mandate outlined by the needs of our members.

Ultimately, the summer of 2018 will prove decisive in the continued success of the APMA. By this fall, there will be a faster, stronger, and more tactically efficient Atlantic Publishers Marketing Association, prepared to advertise and advocate on behalf of our members in the new and ever-shifting marketplace, in what seems an increasingly volatile publishing industry.

James Langer
APMA President

The BPAA continued our advocacy campaign for an “Alberta Book Publishers Fund”. There was a small increase to the Alberta Media Fund announced in the 2018 provincial budget, which is the source of funding for the four cultural industries in Alberta. At the time of writing, it is still unclear what impact that funding will have for book publishers.

The inaugural Alberta Book Day took place at the Alberta Legislature Building on Tuesday, May 15. This initiative has been in the works for three years, and we were delighted to see it become a reality.

With hope that the new federal government will reverse or modify the detrimental interpretation of the copyright act, we met with local MPs, MLAs and bureaucrats, and encouraged our members to do the same.

Our other programs and projects included:

Read Alberta eBooks

The BPAA enlisted eBOUND Canada and De Marque to develop a digital platform for the distribution of member published eBooks purchased by Alberta Municipal Affairs to all Alberta libraries. The BPAA also managed the legal and licensing aspects of aggregating the collection.

Phase one of the project brought over 1,100 titles to the collection; phase two added more current titles to bring the total number of eBooks available to over 1,300. The BPAA continues to manage a model for the re-purchase of titles that have reached the circulation cap of 50 lends, as well as adding new titles to the collection as they become available. The collection has been available since February 2017.

Trade Development and Staff Development Pilot Projects

The BPAA successfully piloted two new projects to provide professional development opportunities to publishers and their staff and to subsidize the costs for publishers to attend international book fairs to explore new export markets.

The pilot program was funded by Alberta Culture & Tourism and Alberta Economic Development and Trade. We have received additional funding to continue to offer a member subsidy program for professional and trade development activities. Evaluation of the project shows that it was well received and helped over 50 people to take advantage of professional development and more than 20 export/trade development opportunities resulting in a number of signed deals for export and the sale or licensing of international publishing rights.

e-Audiobooks Conversion Program

With a project grant from the Alberta Media Fund, we entered into a partnership with the Canadian National Institute of the Blind (CNIB) to produce e-audiobooks.

The average production cost for member titles was \$1,566.00 each. This project spanned two years and resulted in 25 e-audiobooks. We are working with De Marque to add these titles to the Read Alberta eBooks collection.

The Writing Stick Conference

“The Writing Stick: Sharing Indigenous Stories” was a conference which took place June 8 to 10, 2017 at the University of Alberta in Edmonton, Alberta. It created an opportunity for participants to look for wisdom and insight while exploring principles and guidelines for publishing and editing materials by Indigenous writers and about Indigenous peoples. The two-day conference offered an intensive learning experience

featuring lectures and presentations, workshops, keynote speakers, film screenings, visual displays, and other cultural elements.

Areas of focus included: editing Indigenous works; cultural protocol and respecting of traditional material; appropriate use of terminology, names, and images; issues of appropriation, stereotyping; and proper recognition of Indigenous works.

Funding was secured from all three levels of government to ensure high quality programming and make the gathering affordable for individuals from diverse backgrounds, particularly students. Of the 250 people who registered for the conference, 95 self-identified as Indigenous, Metis or Inuit.

Annual Conference and General Meeting

In September 2017 the BPAA welcomed over 50 attendees and presenters to the annual conference at the Delta Edmonton South in Edmonton, Alberta. The conference focused on the “why” and “how” of publishing, and featured keynote speakers, pecha kucha sessions, editing and marketing sessions, and a “take away” closing discussion.

The 2018 BPAA Annual Conference and General Meeting is scheduled for September 13–15, 2018 in Calgary, Alberta at the Hotel Arts.

The Alberta Book Publishing Awards and Gala

The 2017 Alberta Book Publishing Awards were presented at a gala event in September, featuring a local playwright/director as the keynote speaker, and attended by over 120 people. The awards program invites submissions from Alberta based publishers in up to a dozen categories. Each category is adjudicated by an external jury, with shortlists and winners chosen to represent the very best of book publishing in Alberta.

“Read Alberta Books” Advertising Feature

With funding from the Canada Book Fund, the BPAA organizes and administers a collective advertising feature in Alberta Views magazine. Each year members are invited to submit their work in three regular ads, with an additional ad announcing the winners of the Alberta Book Publishing awards. Interest from publishers in this program remains strong and we fully subscribed each issue in 2017.

Professional Development

Professional development programming is based on the results of an annual survey and BPAA board and professional development committee recommendations. More than half of our professional development (by publisher hours) occurs at the annual conference with the remainder through ad-hoc seminars, workshops, webinars, and individual mentorship.

In 2017 professional development opportunities included one-and-a-half days of dedicated professional development at the annual conference along with:

- International Trade Development (one-on-one mentorship)
- Selling Foreign Rights (workshop)
- Exploring the German book market (one-on-one mentorship)

Book Displays and Marketing

The BPAA directly markets member publications and publishing houses to industry (libraries, booksellers, distributors) and the public by attending high-profile events and organizing retail book displays. We represented our members at the Alberta Library Conference in Jasper, Word on the Street Festival in Lethbridge, and Capital City Press in Edmonton.

Regional Library Project

In partnership with the Writers Guild of Alberta (WGA) and Alberta's Regional Library Systems, we gathered a collection of the books that have been shortlisted for the literary and book publishing awards from the previous year. We created a "Read Alberta Books" promotional poster and brochure, and book displays travel to the 320 library branches across Alberta.

Attendance at other conferences

An important part of our work is staying connected with members of the industry, and being informed about issues and trends that affect the industry. We attended various events and conferences, including the PubWest conference, the Association of Canadian Publishers Mid-Winter meetings and AGM, the Access Copyright AGM and the Alberta Magazine Publishers Association conference.

Our work on advocacy, networking, marketing and professional development keep our staff and members busy and active. It is a pleasure to work with such a dedicated group of members, and with a board that is engaged and responsive. We look forward to another good year ahead.

Respectfully submitted,

Kieran Leblanc
Executive Director

In 2017–18, the LPG continued its strategic goals of building relationships with readers, collectively brokering services and making them literary publisher-friendly, enhancing advocacy, and increasing the capacity of literary publishers through professional development. The LPG launched a collective export initiative and struck a committee to enable its members to participate at Frankfurt 2018, leading up to Canada as Country of Honour in 2020. A collective rights agent will represent members of the collective and the LPG will display books on the Canada Stand as well as produce a rights catalogue. This project is made possible with the support of FBM2020 and Livres Canada Books. The LPG is also conducting a marketing experimentation project with the support of the Canada Book Fund, to compare the impact of direct-to-publisher-funded marketing and promotion activities versus a collective project. LPG is building a custom book vending machine for Toronto's Island Airport and will be showcasing and selling books to travelers from June 1–Aug 31, 2018, with the help of an intern.

All Lit Up

All Lit Up remains the best online tool for us to reach a variety of readers and retain our loyal booklovers with fresh, engaging content from authors, staff, and the industry at large. Over the last fiscal year, we published just over 300 blog posts. The LPG's online bookstore and dedicated hub for Canadian literature reached its four-year launch milestone last fall, and continues to draw in new and repeat readers. The catalogue features 10,000 print and ebooks by 56 member publishers, and growing. An Indigenous literature page is being developed with original art from Indigenous designers. A dedicated marketing campaign will promote the page in the Fall of 2018. Publisher sales are modest but steady, and rush before the holidays. Customer demographics include remote locations with no independent bookstore, and this year's goals are to add bundling, improve searchability, launch a gifts page, and build a poetry showcase page. All Lit Up is a collaboration with 49th shelf, Stison Publishing Solutions, eBOUND Canada, and BookNet Canada. These contracts and technology are of possible interest to other associations or publishers for their own direct-to consumer goals.

Advocacy and Policy

The LPG continues to collaborate with the ACP in its lobbying activities, sending its board executive to meetings with MPs in November 2017, as well as participating in Arts Day on the Hill. Copyright remains a priority issue during the review of legislation that is now underway. An increase to Canada Book Fund continues to be a priority, with Support for Organizations 40 percent oversubscribed, and after a recommendation to the Standing Committee on Finance for budget 2017 was put forward but not yet realized.

The LPG extends its advocacy to the public through promoting the growth and value of Canadian literary culture, raising the awareness of independent publishing, on All Lit Up's blog, at events, and through promotional materials. This year, the LPG will seek to revamp its organizational website www.lpg.ca to include blog content that is more publisher, industry, and public-facing, aside from its reader and customer-facing All Lit Up.

Event Marketing and Promotions

The LPG increased awareness of and sold its members' books directly to the public by attending events such as Word on the Street, Word Vancouver, OLA, Congress, Brampton Book Bash, and Reading for the Love of It. We sold books at AWP for the second time in the US and hope to grow our success there.

Seasonal marketing campaigns included #PoetsResist for National Poetry Month, highlighting the work of poets addressing social justice topics, ALU Time Capsule, celebrating literary publishing through the decades, and Bingemas, a holiday campaign aimed at pop culture enthusiasts.

Professional Development

The LPG ran 28 professional development opportunities across Canada and online, continuing new formats such as mentorships and reducing webinars. For the second time, we offered a dedicated PD day around our AGM, and continued to collaborate with regional associations, as well as hosting #LPGchat on Twitter and an Ask a Text-pert forum conversation. We're looking forward to collaborating with the ACP and BPC to program at Book Summit 2019 during AGM season.

Sales Force

The LPG continued to work with its third-party sales force, Canadian Manda Group. Gross sales were higher than ever in LPG's new sales force structure, and returns held even over last year, showing net growth. Poetry sales were up, as were independent bookstore sales, and we are thrilled for the opening and announcement of several new bookstores in BC, ON, QC, and NS.

LitDistCo

LitDistCo launched Books In Hand Distribution, providing distribution services for non-LPG members, and took on its first clients with books of all genres as part of its business expansion plan. The Board remains governed by LPG members.

Thanks to everyone that has supported and collaborated with our organization in the last year: staff, volunteers, members, friends in the writing and publishing community, government officials, elected representatives, and the public at large.

Respectfully submitted,

Christen Thomas
Executive Director, LPG



Members

The OBPO has welcomed five new members in the past year: Beech Street Books, Blue Moon Publishers, Broadview Press, Chizine Publications, and Firefly Books.

Diverse Interns Initiative

The OBPO partially funded six internships for OBPO members from January to April 2018 in an effort to increase diversity in Ontario publishing. Ultimately, a blind jury awarded \$3000 each (to put towards a \$6000 honorarium) to: Biblioasis, Brick Books, Second Story Press, ECW Press, Blue Moon Publishing, and Between the Lines Books. The OBPO is thrilled by the enthusiasm for this project and will be discussing funding for internships in the future.

49th Teachers

As many of you know, the 49th Teachers initiative is the product of two successful applications to the OMDC's new Canadian Books in Ontario Schools marketing fund, which was in part a result of the OBPO's years of advocating for more Canadian books in schools. The beautiful 49thTeachers.com (a division of the 49th Shelf) launched in February and boasts over 800 teaching resources! Our Educational Consultant, Helen Kubiw (Teacher-Librarian and blogger behind CanLit for Little Canadians) is now in full promotion mode, with the help of an advisory committee meeting of teacher-librarians. She is promoting the website at conferences, at Faculties of Education, at PD Days, and online through webinars and social media. We've also created an instructional video thanks to Owlkids Books and the website is also being promoted at teacher book-buying events through Tinlids Inc.

OLA Super Conference 2018

25 publishers displayed within the Ontario Book Publishers Pavilion, making us by far the largest exhibitor on the expo floor. With 57 authors signing books, promotion online and in the conference program, members were able to reach thousands of library staff and gather the contact information of nearly 600 attendees.

What's Your Story 2018

The third and final What's Your Story event series will be held in the spring and fall of 2018. Two emerging writers and two writers previously published by OBPO members from Etobicoke, North York, East Toronto, and Scarborough will be featured.

Open Book

Thanks in part to the work of the Open Book Advisory Board (Kate Condon-Moriarty, Chase Joynt, Canisia Lubrin, Laura Meyer, Hazel Millar, Michael Mirolla, and Amelie Roberge) Open Book's web traffic is way up: over 30% up, in fact. Our overall top pages are columns by Jen Sookfong Lee and Alicia Elliott, followed by guest columns and special features, as well as our events page.

Prepared by,

Holly Kent
Executive Director

SaskBooks' primary administrative support was reduced by 5% in 2017–2018, a reduction which the Association was able to absorb.

ONIX Database

The newly renovated ONIX inventory database was thoroughly tested and is functioning with acceptable parameters. SaskBooks has almost a thousand titles in inventory.

Book Week

Saskatchewan Book Publishing Week toured ten authors to six communities in Saskatchewan, promoting ten titles from nine publishers. The tour hit four libraries, four schools, one community hall, and one theatre, received some press, and showed off great books to hundreds of people.

Catalogue

The Read Saskatchewan catalogue featured 69 books from 21 publishers. We distributed the catalogue with the Western Producer and, for the first time, with Zoomer Magazine. This distribution resulted in more than 130 orders from November to March. Via the annual industry survey, publishers rated the catalogue in the top three most valued programs SaskBooks provides.

Display

SaskBooks attended 22 Displays in 11 locations in 2017–2018. This included two teachers' conferences, two library conferences, and 18 trade shows/non-traditional venues. Total book sales during this period was \$35,319.

Reviews

Daniel produced and edited 62 reviews from a stable group of 6 reviewers in 2017–2018. Reviews were distributed to a growing opt-in list (available to join through Facebook and through <http://reviews.skbooks.com>), to Saskatchewan weekly newspapers, and were published on our reviews site. We promoted the published reviews on Facebook and on our Reviews Twitter feed (@SPGBookReviews). More than 300 people follow Reviews Twitter.

Website & Social Media

SaskBooks' website logged more than 25,000 unique visitors who clicked on our URLs more than 70,000 times. The heaviest traffic to the website is in November and December. The most accessed page on our website is the bookstore, followed by our list of publishers. The most downloaded content from the website is our catalogue.

SaskBooks has more than 1,200 followers on Twitter. Our Facebook page has grown to over 1,700 follows and nearly 1,800 "likes." We see the most engagement on Facebook when we advertise our Professional Development sessions.

Professional Development

Six half day sessions were held in September and November 2017 and in March 2018. In September we partnered with the Saskatchewan Writers Guild for a Publishing Symposium which sold out early. In November we partnered with SMPIA to provide a Books to Film pitch session. The two day conference in

SaskBooks

June received included a stakeholders event—a river boat dinner and cruise down the mighty Saskatchewan.

Staffing

Brenda Niskala, Jillian Bell, and Daniel Parr were SaskBooks' permanent staff in 2017–2018. Staff member Brenda Niskala represents SaskBooks on the Association of Creative Industries of Saskatchewan (ACIS) board. Staff members Daniel Parr and for the remainder of the term, Brenda Niskala, represented book publishers on the Saskatchewan Book Awards board. Victoria Koops, Tammy Robert, Mazin Saffou, and Deana Driver completed short-term contracts for SaskBooks in 2017/2018.

Membership and Board

The SaskBooks had 47 members at the end of 2017. SaskBooks Board of Directors for 2017/2018:

President	Morgan Tunzelmann, University of Regina Press	Members-at-Large	Byrna Barclay, Burton House Books
Vice President	Belinda Riehl-Fitzsimmons, Saskatchewan Archaeological Society		Blair Fornwald, Dunlop Art Gallery
Past President	Heather Nickel, Your Nickel's Worth Publishing		
Treasurer	MacKenzie Hamon, Coteau Books		

Submitted by,

Brenda Niskala
Executive Director

Notes

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