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Forming Cleveland: A Visual Arts, Craft And Design Industry Study: Full Report

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Prepared for:

COMMUNITY PARTNERSHIP FOR ARTS AND CULTURE

Prepared by:

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**FORMING
CLEVELAND:
A VISUAL ARTS,
CRAFT AND
DESIGN
INDUSTRY
STUDY**

**CENTER FOR
ECONOMIC
DEVELOPMENT**

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About the Community Partnership for Arts and Culture

CPAC is a nonprofit with a mission to strengthen, unify and connect greater Cleveland's arts and culture. Research is a core component of our work, and one of many ways we support arts and culture. CPAC provides counsel related to public policy that benefits the sector and the broader community. It provides a number of tools through cultureforward.org and mycreativecompass.org for arts and culture professionals and those who would like to engage with them. CPAC also carries out a variety of programs and services that help build the sector's organizational and business practices to support a vibrant, thriving greater Cleveland. www.cultureforward.org

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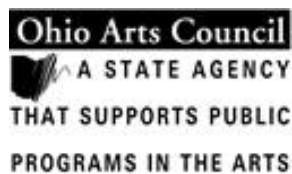
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FORMING CLEVELAND

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Iryna Lendel is Assistant Director of the Center for Economic Development at the Maxine Goodman Levin College of Urban Affairs at Cleveland State University. Dr. Lendel was the principal investigator for this project and developed the overall framework and methodologies for research components of the project. Lendel managed the team of researchers and participated in each phase of the project. Dr. Lendel is an economist with 16 years of experience conducting applied economic research and analyzing regional and urban economic development. Her research portfolio includes projects on industry analyses; state and regional science and innovation policies; university products; and high-tech, emerging, and creative industries and their role in economic development. Dr. Lendel has also conducted multiple economic impact analyses. Lendel is an associate editor of *Economic Development Quarterly* and was named a Fulbright New Century Scholar for 2009-2010.

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Merissa C. Piazza was involved with all elements of the design, measurement, collection, and analysis of the three surveys conducted in this study: Survey of Art Fairs, Survey of Galleries, and Survey of Visual Artists; as well as the occupational analysis of the Cleveland Visual Arts, Craft and Design sector, and the supply of and demand for musicians in Northeast Ohio. Piazza is a Research Associate for the Center for Economic Development at the Maxine Goodman Levin College of Urban Affairs at Cleveland State University. She specializes in economic development, regional economic analysis, industry and occupational analysis, and survey design, methodology, and analysis. She holds a Master of Public and International Affairs degree and in addition to working full time for the Center is a doctoral student in Urban Studies and Public Policy with a concentration in economic development.

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Andrew Lang was a research assistant with the CSU team throughout the duration of this project. He created the directories for this study and contributed to organizing and conducting the interviews, focus groups, surveys, and an advisory committee meeting. He worked on providing background material for the case studies, assisted in the writing of the vignettes, and contributed in the analysis of the focus groups. Andrew also helped with the preparation of data for the industry and occupational analyses for the Cleveland Visual Arts, Craft and Design sector. Currently, he is pursuing a Master of Urban Planning, Design and Development (MUPDD) degree from the Maxine Goodman Levin College of Urban Affairs at Cleveland State University.

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EXECUTIVE SUMMARY

“The purpose of art is washing the dust of daily life off our souls.”

- Pablo Picasso

Art, as illustrated by Picasso’s quote, possesses the unique ability to cleanse our souls of everyday monotony. Given the transformative capabilities of art, we wondered how the arts could help revitalize a city, and, perhaps, revive an entire region. Can the same then be true for the “souls” of our cities, or even the collective soul of a region?

The Visual Arts, Craft, and Design (VACD) sector,ⁱ encompassing a wide spectrum of creative endeavors, has an impact on all of us in often surprising ways. When we speak generally of the “visual arts,” names like Rembrandt, Cassatt, Warhol, and Bearden may come to mind; however, the Cleveland VACD sector, including all of Cuyahoga County for the purposes of this study, reaches well beyond conventional definitions of art to encompass a variety of consumer products such as jewelry, furniture, and even homes.

In the past, the three great centers of the Renaissance—Rome, Florence, and Venice—provided great examples of energizing industrial innovation “from [creating] the world’s largest masonry dome to linear perspective, modern-day portrait painting, technical breakthroughs in glassblowing and bronze casting, the italic type of the Aldine Press, sfumato and chiaroscuro, and the designs in Leonardo’s sketchbooks.”ⁱⁱ The creative energy of the Renaissance promoted urbanization and created a community of painters, craftsmen, and sculptors intensely interacting in dense cities with peers, learning from each other, exchanging ideas and techniques.ⁱⁱⁱ The growing prominence of artists in this time period “allowed for creative interpretation and stylistic flexibility” of artists’ work, leading to more innovative ideas funded by negotiated contracts.ⁱⁱⁱ Thus, the Renaissance provides a blueprint for utilizing the arts to foster cutting-edge engineering advancements in an urban environment. Bernard Ferrari and Jessica Goethals describe the positive metropolitan effects of this collaboration:

Then the city of Florence began construction of its now-famous Basilica di Santa Maria del Fiore (more commonly known as the Duomo) and in 1419 sought an architect to build a dome to cover the massive, 42-meter-wide space above the church’s chancel. Such a vast space had not been capped with a dome since the Pantheon’s construction, in ancient times. To overcome this extraordinary architectural challenge, Brunelleschi, who won the commission, developed a number of engineering techniques and construction practices. . . . His masterpiece defied precedent on innumerable levels: it was the first octagonal dome in

ⁱ The VACD will also be referred to as “the visual arts sector” or “visual arts.”

ⁱⁱ Bernard T. Ferrari and Jessica Goethals. “Using rivalry to spur innovation.” May 2010. Source: http://www.mckinsey.com/insights/innovation/using_rivalry_to_spur_innovation. P.1.

ⁱⁱⁱ See Elizabeth S. Cohen and Thomas V. Cohen, *Daily Life in Renaissance Italy*, Westport, CT: Greenwood Publishing Group, 2001, pp. 7–8.

ⁱⁱⁱ Bernard T. Ferrari and Jessica Goethals. “Using rivalry to spur innovation.” May 2010. Source: http://www.mckinsey.com/insights/innovation/using_rivalry_to_spur_innovation. P.3.

history, the first dome to be built without a wooden supporting frame, the largest dome in existence at the time, and is still the largest masonry dome in the world. By drawing on the past and innovating beyond it, Brunelleschi was able to achieve what many had deemed impossible. (2010, p.4)

As this example demonstrates, the arts provide both aesthetic and economic benefits to individuals and cities alike. Likewise, much current research reveals how existing artistic and cultural production has direct economic benefits for regional economies by attracting investments, generating tax revenues, encouraging in-migration of workers, and energizing tourism and consumer purchases.^{iv} Furthermore, economic development intermediaries, public policy makers, and the general public increasingly recognize the impact creative ideas and entrepreneurial workforce can have on economic performance.^v

In this study, the economic impact's full breadth is considered by analyzing a wide spectrum of economic sectors and occupations beyond those commonly associated with artists. The authors believe that artistic creativity enhances many areas of the regional economy, including, design, marketing, packaging, and presentation of products and services in various sectors. This hypothesis is consistent with an approach used by Ann Markusen in her assessment of *artistic dividends*.^{vi} According to Markusen, the *artistic dividend* refers to a concentration of artists in a particular area that leads to a widespread impact over a broad range of industries in a regional economy. We did not replicate Markusen's study in this research; instead, through statistical analyses of data and interviews and focus groups, we demonstrated how the economic effect of the VACD sector expands beyond direct economic benefits of the artists.

This study illustrates the extensive economic impact the Cleveland visual art sector has on the economy of Cuyahoga County. The report's case studies also uncover the Cleveland VACD sector's economic contributions to industries outside of the VACD, emphasizing the larger potential the visual arts industries have for regional economies.

ARTS AS A COMPETITIVE ADVANTAGE

The VACD sector, along with other arts and culture disciplines, can provide a region with a "sticky," or long-lasting, regional competitive advantage in the form of an economic *base* industry – one that is capable of creating local economic benefits by exporting its products beyond the regional boundaries.

^{iv} *Arts and Economic Prosperity. The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences. IV Summary Report.* Americans for the Arts. Source: <http://letsgoarts.org/document.doc?id=979>
The Economic Impact of Nonprofit Arts & Culture Organizations in Oklahoma. Americans for the Arts. Source: http://www.arts.ok.gov/pdf/about_us/EIStudy0110FullReport.pdf. For more information, refer to reports at the Americans for the Arts website: <http://www.americansforthearts.org/by-program/reports-and-data/research-studies-publications/americans-for-the-arts-publications/research-reports>.
Arts, Culture, and Economic Prosperity in Greater Philadelphia. Greater Philadelphia Cultural Alliance. 2012. Source: http://www.philaculture.org/sites/default/files/2012_prosperity_report_single_pages.pdf.

^v Jennifer Novak-Leonard. *Measuring Chicago's (Artistically) Creative Economy.* Cultural Policy Center at the University of Chicago. May 2014. Source: <http://culturalpolicy.uchicago.edu/creative-economy/creative-economy.pdf>.

^{vi} Ann Markusen and Greg Schrock's study use this concept in their investigation of urban artistic specialization and economic development implications, in *Urban Studies*, Volume 43, No. 10: 1661-1686, 2006. "Artistic dividends" are also discussed in earlier publications by Ann Markusen and co-authors.

As in the Renaissance, new knowledge is created when artists look at the world with their unique perspective to spark conversations on previously unseen possibilities. Inventions can then occur when the ideas are conceptualized into a novel product—a real-time digital visual input, 3-D printing, or a material that precisely controls the flow of light and color through structure. Innovation occurs when the invention is applied in practice: an Internet conferencing based on a real-time visual input, manufacturing car parts from 3-D printed prototypes, or ALON (transparent aluminum) or translucent concrete manufactured from a material that precisely controls the flow of light and color through structure. Collectively, such ingenuity holds great potential for spurring a multitude of economic and social benefits if a region embraces it and provides necessary support.

This study illuminates the Cleveland VACD sector's role in the regional economy, illustrating its importance and providing a platform for developing practical steps to sustain and grow the visual arts. Both quantitative and qualitative findings support VACD's image as vibrant, diverse, and primed for the productive application of creative ideas and innovative techniques. The research team characterizes VACD as an amalgamation of distinct visual art mediums along with broader maintenance and communication functions associated with the sector.

The VACD sector, nonetheless, is at or near its regional audience capacity, which creates some limitations for endogenous growth, or growth from internal resources. As an economic development driver, however, the sector has the potential to grow beyond a local niche, creating a regional competitive advantage in art products appealing to a national or even international audience. When taking into account the scale and scope of the regional visual arts talent network, the existing institutional support, real estate fundamentals, and cooperative character of the visual arts scene, it becomes clear that the VACD sector is currently operating below its capacity to create a more significant regional economic impact. The research team believes this sector provides a unique competitive advantage for greater Cleveland and represents a potential source for new and continued economic growth.

ABOUT THIS REPORT

This study was commissioned by the Community Partnership for Arts and Culture (CPAC) and follows CSU's first report, *Remix Cleveland*, which examined Cleveland's music sector.^{vii} The study identifies the VACD sector by delineating its components, learning its dynamics, and assessing the economic impact it has on the regional economy.

The Center for Economic Development (referred to hereafter as "the Center") of the Maxine Goodman Levin College of Urban Affairs at Cleveland State University conducted this study. The Center gathered answers to a set of core research questions regarding the typology and economic impact of the Cleveland VACD sector with methodology adapted from the broader research framework of *Remix Cleveland*:

- What constitutes the VACD sector in Cuyahoga County – composition of industries and occupations?
- What characteristics help describe the sector now and its dynamics over the last decade?
- What industries, components, and types of products are significant to the vitality of the Cleveland VACD sector?
- Which unique properties of the Cleveland VACD sector make it thrive and contract?
- What challenges is the Cleveland VACD sector experiencing?
- What are prominent examples of success in the Cleveland VACD sector?
- What economic impact do the Cleveland VACD sector and its components create for the local economy?

We believe the findings of this report will spur a discussion and provoke creative thoughts leading to investments, regional dialogue, improved public policies, and a clear vision for the role of this sector in the regional economy.

The research phase of this study occurred in 2013-2014. This report summarizes the detailed findings and methodologies in nine chapters with each chapter reflecting a different stage of the research.

Chapter 1 delineates the breadth and depth of the Cleveland VACD sector, organizing it into a structural framework of industries that house visual art-related businesses and nonprofits. The typology accounts for two non-hierarchical industry levels, and the second level details different visual art mediums providing visibility to the prominent subsectors while also minimizing the need for data suppression^{viii}. The Cleveland VACD sector was analyzed in comparison to the regional and national economy, as well as similar regions, while simultaneously illustrating the sector's dynamics over time. Indicators such as employment and wages delineated the size and scope of the VACD sector. Because this study was conducted at an industry level, an analysis of worker's occupations was also included in Chapter 2. Those individuals who have visual arts-related skills and who are employed across all industries in

^{vii} Iryna Lendel, Sharon Bliss, Candice Clouse, Merissa Piazza, Ziona Austrian, Kathryn W. Hexter, Renee Constantino, and Matthew Hrubey. "Remix Cleveland - The Cleveland Music Sector and Its Economic Impact." Center for Economic Development, Cleveland State University. October 2011. Executive summary: http://engagedscholarship.csuohio.edu/urban_facpub/428/. Full report: http://engagedscholarship.csuohio.edu/urban_facpub/427/.

^{viii} Data suppression refers to a requirement of withholding data that otherwise could be used to identify individual respondents.

Cuyahoga County were grouped by commonalities of talents and abilities – e.g., occupation. Then, these groups were analyzed through the lens of a broader region – the Cleveland Metropolitan Statistical Area (MSA) – due to data availability.

Chapter 3 enriched the quantitative analyses of industries and occupations with qualitative findings and reflections of individuals who attended one of the six focus groups. These local visual arts scene representatives described the richness of the local visual arts scene, opportunities for young artists, importance of educational institutions, the viability of arts neighborhoods, and the challenges of a limited consumer base. Dovetailing these rich descriptions are findings from the survey of individual artists in Chapter 4. This survey provides a deeper understanding of how professional artists function; moreover, it reveals how amateur artists complete their work often supported by a household, with other family members' income supporting an artist.

Chapter 5 looks deeper at the contribution of artists to the local economy by studying the supply of local artists and the demand from both in- and outside the region. According to the survey of artists at local art fairs, the elevated supply of local artists in the region and high quality of local art are often hurt by a perceived lower reputation of Cleveland's art when compared to other prominent art locales like New York or San Francisco. The mystery of art commerce continues to be unveiled in the following chapter (Chapter 6), which describes the import and export of local arts via the lens of art galleries. Chapter 6 not only reflects on local arts but also refers to broader conceptual changes surrounding the sale of art and consumer outreach through digital media and new forms of retail.

In Chapter 7, all of the VACD sector's components are assembled into one industrial cluster to assess its economic impact on Cuyahoga County. The 2013 economic impact is calculated by including local employment of artists across various industries, individual and amateur VACD artists, and contributions made to the local economy via visitor spending at art events and galleries.

Chapter 8 includes eight case studies:

- *MOCA Cleveland: Sturdy, Dynamic, & Stylish* – The Museum of Contemporary Art (MOCA) Cleveland
- *Tremont: Creative Placemaking* – the Tremont neighborhood
- *St. Clair Superior: Creative Reuse* – the St. Clair Superior neighborhood
- *Public Art: Placemaking in Action* – public art in Cleveland
- *Artist Activists: Heightening Social Awareness* – Donald Black, Jr. and Mimi Kato
- *CAN Journal: Pressing for Change* – The Collective Arts Network (CAN) Journal
- *Dan Cuffaro: Remaking the Regional Economy* – designer, educator and businessmen Dan Cuffaro
- *Cleveland CycleWerks: Starting Up* - motorcycle manufacturer Cleveland CycleWerks

Finally, Chapter 9 provides directories of visual arts organizations and individual artists followed by appendices with detailed data, methodological instruments, and databases of artists and art organizations.

VISUAL ARTS LEGACY

Cleveland may not be the first city that comes to mind when thinking of a rich visual arts legacy, but the city's assets and potential are, nevertheless, quite impressive. The earliest recognition for the city came in 1876 when local artist Archibald Willard presented *The Spirit of '76* at the Centennial Exhibition in Philadelphia to widespread acclaim.⁹ Following the success of the exhibition, Willard returned to Cleveland and founded the Cleveland Art Club, beginning a long tradition of collaboration among artists. Interestingly, today's collaborative visual arts landscape in Cleveland was shaped by the 20th century industrial market for artistic talent and products. The commercialism of the visual arts, as seen in the lithography, engraving, and publishing industries at the turn of the 20th century, gave artists the opportunity to make a living while simultaneously producing their own personal art. With the freedom of financial security in hand, Cleveland's artists found that cooperation, not competition, was the order of the day.

By 1890, applied design disciplines like architecture also began to make their mark on the city with the opening of the internationally acclaimed Arcade. This was the first hint of a budding Golden Age for the Cleveland's visual arts and design sector. Cleveland's 1903 Group Plan, conceived by architects Daniel Burnham, Arnold Brunner, and John Carrere, represented one of the first fully realized city plans formed during the so-called City Beautiful Movement. This plan laid the foundation for many of Cleveland's major landmarks, including, The Mall, the Federal Building, and Cleveland City Hall. Shortly thereafter, American Greetings (1906), which would become the world's largest publicly owned manufacturer and distributor of greeting cards, was founded in Cleveland.¹⁰

A few years later, the Cleveland Society of Artists (1913), a revival of the stalled Cleveland Art Club, and the Kokoon Arts Club (1911) were initially established as competing efforts representing conservative and modern approaches, respectively; however, their members began a path towards collaboration. Additionally, the Cleveland Museum of Art (1913), endowed in 1891, was also established around this time, providing a measure of prestige that only a dedicated art museum could offer a region. The museum would serve as an important springboard for young artists, many of whom were coming from the neighboring Cleveland School of Art (Cleveland Institute of Art since 1948), which had among its faculty the renowned Cleveland painter Frederick Gottwald. As one of the most important supportive means for local artists, the museum offered its renowned May Show (1919-1993), an annual juried exhibition of Cleveland's local visual artists and crafters. The May Show would end up exhibiting many artists from the Cleveland School – a testament to the innovativeness and collaborative effort found in Cleveland at the time, particularly in the medium of watercolor paintings.

Before the Great Depression, Cleveland was nationally recognized as a city with a high concentration of artists and a distinctive cluster of visual arts. Unfortunately, the art sector was sustained by industries that were hit hard by the economic decline of the 1930s. The Depression took a heavy toll on the arts and the arts organizations that had relied on members with steady paychecks and discretionary dollars provided by local industry. Still reeling from this shock in the 1940s and postwar era, the visual arts sector in Cleveland sought to double down on the practical application of the arts through an increased emphasis on applied design disciplines, for example, at the Cleveland Institute of Art. This shift led, in part, to what would become an arts scene less dominated by citywide artist groups and more focused

⁹ The Encyclopedia of Cleveland History, <http://ech.case.edu/cgi/article.pl?id=A18>.

¹⁰ To learn more about Cleveland's art history, go to www.clevelandartandhistory.org.

on neighborhoods and their unique contributions particularly during the late 20th and early 21st centuries.

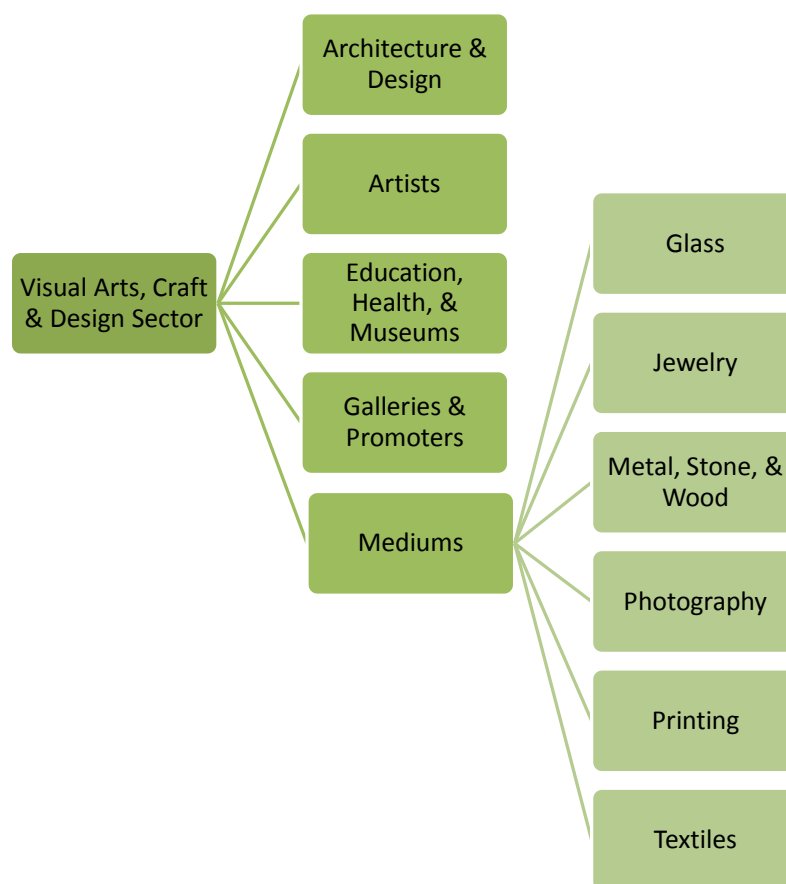
The development of Cleveland's robust community development corporation (CDC) networks strengthened this organic shift toward neighborhoods. The move has led to changes in perceptions and definitions surrounding Cleveland's visual arts, with lower-profile, but nonetheless high quality art, occurring at the neighborhood level. The postwar prominence of applied disciplines like Industrial Design and Architecture, supported by the strength of the region's manufacturing and Fortune 500 corporate profile, would find the transition in the regional economy particularly damaging in subsequent decades. Declines in many corporations among the Fortune 500, fueled in particular by the decrease in manufacturing employment, have made the neighborhood-based artists, who were otherwise largely shielded from these trends, of greater importance to the VACD sector. Today, approaches that support and encourage these neighborhood-based artists, like those found in the Tremont and St. Clair Superior neighborhoods, have experienced continued success in Cleveland.

THE VISUAL ARTS THROUGH DATA

The study began by creating a detailed definition of the VACD sector in Cuyahoga County. The research team created an industrial profile of the sector, including functional components and art mediums applicable for data analysis. Each component and art medium corresponds to a regional industry or group of industries as identified through a North American Industry Classification System (NAICS) code (Figure I). This methodology allowed the team to assess the typology of industries within the VACD sector and analyze trends of industries and sector components over time.

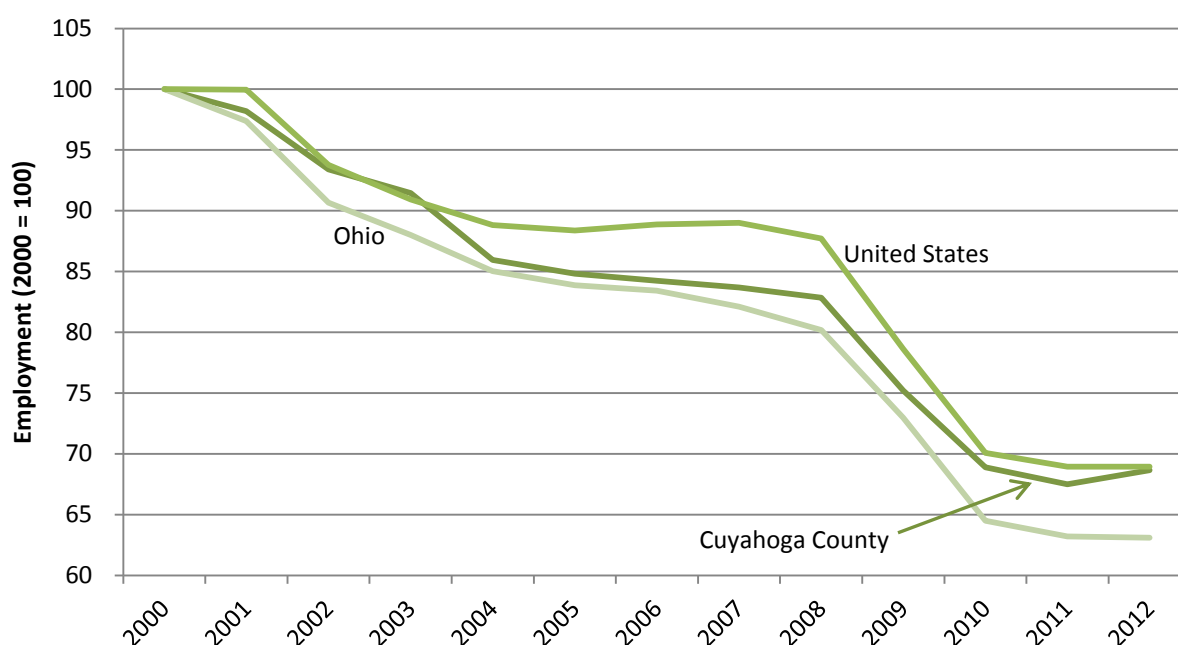
Often, industrial studies are conducted according to their products with respective product cycles and applicable innovation. However, this study found that the visual arts are not as homogeneous as other industries. Instead of being separated by functional components of one industry (i.e. music), the VACD sector was divided into five categories and six mediums. While determining the categories, the team discovered that the *Architecture & Design* sector has a different culture and business model with significantly different wages and employment modes for artists, making this subsector its own category. Also, due to data limitations, the team could not split the category of *Artists* into any specific medium or genre, so this small sector was made into a typological unit. Lastly, the *Education, Health, & Museums* and *Galleries & Promoters* categories represent businesses that also act as a communication mechanism for the industry and substantially differ from the other sub-sectors. Thus, the five categories are: *Artists; Mediums; Architecture & Design; Galleries & Promoters; and Education, Health, & Museums*. Additionally, the six various mediums were classified as a unit and as separate entities in the analysis. The team divided the *Medium* category into six subcategories according to the product's primary material (glass; textile; metal, stone and wood), technological process (photography, printing) or application (jewelry). The rationale is that each medium creates unique inventions applied through either self-proprietorship (individual artist's business) or a business model of an incorporated businesses (with paid employees).

Figure I. Typology of VACD Sector in Cuyahoga County



In 2012, the Cleveland VACD sector totaled 9,573 employees. This sector experienced a 31.4% decline from 2000-2011, but between 2011 and 2012, the VACD sector in Cuyahoga County grew by 1.7%. This percentage may seem small compared to the decline, but it becomes more impressive when considering the visual arts' continued decline statewide and stagnancy nationwide during the same time period (Figure II). Moreover, while employment decreased from 2000 to 2012 in Cuyahoga County, the VACD's employment trend is characteristic of employment patterns for both the United States and Ohio. All three geographic regions follow very similar patterns throughout the study period, although the employment in individual VACD subsectors varied.

Figure II: Index of VACD Employment, Cuyahoga County, Ohio & U.S.

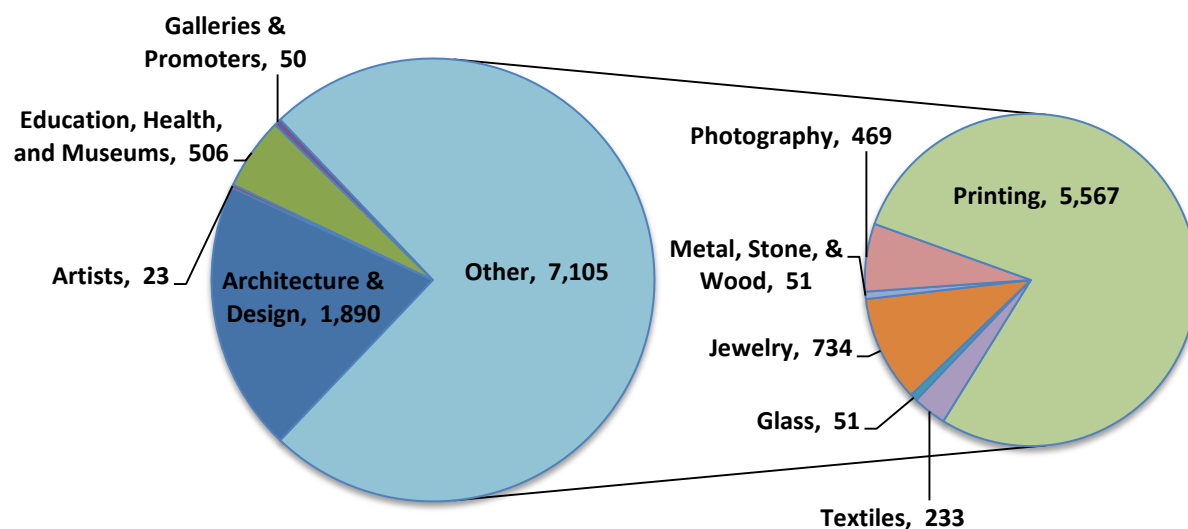


Source: Quarterly Census of Employment and Wages (QCEW)

The *Printing* subsector, the largest VACD medium, dominated the 2012 employment with 5,567 employees and 58.1% share of all VACD employment in the Cleveland area (Figure III). *Printing* includes eighteen industries all related to art printing: periodical publishers and books printing, commercial printing and their supporting activities, professional equipment manufacturing for printing and support materials (like ink and stationary products) manufacturing, and wholesale and retail (both physical and electronic) sales related to printing. This sector lost 3,082 jobs from 2000 to 2012 due to large losses in a few sizable businesses and across the subsector.

The second largest subsector was *Architecture & Design*, though at 1,890 jobs and 19.7% share, it is just under one-third the size of *Printing*. *Artists* have the lowest levels of employment, at 23 employees, which is a characteristic of the industrial data approach that undercounts individual artists not employed by a particular company as defined by an NAICS code. Other components of this study, such as focus groups, case studies and surveys, supplemented understanding of this undercounted segment. subsectors with employment numbers under 100 are *Glass, Galleries, & Promoters* and *Metal, Stone, & Wood*.

Figure III. 2012 VACD Employment by Subsector in Cuyahoga County

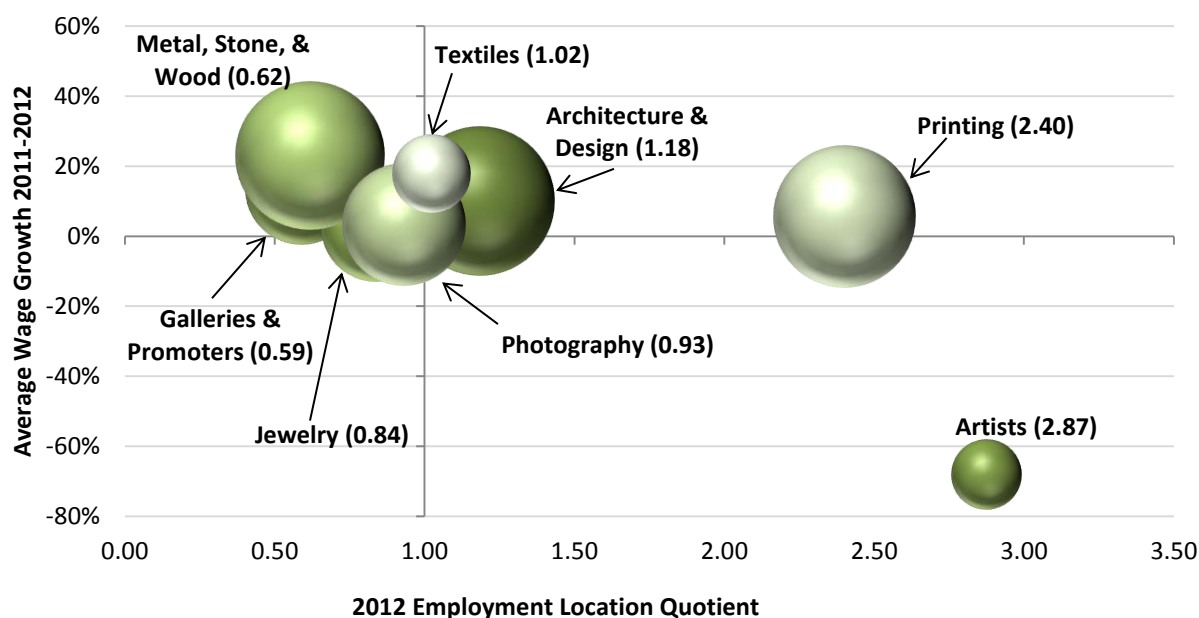


Source: Quarterly Census of Employment and Wages (QCEW)

Sectors with location quotients (LQ) above one suggest that they have the potential to export their products outside of the region, bringing money into the local economy.¹¹ In analyzing this sector's concentration and its components by using 2012 employment LQ, *Artists* showed strong regional presence compared to the same share of this subsector in the U.S. (2.87) (Figure IV).¹² Other subsectors with an LQ above one include *Printing* (2.40); *Education, Health, & Museums* (1.84); *Architecture & Design* (1.18); and *Textiles* (1.02). These sectors, except *Artists*, also experienced increased average wages and, combined, illustrate a strong potential to export their products outside of the region.

¹¹ Location Quotient is a technique for determining which sectors are export-oriented. Export-oriented sectors are defined as having location quotients greater than 1 and import-oriented sectors have location quotients of less than 1.

¹² The *Artists* subsector is very small and represented only 23 employees in 2012. Therefore, we are hesitant to say that there is a statistically significant overrepresentation of artists in the county due to this sector's small size and the data reliability.

Figure IV: Employment Location Quotient and Average Wage Growth of the Cleveland VACD

Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data adjusted to 2012 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County. In addition, the subsector *Education, Health, & Museums* is not included in Figure IV due to data suppression.

Printing and *Architecture & Design* – two very strong applied visual arts fields – have a market niche and reputation that crosses the county’s boundaries, and growing wages in these sectors approximate healthy labor productivity. The high concentration of visual artists in the area approximates the export capacity for their products. Research findings support the hypothesis that VACD’s products are an asset to the economy and increase the standard of living in Cuyahoga County and Cleveland.

Anecdotal stories testify to the success of these two sectors in Cleveland. Many architecture businesses have experienced project increases due to funding from outside of the region. K2M Architecture Inc., Westlake Reed Leskosky, Vocon, and RDL Architects Inc. represent a small sampling of such firms.¹³ The success of industrial design in Cleveland is not only built on a legacy of the region’s native Viktor Schreckengost and supported by educational programs, but is also poised for future growth through the strong leadership of teachers, designers, and businessman like Dan Cuffaro – the central figure of this report’s industrial design case study (see *Dan Cuffaro: Remaking the Regional Economy*).

To add a more comprehensive angle to the analysis, we collected VACD sector information by occupation and broadened the geography to include the entire Cleveland MSA¹⁴ due to data availability and suppression.¹⁵ Rather than merely identifying art industries, this analysis focuses on occupations, that is, the skills held by members of the workforce across all industries. While total employment of the

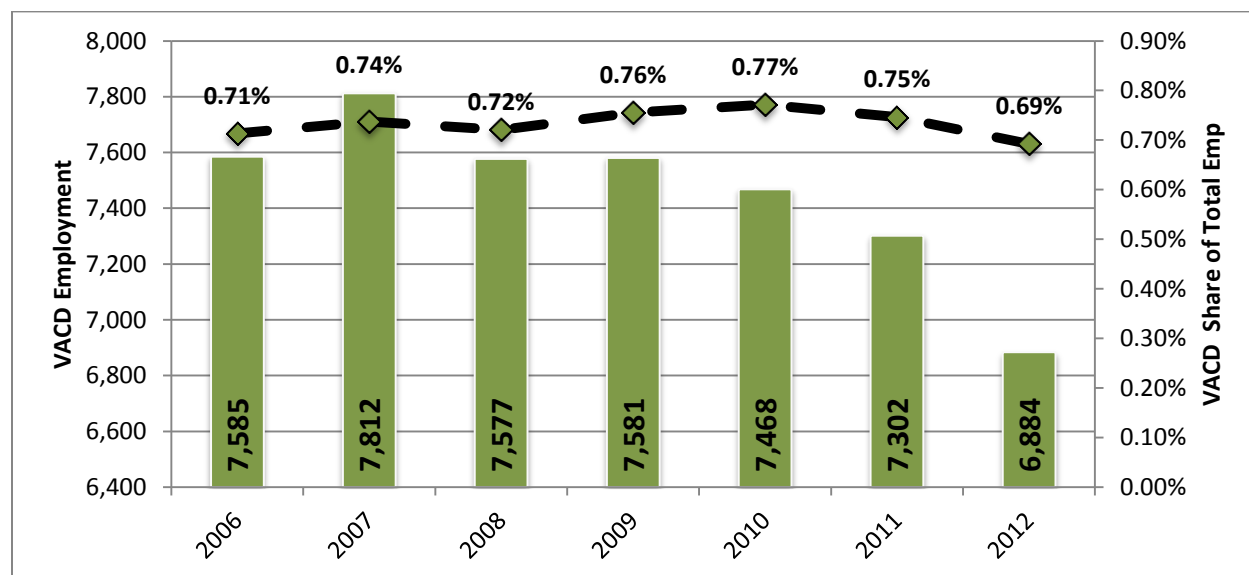
¹³ Stun Bullard. “Area architects are drawing business from everywhere.” *Crain’s Cleveland Business*. August 18, 2013.

¹⁴ The Cleveland MSA includes Cuyahoga, Geauga, Lake, Lorain, and Medina counties.

¹⁵ Data suppression refers to a withholding data requirement that otherwise could be used to identify individual respondents.

VACD occupations declined over time, the share of visual artists in the total Cleveland MSA employment remained almost unchanged between 2006 and 2011, only slightly declining in 2012 (Figure V).

Figure V. VACD Employment and Share of Total Employment in the Cleveland MSA, 2006-2012



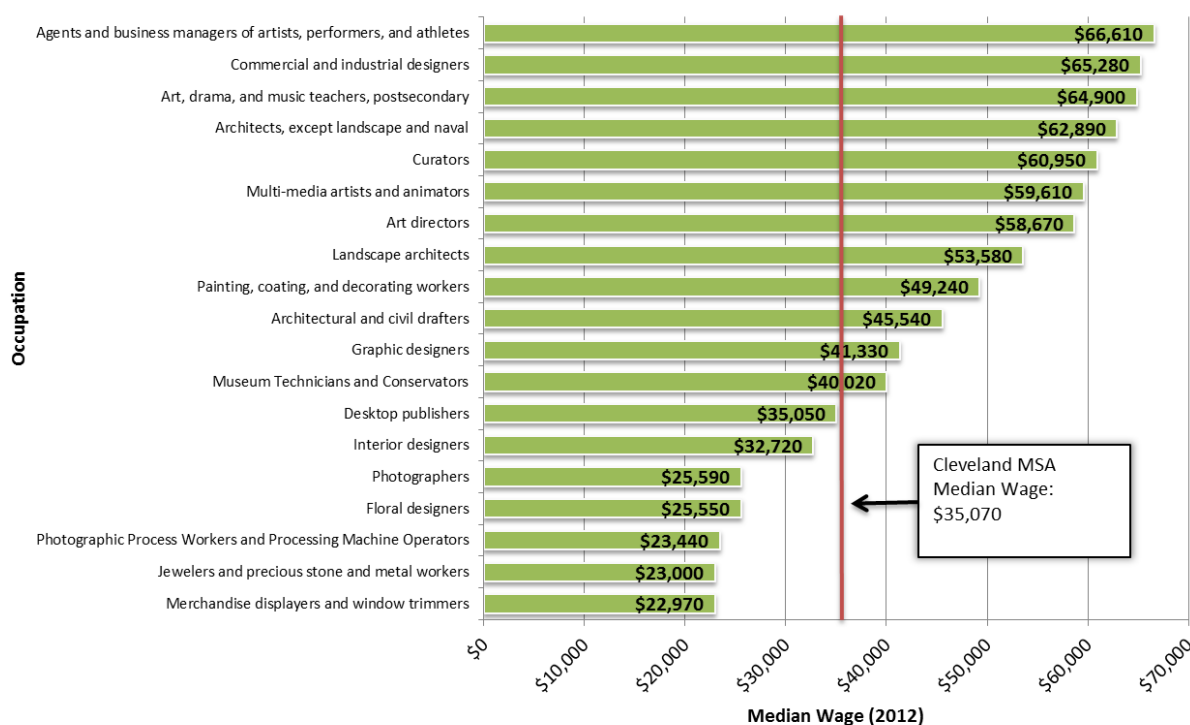
Source: Bureau of Labor Statistics, Occupational Employment Statistics
Occupational data from Quarterly Census of Employment and Wages

The data show counts of visual artists as slightly declining from 7,585 in 2006 to 6,884 in 2012. In 2012, there were 1,530 people employed as *Graphic Designers*, the largest employment level of all occupations in the Cleveland MSA. This occupation is closely followed by *Art, Drama, and Music teachers, postsecondary*, with 1,290 individuals.¹⁶ Additionally, *Architects, except Landscape and Naval* are above 500 jobs. Ultimately, the top three occupations out of 27 hold a 48.7% share of all occupations.¹⁷ This number reinforces the VACD's structure as defined in this study: about half of the occupations of the visual artists in Cuyahoga County are employed as teachers, architects, or graphic designers – occupations that are usually employed by schools, industrial, and commercial sectors of the economy.

Moreover, the study found that the most well-represented VACD occupations pay average wages that are almost twice as high as the Cleveland MSA's median wage for all industries (Figure VI). *Agents and business managers of artists, performers, and athletes* had the highest median wage in 2012 (\$66,610); however, these wages are attributable to all artists rather than solely to the visual artists. *Commercial and industrial designers* is the second-highest pay occupational category of visual arts (\$65,280) and *Architects* follow them (\$62,890). The latter two are the largest occupational groups of the Cleveland VACD sector.

¹⁶ The data within this occupation include not only VACD-related teachers, but also music and drama teachers. Occupational statistics prohibit obtaining data specifically on VACD-related teachers within this category.

¹⁷ For a complete listing of VACD employment by occupation by year for the Cleveland MSA see Appendix Table A.12 at the completed report of this study.

Figure VI: VACD Median Wage, Cleveland MSA, 2012

Note: Wages in 2012 dollars.

Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

The data analysis of the VACD sector sheds light on the broader industrial base of visual arts deployment. It also illustrates an opportunity for these industrial sectors and art occupations to contribute to regional economic growth through art-based invention and innovation. The significant overrepresentation of some art-related industries in Cleveland also suggests the existence of untapped talent that can be realized by growing the local customer base and strengthening exports to new markets. These sectors need to attract people in the county not actively involved in the local art scene, in addition to broadening the sector's customer base nationally and internationally by selling products outside of Cuyahoga County.

COMMERCE OF THE VISUAL ARTS

For a more comprehensive understanding of the industrial and occupational analyses, the study also examined the sector's supply and demand relationship, as well as its importing and exporting capacity. Through these mechanisms, the true vitality of the sector is exposed. Furthermore, through surveys, in-person interviews, and focus groups, the team not only examined the supply and demand of the artists, crafters, and designers, but also of traded art products.

Survey responses revealed local artists' perceptions of the supply and demand of the Cleveland VACD sector as a complex phenomenon. Data analysis indicates a large supply of artists paired with small demand for arts in Cuyahoga County, and these facts need closer examination. Many of those interviewed by the Center stated there was a large network of buyers in Cleveland who spent a sizeable amount of money on art, but not necessarily on local art. Additionally, many artists believed that art

patrons often sought to purchase art from a Chicago or New York artist at twice the price of local artists because it was “from Chicago” or “from New York.” However, art consumers interviewed for the study pointed out that the Cleveland visual art market offered high quality art that could be purchased at a low cost. All active participants of this sector were quick to admit that those not immersed in the Cleveland art scene fail to see its depth and quality, and, therefore, do not appreciate or purchase it as readily.

The Center also observed the supply of artists entering the workforce as approximated by degrees conferred by local colleges and universities. As shown in Table I, colleges and universities granted 410 degrees in the arts (music degrees are included in some cases) in 2012, from associate to doctoral degrees. This variety of degrees and programming is an asset to the Cuyahoga County’s workforce development system and important for replacing artists who leave the workforce due to exit and retirement. The Survey of Visual Artists reinforced the importance of having a steady stream of young artists in the VACD sector, as a majority of respondents to the survey, both amateurs and professionals, reported they had been creating art for more than 20 years. This statistic indicates most artists were on the mature side of the production cycle, creating a crucial need for a pipeline of new artists entering the workforce to sustain the local VACD sector.¹⁸

Table I. Degrees Conferred in Art in Cuyahoga County, 2008-2012

College/University	City of College/University	Degree Conferred	2008	2009	2010	2011	2012
Baldwin-Wallace College* (now Baldwin Wallace Univ.)	Berea	Master	0	65	55	0	0
		Bachelor	69	285	253	70	75
		Associate	0	7	1	0	0
Case Western Reserve University*	Cleveland	Doctorate	2	5	0	0	0
		Master	19	20	26	10	20
		Bachelor	26	35	32	31	28
Cleveland Institute of Art	Cleveland	Bachelor	70	108	119	80	88
Cleveland State University*	Cleveland	Master	11	10	18	18	17
		Bachelor	71	92	92	97	82
Cuyahoga Community College*	Cleveland	Associate	55	45	42	60	54
John Carroll University*	Cleveland	Bachelor	5	5	4	1	1
Notre Dame College*	Cleveland	Bachelor	4	1	2	1	6
Virginia Marti College of Fashion and Art	Lakewood	Associate	59	44	38	33	39
TOTAL (% of All Degrees Conferred)	-	All Degrees Conferred	391 (3.9%)	722 (7.0%)	682 (6.2%)	401 (3.5%)	410 (3.6%)

Note: * Art and Music degrees conferred

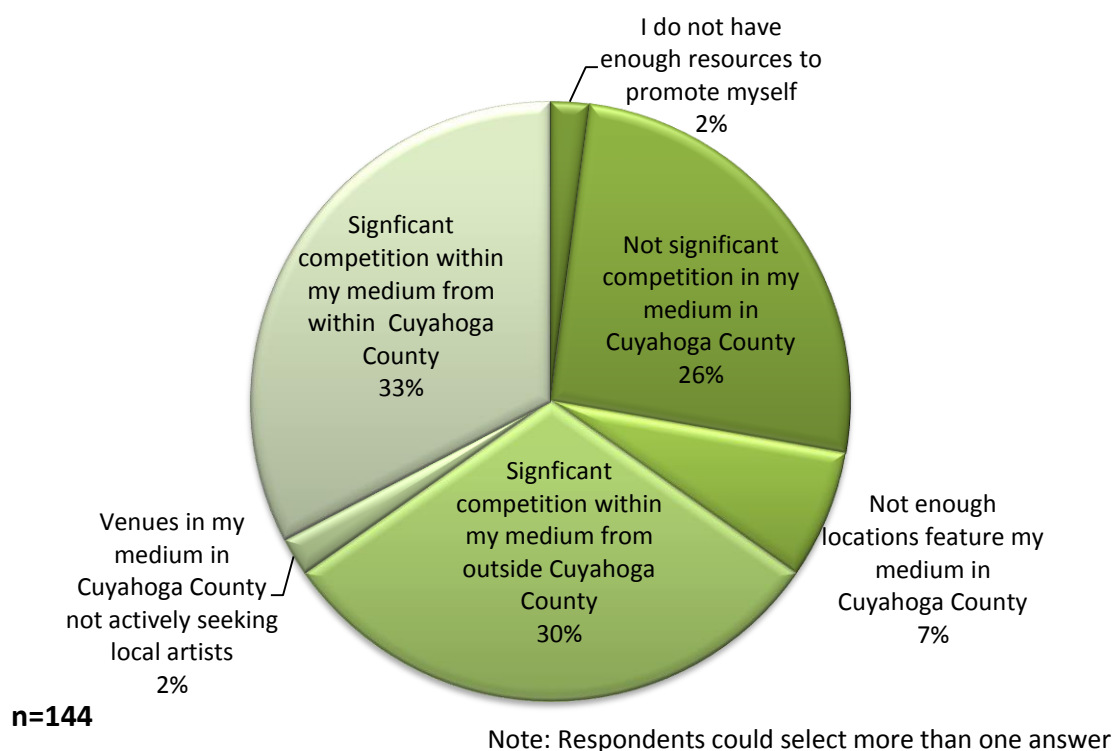
Source: National Center for Education Statistics

¹⁸ There is also a hypothesis of a self-selection bias where older artists had less hesitation to answer the survey feeling confident and well-established while younger artists passed the opportunity to answer survey questions counting their opinion as insignificant.

However, based on surveys, interviews, and focus groups, some artists faced challenges finding their place in the local art scene. Some focus group participants indicated that although young artists have a desire to stay in the Cleveland area after graduation to contribute to positive changes in the region, they confront obstacles when trying to break through the local “guild mentality” in the regional art scene. Nonetheless, these budding artists want their voices heard and have the ability to achieve their personal goals. Moreover, many young artists spoke of their desire to be active in their community through creating art and expressing themselves. Ultimately, increased efforts are needed to link young and new artists with other artists and buyers of art, and policies should be created that encourage new graduates in the Cleveland area to stay local.

While encouraging new artists to stay in the area has proved somewhat difficult, many artists maintain that they experience significant competition from within Cuyahoga County, as the Survey of Art Fairs and Festivals reveals (Figure VII). Specifically, 33% of respondents sensed competition existed from inside Cuyahoga County, and 30% of respondents believed competition existed from outside of Cuyahoga County. These responses support the observations espoused during the interviews and focus groups—that a large supply of artists exist in the Greater Cleveland area. Again, these findings emphasize a need to broaden the local arts market to create greater economic benefits for the region.

Figure VII. Artists’ Perception of Competition in Medium by Location



Source: Survey of Art Fairs and Festivals

The research team also estimated the supply of art by analyzing the ratio of VACD establishments per 10,000 persons in the region. The Cleveland MSA has the second-highest number of establishments per 10,000 of population (4.46) after Cincinnati (5.17), surpassing Columbus, Indianapolis, and Pittsburgh (Table II).¹⁹ This large number of art establishments indirectly confirms an earlier finding regarding the significant supply of arts and art-related products in the region. Moreover, this figure shows the potential for broadening the local art demand by widening geography and deepening the demand for previously untapped market niches. The small population-to-establishment ratio affirms the breadth of art product supply in the region. The Cleveland MSA has the second smallest ratio among the MSAs (2,241 residents to one establishment) compared to the Cincinnati, Columbus, Pittsburgh, and Indianapolis metropolitan areas. These results signify that there are less people creating potential demand for every art establishment in the Cleveland MSA compared to the other regions. The relatively small number of people per art establishment is even more problematic if people are not well informed about the variety and quality of local art—another challenge noted by some focus group participants.

Table II. Ratio of Persons per VACD Establishment by Comparable MSA, 2010

	Metropolitan Statistical Area (MSA)				
	Cleveland, OH	Cincinnati, OH	Columbus, OH	Indianapolis, IN	Pittsburgh, PA
Population	2,077,240	1,625,406	1,836,536	1,756,241	2,356,285
No. of Establishments	927	841	691	745	885
Ratio (Persons per Establishment)	2,241	1,933	2,658	2,357	2,662

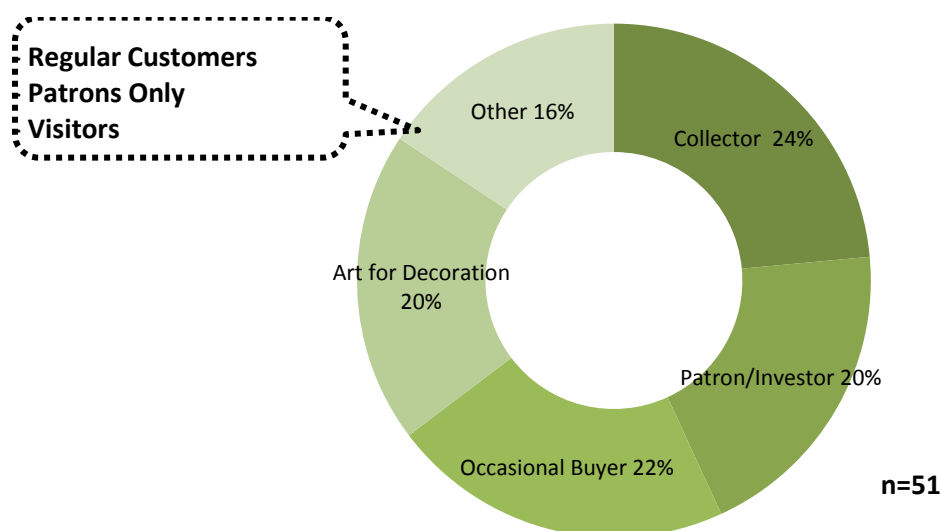
Note: Total Population; Establishments derived from primary VACD NAICS only

Sources: U.S. Bureau of the Census, Decennial Census; U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

While examining further mechanisms of the art market, we asked owners of galleries and shops to describe their customers by art enthusiast type: *Collector*, *Patron/Investor*, *Occasional Buyer*, *Art for Decoration*, and *Other*. Overall, responses split almost equally, practically one fifth to each category, with *Collectors* leading the list as the largest category (24%) (Figure VIII). These results indicate a desirable diversity in the customer base, pointing to a well-rounded regional demand for art and signifying the important role art plays in social life. They also suggest that strategies aimed at increasing demand for art should take the diversity of buyers into account and thus design programs to appeal to the various types of art buyers.

¹⁹ This indicator is calculated as number of establishments/(population/10,000).

Figure VIII. Description of Customer Base



Note: Respondents could select more than one answer
 Source: Survey of Art Galleries

An important component of the supply and demand structure is the region's import and export of the visual arts. Arts are imported into the region in various ways, predominantly through art purchases by large corporations and major institutions. For example, Progressive Insurance, headquartered in Mayfield Heights, has a collection of more than 7,500 pieces, including works from across the globe, which makes it one of the largest collections of its kind in the world. However, the crown jewel of the visual art world in Cleveland is undoubtedly the Cleveland Museum of Art. The museum opened in 1916 and, in its almost 100-year history, has amassed a collection of almost 45,000 pieces covering 6,000 years of artwork.²⁰ While this report focuses on local businesses buying artwork from local artists, the opportunity to market local art to out-of-region corporations and even to international corporate bodies should not be ignored.²¹ While the International Directory of Corporate Art Collectors claims about 1,500 corporations in the world possess art collections, Shirley Reiff Howarth, the editor of the directory, was cited in a recent publication, claiming, "since 2000, the percentage of collections listed as 'ongoing,' or still being added to, has dropped from 55 percent to about 40 percent. Many corporations are limiting new purchases for new buildings, expansions or renovations."²² Therefore, Cuyahoga County artists should actively participate in selling their art to corporations and also develop new means to export it.

The sale of art to large corporations is a profitable, but rare, opportunity for the majority of local artists. Instead, most artists rely on sales during art fairs and shows in- and outside of Cuyahoga County. Selling art in Cuyahoga County requires less travel expenses and provides a bulk of financial support for local artists due to convenience. The average amount of money per local art transaction, however, is smaller when compared to the sales made outside of the region. Figure IX illustrates a comparison of art sold in-

²⁰ See <http://www.clevelandart.org/about/press/general-museum-information> for more details.

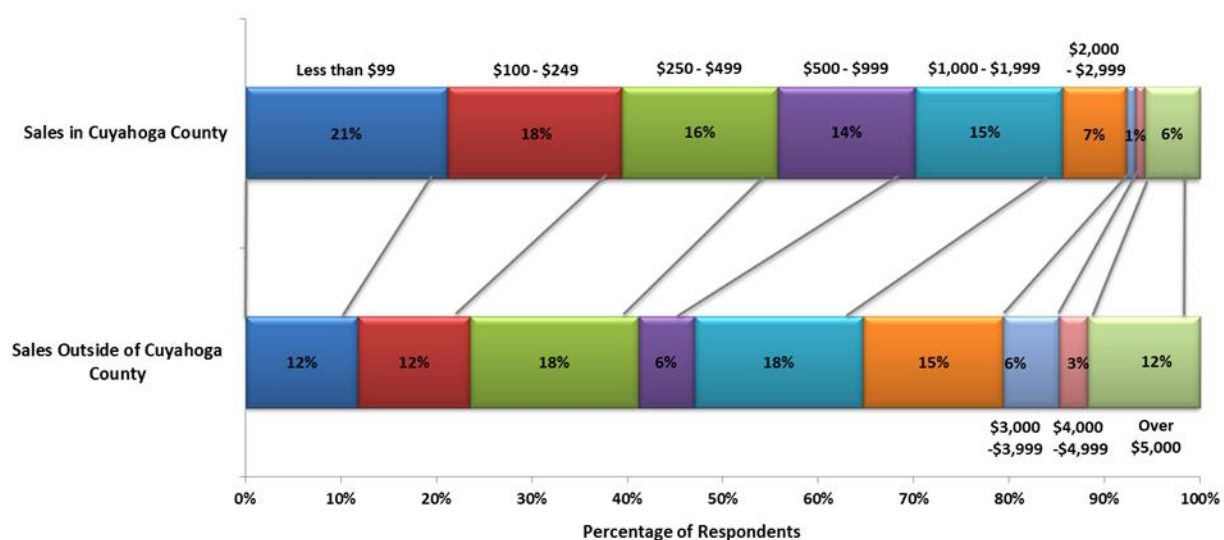
²¹ International Art Alliance is a publisher of the International Directory of Corporate Art Collections. Source: http://www.internationalartalliance.org/selling_art_to_corporations.html.

²² Ula Illytzyk, "Corporations do more to put art on public display." Associated Press, September 6, 2013.

and outside of the region by price bracket. For example, 21% of art in Cuyahoga County is sold for less than \$99, while only 12% of art outside of the region sells for this price. At the same time, only 7% of art sold in Cuyahoga County is in the \$2,000 - \$2,999 price range, while more than twice that (15%) is sold outside of the region.

Exporting art is more profitable; many Cleveland artists sell their products both outside of the region and worldwide. Thirty-eight percent (38%) of artists responding to the Survey of Artists said they sell their work in Cuyahoga County; 13% sold work in Northeast Ohio, 8% in Ohio, 16% in the U.S., and 7% internationally. In addition, the Survey of Visitors at Art Fairs and Festivals reported that 30% of the respondents attended events outside of Cuyahoga County, exporting local art to their hometown. Consequently, this finding implies that local art is more appreciated outside regional boundaries where customers might not possess a bias against “local” art.

Figure IX. Amount of Money Earned Per Art Display, All Respondents

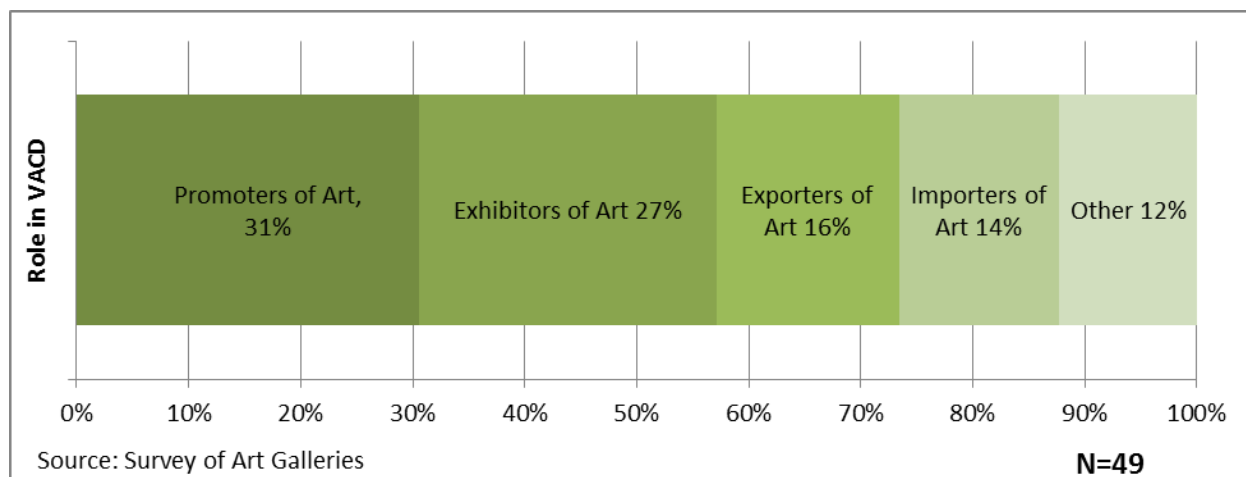


Greater opportunities for art sales outside of the Cuyahoga County region also exist due to the digitalization of the market. The Internet has provided shops and art galleries with both new opportunities and difficulties. These opportunities allow them to reach new consumers across the globe, but also challenge retailers to keep their physical locations open. Shops and galleries play several roles in the VACD sector, with a strong emphasis on the supportive nature of the region’s art community (Figure X). Overall, the research shows that shops and galleries understand what it takes to survive. Sixty-three percent (63%) of respondents saw an increase in sales over the last three years, but for many of them success did not come easy. Some businesses were hit hard during the recession, but experienced growth during the last two years, recovering those losses. The other 40% experienced either flat or declining sales and indicated that it has been a challenging period for art galleries and shops. To build business beyond brick and mortar locations, 62% of galleries and shops use the Internet as a digital marketplace, illustrating the Internet’s increasingly significant role for art consumption.

Regional artists must continue to prioritize quality to facilitate the exportation of their products. When galleries owners were asked if local art quality had improved over the last three years, 70% of

respondents said “Yes.” In all, the region’s VACD sector demonstrates considerable sustainability in both the import and, perhaps more importantly, export of local artwork. These figures are an indirect testament to the well-established character of the sector, its high quality, and continued innovation. Meanwhile, focus group respondents pointed to the challenge that not a single regional gallery is a broker in major international art shows like the Armory Show (New York, NY) or Art Basel (Miami, FL).

Figure X. Role Gallery/Shop Plays in VACD



Both the challenges of digitalization and galleries’ new roles as both art promoters and exhibitors testify to a paradigm shift in the VACD sector similar to the changes experienced by the music sector in the previous decade. However, this shift does not diminish the fact that Cleveland artists are living in a vibrant, exciting, growing, and talented visual art environment (Figure XI) that needs to overcome the obstacles of art supply overcrowding and local buyer underestimation.

Figure XI. Respondent Words to Classify the Arts Scene



ECONOMIC IMPACT OF VISUAL ARTS

The VACD sector is linked to other industries through buy-sell relationships that contribute to the overall economic impact of the sector. To provide goods and services, companies in this sector buy goods and services from other companies both in and outside the VACD sector.

This report measures five impacts of the VACD on Cuyahoga County: employment, labor income, output, value added, and taxes. Employment measures the number of jobs in Ohio due to spending in the sector. Labor income refers to payroll paid to employees plus proprietors' income. Value added measures the value of goods and services less the intermediary goods and represents a portion of output – often referred to as Gross Domestic Product. Output measures the total value of goods and services produced in Cuyahoga County because of spending in the VACD sector. Taxes include federal, state, and local tax revenues.

The spending and employment of the VACD sector assessed for the modeling in 2013 includes 9,707 direct employees, \$478 million in direct employee compensation, and \$993,136 revenue in sales at art events. As a result, the total economic impact of the VACD sector accounted for 17,844 jobs (Table III). Fifty-four percent (54%) of these jobs made a direct effect; in other words, there were 9,707 people directly employed by Cuyahoga County's VACD sector. Another 25% of all impact created in employment constituted the indirect effect. This represents 4,460 jobs in the supply-chain industries of the VACD sector, which are industries that sell their products and services to art industries for the production of visual arts. Lastly, 21% of the total employment impact reflects the induced effect. In other words, 3,677 jobs exist across many sectors and industries due to purchases people make from the salaries they earn either from direct employment in the VACD sector or by being employed in the industries supplying the VACD sector in Cuyahoga County.

**Table III: Economic Impact of the Cleveland VACD Sector
(by Direct, Indirect, and Induced Impacts), 2013**

Impact Type	Employment	Labor Income	Value Added	Output	Tax
Direct Effect	9,707	\$491,254,691	\$760,047,355	\$1,794,410,357	\$135,415,475
Indirect Effect	4,460	\$269,272,489	\$412,907,991	\$639,315,215	\$75,721,066
Induced Effect	3,677	\$174,389,430	\$297,455,644	\$469,642,477	\$62,750,114
Total Effect	17,844	\$934,916,610	\$1,470,410,990	\$2,903,368,049	\$273,886,655

The true economic impact of VACD sector can be assessed by calculating how the rest of the economy will grow if we increase the final demand in the VACD sector by one unit (one job or one dollar of labor income, for example). That is, for each employee that works in the VACD sector, an additional 0.84 jobs are created outside of the sector through the VACD's supply chain and increase in purchasing power of VACD and supply industry employees (induced and indirect effects) (Table IV top line). In other words, for every 10 jobs that exist in the VACD sector, more than eight other jobs exist in other sectors of Cuyahoga County's economy because of the VACD sector. Furthermore, for each employee added in the

VACD sector, there is an additional \$96,428 created in labor income, an additional \$151,725 created in value added, an additional \$299,718 created in output, and an additional \$28,264 created in taxes.

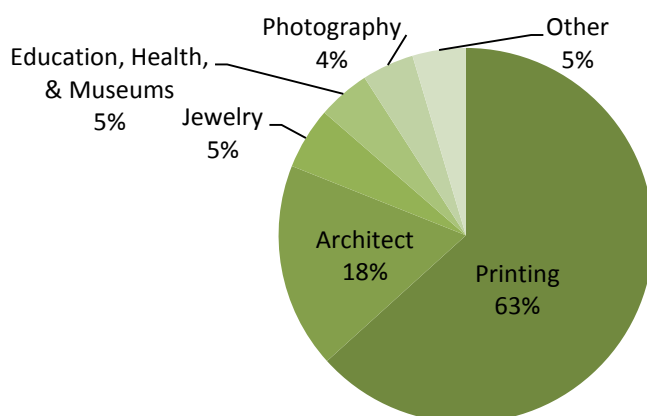
Additionally, for each dollar earned as labor income in the VACD sector, there is an additional \$0.90 created in other sectors. For each dollar in value added, there is an additional \$0.93 created in value added by other sectors of the economy; for each dollar in output, there is an additional \$0.62 created in output; and for each dollar in taxes, there is an additional \$1.02 created in tax impact (Table IV second line).

Table IV: Impact per Employee and per 1\$ of Labor Income

	Employment	Labor Income	Value Added	Output	Tax
Per Employee	1.84	\$96,428	\$151,725	\$299,718	\$28,264
Per 1\$ of Labor Income	0.84	\$0.90	\$0.93	\$0.62	\$1.02

The largest VACD subsector in terms of all measures of total impact (employment, labor income, value added, output, and taxes) was *Printing* (Figure XII), which has the largest employment in this subsector in Cuyahoga County.²³ The *Architects; Jewelry; Photography; and Education, Health, and Museums* subsectors rounded out the top five in terms of total employment impact. The *Glass; Events; Amateur Artists; Metal, Stone, and Wood* subsectors all had an impact of less than 100 employees.

Figure XII: Employment Impact by VACD Subsector, 2012



Other includes: *Amateur Artists; Textiles; Glass; Metal, Stone, & Wood; Artists; and Events.*

²³ Cleveland is a home to a large cluster of printing companies accounting for 173 business establishments. Employment in these companies totals to 5,567 people, including American Greeting, which employs about 2,000 workers alone, according to *The Plain Dealer*, March 26, 2014. (http://www.cleveland.com/business/index.ssf/2014/03/construction_begins_in_april_o.html). Another example is Angstrom Graphics, known in Cleveland by its previous name, St. Eves PIC, which employs 564 people in Cleveland and Florida, according to *Crain's Cleveland Business*. (<http://www.crainscleveland.com/article/20090209/FREE/902069931>). For more information on the *Printing* subsector, see Chapter 1 of the study report, "Typology and Trend Analysis of the Cleveland VACD Sector."

In terms of labor income, *Printing* remains the largest subsector, followed by *Architects*; *Photography*; *Jewelry*; and *Education, Health, and Museums* (Table V). In the value-added impact category, the second-highest was the *Architects* subsector, followed by *Photography*; *Education, Health, and Museums*; and *Amateur Artists*. In output impact, the second-highest category was the *Architects* subsector again, followed by *Photography*; *Education, Health, and Museums*; and *Jewelry*. Finally, in terms of tax impact, *Printing* was the highest subsector, followed by *Architects*; *Jewelry*; *Photography*; and *Education, Health, and Museums*.

Table V: Economic Impact of the Cleveland VACD Sector by Subsector, 2012

Subsector	Employment	Labor Income	Value Added	Output	Tax
Artists	40	\$1,017,240	\$1,557,151	\$3,629,570	\$272,982
Architects	3,165	\$176,736,452	\$248,555,309	\$412,788,499	\$45,943,500
Education, Health, & Museums	808	\$34,059,436	\$62,575,338	\$104,094,599	\$11,093,356
Glass	97	\$5,563,753	\$8,484,188	\$19,144,950	\$1,660,008
Jewelry	953	\$34,435,287	\$57,310,663	\$66,939,322	\$17,210,805
Metal, Stone, & Wood	85	\$4,846,948	\$6,176,487	\$13,690,445	\$1,200,925
Photography	801	\$38,662,126	\$69,409,590	\$170,089,666	\$12,895,627
Printing	11,294	\$621,242,204	\$990,514,721	\$2,073,083,373	\$177,812,398
Textiles	266	\$5,414,748	\$7,927,612	\$8,708,136	\$2,595,362
Amateur Artists	320	\$12,335,405	\$17,060,455	\$29,759,591	\$3,041,396
Events	15	\$603,011	\$839,476	\$1,439,898	\$160,296
Total	17,844	\$934,916,610	\$1,470,410,990	\$2,903,368,049	\$273,886,655

Printing Subsector

The *Printing* subsector had the greatest overall economic impact out of all other categories. The direct employment impact was 5,567 jobs, the indirect employment impact was 3,278 jobs, and the induced employment impact was 2,449 jobs –11,294 jobs in this subsector alone (Table VI). Thus, *Printing* represents 63% of the total employment impact in the VACD subsector.

Additionally, *Printing* represents 66% of the VACD labor income (\$621M), 67% of the value-added impact (\$991M), 71% of the output impact (\$2.1B), and 65% of the tax impact (\$178M). This subsector includes some larger export-based Cuyahoga County employers and represents many small- and medium-sized firms that serve the local population.

Table VI: Economic Impact of Printing Sector

Impact Type	Employment	Labor Income	Value Added	Output	Tax
Direct Effect	5,567	\$302,152,663	\$479,750,581	\$1,276,800,275	\$78,857,571
Indirect Effect	3,278	\$202,963,404	\$312,687,242	\$483,517,841	\$57,169,157
Induced Effect	2,449	\$116,126,137	\$198,076,898	\$312,765,257	\$41,785,670
Total Effect	11,294	\$621,242,204	\$990,514,721	\$2,073,083,373	\$177,812,398

Architecture Subsector

The *Architecture* subsector had the second-largest economic impact in Cuyahoga County. This subsector includes both population-serving and export-based businesses in the county. The direct employment impact was 1,890 jobs, the indirect employment impact was 584 jobs, and the induced employment impact was 691 jobs (Table VII). These subcategories result in a total employment impact of 3,165 jobs for this subsector, which represents 28% of the total employment in the VACD sector.

Additionally, the *Architecture* subsector represents 28% of the VACD labor income (\$177M), 25% of the value-added impact (\$249M), 20% of the output impact (\$413M), and 26% of the tax impact (\$46M).

Table VII: Economic Impact of Architecture Sector

Impact Type	Employment	Labor Income	Value Added	Output	Tax
Direct Effect	1,890	\$111,887,800	\$145,926,036	\$253,318,908	\$25,714,565
Indirect Effect	584	\$32,097,003	\$46,765,284	\$71,261,402	\$8,444,117
Induced Effect	691	\$32,751,649	\$55,863,989	\$88,208,189	\$11,784,818
Total Effect	3,165	\$176,736,452	\$248,555,309	\$412,788,499	\$45,943,500

Although these measures illustrate the significant economic impact of the visual arts, overcoming challenges of the Cleveland VACD sector could lead to even greater economic benefits, adding to the future vitality of the regional visual art scene.

CLEVELAND'S VACD SECTOR CHALLENGES AND OPPORTUNITIES

The Cleveland Visual Arts, Crafts, and Design (VACD) sector study's purpose is to catalyze discussion on the challenges and opportunities facing the VACD, which often go unacknowledged by artists and sector representatives. Cleveland has a significant visual arts history rooted in strong traditions and supported by an institutional base comprised of a myriad of companies and artists. Throughout the last six decades, the city of Cleveland and Cuyahoga County have lost population. The decline of population paired with the latest Great Recession has exacerbated the challenge of a scarce consumer base when compared to the existing visual arts scene.

Nonetheless, Cleveland is a city in transition. Many artists prefer to stay local after graduation and some even move to Cleveland. Many graduates choose Cleveland not only because the city is affordable, but also because they want to play a part in the city's revitalization. This revival touches all areas: the economy, surrounding neighborhoods, and the aesthetics of the city. Artists want to participate in this evolution by harnessing their creative energies to produce art.

Consumer Base Expansion

This study's targeted area is limited to Cuyahoga County, which encompasses studio and applied visual arts, crafts, and design. The biggest challenge identified in the study was the limited consumer base for visual arts products. Multiple venues and events that sell art, including art galleries, shows, and fairs, often compete for the same customers from the region. Many focus group participants mentioned that they see "the same faces" at various art events across the area and depict the limited consumer base as a "competition for audience."

The lack of customers can also be described as an oversupply of visual arts and their products. The quantitative findings support this characterization since the Cleveland's ratio of population per art establishment is the second lowest among comparable regions (see the section of Art Commerce earlier in this executive summary). This figure accounts for the smaller customer base for each art establishment and informs the overall consumer-base shortage in the region. The limited consumer base also stems from the bias against "local" art in the Cuyahoga region, in that many art consumers prefer to make purchases from art-branded cities like New York or Los Angeles. The county's visual art audience needs to be broadened in the local sector by involving residents not currently engaged with the VACD sector or these events, in addition to bringing more tourists into the region.

Various challenges face the VACD sector in expanding the consumer base: art locations are widely dispersed, there is a lack of communication among artists, a need for higher visibility for visual arts in- and outside of the region, and the artist business model does not always coincide with traditional small businesses strategies. Additionally, the Cleveland VACD sector is facing challenges that are characteristic to the sector nationally.

Art Neighborhoods

Cleveland is home to many neighborhoods where artists, community partners, and arts and culture organizations share extensive histories of working together to impact economic and community development outcomes.

The Grassroots Nature and Authenticity of Cleveland's Art Neighborhoods

Cleveland's Tremont neighborhood is one of the first neighborhoods in Cleveland to witness a rebirth through the cultivation and growth of its arts and culture assets – a resurgence decades in the making. Thanks to the creative nature of Tremont's residents and many grassroots efforts, the neighborhood is a crown jewel among Cleveland's many art-based neighborhoods. The neighborhood's success as a true representation of *creative placemaking* is thoroughly discussed the case study, *Tremont: Creative Placekeeping*.

In the early 1980s, low real estate prices created an opportunity for artists to purchase homes and studios in which they could live and work. Later, once Tremont became trendy and, subsequently, more gentrified, it no longer possessed affordable housing or workspaces for artists. Nonetheless, Tremont remains a popular venue for residents who want to be close to downtown, as well as to art and entertainment destinations. Tremont signifies a valuable lesson in art neighborhood sustainability, as multiple comments by focus group participants attest.

To sustain an art neighborhood, collaboration is required from citizens, local government, and grassroots organizations. This collective effort might include considering a unique physical infrastructure that can become an asset for creative businesses – key to art neighborhoods. The capacity and uniqueness of each art neighborhood should be combined with efforts to coordinate assets across neighborhoods and stakeholders, aligning them in a way that will create a continuous experience for visitors. More visibility for the local population and cultural tourists would strengthen these areas as art destinations.

Collaborative efforts are essential to enhancing the regional consumer base through art neighborhoods and should include participation in youth educational programs that develop young residents' taste for art; provide business advice to artists; and coordinate regional artists on art events, shows, community days, and other fairs. Another case study presented in this report, *CAN Journal: Pressing for Change*, represents an example of coordinating efforts among art organizations that has spurred a collective publication and leveraged an economy of scale for marketing within the art sector. While cooperative efforts should be organized, artists also gave a note of caution to avoid "over planning" to such an extent that the nature of the grassroots movement is stymied.

Tremont successfully demonstrated that when neighborhoods focus on their unique assets they not only improve the lives of residents, but, over the long-term, they ultimately produce stronger regional amenities for Cleveland's residents and visitors. Although this neighborhood's development led to some artists having to leave the area due to price increases, this neighborhood experienced revitalization through art. Ultimately, many neighborhoods throughout the city that were once in decline are now recovering because of the region's high density of artists.

Neighborhood Revitalization

Another area experiencing rejuvenation is Cleveland's St. Clair Superior neighborhood, which is making a name for itself by finding value where others see waste. The *St. Clair Superior: Creative Reuse* case study illustrates how empty two-liter soda bottles, unwanted vinyl flooring remnants, discarded sterile packaging material, and abandoned two-story homes are creating a path to revitalization through repurposing thanks to the *Upcycle St. Clair Project*. This renewal exemplifies Cleveland's truly historic

route toward re-establishing itself as one of America's strongest cities. While other cities are still in the planning stages of renewal, Cleveland is putting ideas into action. This city truly embodies "Rust Belt chic": beautiful neighborhood architecture, streets populated with high quality art, and artists who are humble to the point of deprecation, but who are ultimately tough and talented.

One such artist is Scott Colosimo, the primary subject of the *Cleveland CycleWerks: Starting Up* case study says: "I've lived so many places. Cleveland has a unique quality." That "unique quality" is what led him to include "Cleveland" in the name of his business: "For me, there was no other name for the company." Beyond simply capturing the image of the city in his company's name, he wanted to capture the strengths of its people. Colosimo moved back to Cleveland after living in other cities because "no one does anything for themselves [in other cities]," he says. In Cleveland, "we were able to hire good people – people who can actually do things. They can work with computers and their hands."

He moved his business to another young art neighborhood around Gordon Square in the Detroit-Shoreway Neighborhood. The building has more space than Colosimo envisions for his Cleveland operations, so he is hoping to attract other entrepreneurs and innovators into a shared production environment "to rent out space to artists and businesses doing interesting things." He believes the investment in and energy around Gordon Square should help with attracting workers, renters, and customers.

These examples not only illustrate neighborhood revitalization, but also signify the strength of Cleveland's character. Citizens are mobilizing to revitalize the city through the contributions of artists, products sold by vendors, and purchases by art consumers. Cleveland needs to keep this effort strong by creating more opportunities for visual artists, designers, crafters, and architects, in addition to garnering more recognition by the city and other regional governments to secure financial resources to support the VACD sector.

Dispersed Location of the Visual Art Scene

The uniqueness of Cleveland's multiple visual arts neighborhoods is also a challenge. The various separate locations of the visual arts scene create an obstacle for cultural tourists wanting to visit multiple locations but properly oriented to what amenities each neighborhood has to offer. All focus group participants admitted that Cleveland art neighborhoods create a unique flavor, and each should be experienced in a different way. Some participants posited that a central art district would make the VACD sector more accessible to tourists and thus broaden the customer base. However, other participants opposed this idea, arguing that many neighborhoods have overcome this geographic dispersion through "art hops," which provide trolley tours through multiple arts neighborhoods on certain weekends.

Furthermore, case studies in academic literature show the benefits of decentralized art districts like Chicago²⁴ and Silicon Valley.²⁵ These case studies support the view that decentralizing the arts sector

²⁴ Wali, A., Severson, R., & Longoni, M. (2002). Informal arts: Finding cohesion, capacity and other cultural benefits in unexpected places. Chicago: Chicago Center for Arts Policy at Columbia College. & Wali, A., Contractor, N., Green, H., Mason, S., Severson, R., McClure, H., & Ostergaard, J. (2006). Artistic, cultural and social network assets of recent Mexican immigrants in Chicago. In *American Collegiate Schools of Planning Annual Meetings*, Ft. Worth, TX, November.

correlates with expanded participation in the arts. Moreover, Philadelphia—another decentralized visual arts city—demonstrates that “new cultural capacity can stabilize and revitalize neighborhoods without displacing lower income and long-time residents while increasing diversity in participation.”²⁶

To increase the customer base, we must engage the local consumer base and cultural tourists by better informing them about art opportunities. Many know about the famous University Circle – one of the most concentrated square miles of arts and culture in the nation and home to more than 20 artistic and cultural venues, including the Cleveland Museum of Art, Cleveland Museum of Contemporary Art, Cleveland Institute of Art, and Severance Hall²⁷—but it is important to expand cultural horizons beyond the obvious.

Lack of Communication

There are two types of major communication deficiencies in the Cleveland art scene: the lack of communication between visual arts players and organizations and the absence of a collective message regarding the arts scene, locally and beyond. Speaking with the focus group participants uncovered these communication challenges, including the absence of a consistent “Arts” sections in local newspapers. The key word here is “consistent,” as participants emphasized that local newspapers and other printed media select particular art events and gallery openings to highlight but ignore the sector’s depth. On the other hand, a consistent column or section would not only advertise the artwork or event, it would educate the public in visual arts, get people excited about new events, and, ideally, spur broader interest in the local art scene, leading to an expanded audience.

There is also a lack of communication among neighborhoods that goes beyond just coordinating the dates of major art events. Some neighborhoods are better connected to economic development organizations than others and are therefore able to create marketing messages about their art events more efficiently. However, all neighborhoods want to be a part of a larger, multifaceted visual art scene. This extended view of the Cleveland VACD sector could help align neighborhoods through their unique qualities and create a tourist roadmap to increase participation in local arts among both Clevelanders and cultural tourists.

Consequently, the *Collective Arts Network (CAN) Journal* was born from a need for communication and exposure. CAN also realized that the most powerful way for the arts and culture sector to attract attention and elevate the voices of artists and organizations lacking an effective platform for promoting their work was through cooperation (see the “CAN Journal: Pressing for Change” case study in this report).

²⁵ Alvarez, M. (2005). *There's nothing informal about it: Participatory arts within the cultural ecology of Silicon Valley*. San Jose, CA: Cultural Initiatives Silicon Valley. & Moriarty, P. (2004). *Immigrant participatory arts: An insight into community-building in Silicon Valley*. San Jose, CA: Cultural Initiatives Silicon Valley.

²⁶ Stern, M., & Seifert, S. (1998). *Community revitalization and the arts in Philadelphia*. University of Pennsylvania, Social Impact of the Arts Project. & Markusen, A., & Gadwa, A. (2010). Arts and culture in urban or regional planning: A review and research agenda. *Journal of planning education and research*, 29 (3), 379-391.

²⁷ Leif Pettersen. “10 best city art districts around the USA.” Special for USA TODAY. May 9, 2014. Source: <http://www.usatoday.com/story/experience/america/best-of-lists/2014/05/07/10-best-city-art-districts-around-the-usa/8807535/>.

In resolving communication challenges, questions posed by focus groups' participants need to be answered: Who should participate on behalf of neighborhoods in coordination efforts? How can we find a consensus among multiple players that are eager and hungry for customers? Should there be a separate entity created to collectively promote a bigger picture of the sector? Who will fund such an entity? Facing these questions is necessary to overcome not only informational and communication insufficiencies, but also the multiple challenges of a changing art market landscape.

Sector in Transition: Changing Landscape of the Art Market

The visual arts sector needs to adjust to the new realities of the information era to enhance the dissemination of its products. The digital marketplace expands the accessibility of art for people from all over the world. However, digitalization also creates challenges for artists in demanding more time and effort developing skills for producing digital images of their art and sharing them on the Internet. Artists should embrace these opportunities and overcome difficulties by adjusting their marketing and sales techniques. Furthermore, the digital marketplace will also require business models to evolve in terms of how individual artists and galleries mediate between artists and the public.

In addition to adjusting to the digital market, art galleries must also adapt to a new generation of customers who prefer to experience art rather than merely collect it. Broadening access to the visual arts through digitalization expands the concept of public art, which presents yet another challenge for the visual art sector. "Public art" has evolved to include artwork displayed in public places like streets, parks, and public buildings, as well as any art piece accessible online for viewing as a public good. All of these challenges are changing the art market landscape and require new business models and more support opportunities for individual artists.

Digital Products

Although many artists, particularly those working in architectural and computer design fields, welcome the addition of the digital marketplace, some artists remain reluctant to learn new computer skills and integrate digital components into their business models. In focus groups and individual interviews, artists indicated that *creating art* is the main focus for an artist, and that someone else should be responsible for website development, digital marketing and sales, and building a customer base. Nonetheless, artists also indicated that the small scale of their business operations often prevents outsourcing these functions to another person.

Individual artists are not only the ones who need to embrace the growing influence of the digital marketplace. Online sales are also changing the gallery environment, strengthening them as centers of expertise (both online and at the physical location), in addition to evolving them into powerhouses for devoted collectors. Concurrently, the Internet provides access to a broader range of art experiences, which appeals to consumers, especially younger ones who are less likely to buy artwork. Artists and art galleries must make the digital transition to enhance sales and capture the attention of new consumers to succeed economically.

The Small Business of Visual Artists

Digitalization as a means of selling art is not the only challenge confronting artists. Some artists admitted that often they feel uncomfortable selling their products because their work is such a large component

of their identity as individuals and members of society. As one of the focus group participants stated, “Art isn’t a commodity, it’s an experience. It’s about engaging the person and the art.” Subsequently, artists care less about a profiting from sales and more about establishing a name for themselves by engaging people through their artwork.

However, to support their work, artists must secure financing for their business. Part of establishing a viable business involves creating a unique identity for their products, constructing a financial and marketing strategy, and developing a customer base. For Cleveland VACD sector artists, developing a customer base outside of the region is essential due to the small customer base in the region. Furthermore, becoming a successful artist and managing a financially sustainable small business often means diversifying one’s activities across teaching, tutoring, and writing. To augment their art business, artists participate in local and regional mentoring or residency projects, as well as public art projects, to increase earnings and exposure.

An artist is rarely regarded as a small-business owner in the conventional sense. For example, while traditional local small businesses are supported, at least partially, through “Buy Local” marketing campaigns, art-based small businesses are often overlooked. Additionally, artists are regularly asked to donate their art for fundraisers, which undermines their earning potential. In contrast with other small businesses, artwork seems less valuable than other products or services provided by non-art establishments. Moreover, selling donated art pieces through fundraising often dilutes the work’s worth. These financial sustainability challenges need to be addressed by the community to support the visual arts in Cleveland.

Art Galleries

Some art galleries in the Cleveland region and around the country closed their doors due to sector challenges and the Great Recession. With an aging collectors’ population, there are new audiences who want to experience—rather than purchase—high quality art by enjoying it in galleries and museums. Some artists acknowledge this shift and believe that just having their work exposed in an art gallery brings merit.

Some artists only desire public exposure, either through galleries or public places such as restaurants, corporate offices, or retail stores. Meanwhile, other artists are reluctant to exhibit their work in places other than galleries for two main reasons: sometimes it is not possible to exhibit an art piece that requires special installment, lighting, or background; and sometimes artists prefer the cultural capital of an art gallery to other, more overtly commercial, public places.

The Millennial Generation

Digitalization is changing the VACD sector not only in terms of information dissemination, but also due to the preferences of the next generation of customers. The Millennial Generation is a demographic cohort of about 80 million people born between the early 1980s and the early 2000s. Now entering adulthood, they constitute the largest buying power in the economy, or what is referred to as, “the participation economy.” This demographic is characterized by “people [who] are their own medium, their own creation. This generation today is the ‘creative.’ . . . They want to interact. Measure ‘Return to Involvement’ not ‘Return to Investment.’”²⁸ In other words, Millennials prefer to experience art rather than collect it. Even if they want to purchase a piece of art, they want their input reflected in the piece, often asking that specific color, shape, size, and design be to fit their tastes. Taking consumer input into account when creating artwork is a decided challenge to artists whose art is a part of them.

Jeff Fromm and Christine Garton also trace the characteristics of new consumers: “Not willing to be passive consumers any longer, this generation wants to actively participate, co-create, and, most important, be included as partners in the brands they love. Often, the co-creation process begins with the product or service design, includes the customer journey or shopping experience, and is more easily seen [heightens the visibility] in the marketing and social media space closer to the end of the marketing cycle.”²⁹ Visual artists should recognize this shift in the market and adjust to it.

Public Art

Public art became a focus of public policy as a response to the growing need for art exposure. Moreover, public art can become a powerful tool to spur community conversations, redefine the look of a community, and even revitalize a neighborhood.

“Public art in the most traditional sense is the insertion of beautiful and meaningful structures” into public spaces, says Terry Schwarz, director of Kent State University’s Cleveland Urban Design Collaborative (CUDC) and contributor to the “Public Art: Placemaking in Action” case study in this report. Despite public art’s abstract and porous nature, it represents a powerful tool for placemaking by sparking community dialogue, nurturing community potential, and helping residents envision new uses for old spaces.

Corporations and the public have created even greater momentum for public art. These stakeholders desire access to public spaces and want to experience unique art as a public good by displaying artwork in public and private buildings, including, restaurants, hospitals, and retail stores. Furthermore, in focus group discussions, public art projects were identified as financially viable venues for artists. This broader movement toward making art a public good creates certain difficulties. One challenge is reaching a consensus when evaluating public art prior to approving it for public display. Often, artists and the public disagree on the judges who are selected to evaluate public art projects, the amount of power given to a funder of public art, and how provocative or controversial public art should be.

²⁸ “Kevin Roberts: Brands Are Dead. Welcome to the Participation Economy.” Published by Bill George Leadership Team. October 6, 2009. <http://www.billgeorge.org/page/kevin-roberts-brands-are-dead--welcome-to-the-participation-economy>.

²⁹ Jeff Fromm and Christine Garton “Marketing to Millennials: Reach the Largest and Most Influential Generation of Consumers Ever” New York: AMACOM, American Management Association, 2013. P.8

These challenges coincide with another interviewee of the public art case study, Amy Callahan, director of Waterloo Arts (formerly Arts Collinwood). Amy mentioned that she did not want to “pick” at the art while overseeing and watching *Zoetic Walls*³⁰ come to life, a project of ten murals painted by various local, national, and international artists on buildings around Collinwood. “To me, that sort of ends up killing the energy that is so positive,” she says. “I’m OK not loving everything.” The idea of “Not loving everything” often leads to public conversation and debate that can ultimately lead to dialogue among residents about their neighborhood, and, specifically, about reimagining old, forgotten, or otherwise undesirable spaces.

Even if the evaluation of public art was agreeable to all members, compensation for the artist participating in the process remains a difficulty. Artists spend significant time writing proposals, preparing a model, presenting the project, and participating in an approval process which, in the end, might lead to insufficient financial support when compared to the time an artist has spent on the whole process.

All of these challenges affect the visual sector at large and the Cleveland VACD sector in particular, and require a substantial discussion on future public policies for the arts.

Cleveland VACD Sector’s Future

Visual arts are a large part of our daily lives, which are inundated with images not only through museums or private collections, but also through product consumption. Art penetrates our environments and can inspire collective action. Donald Black, Jr., a 33-years-old artist, focused his hybridized photography techniques on exploring issues like foreclosure, father-son relationships, and the racial divide. On the other hand, Mimi Kato, 39, sheds light, quite literally, on the spreading problem of invasive plant species through her photography. Both artists illustrate art-driven activism and heighten social awareness.

Combining everyday objects in unusual ways or looking at the seemingly trivial through a more somber perspective, inspires people to think about new concepts, applications, and markets for stimulating innovation. For the Cleveland VACD sector to continually invent and deploy products in real-life applications, the community needs to understand the challenges the sector faces and have a discussion on what needs to be done to help it.

There is an ongoing effort to redefine the region that has become particularly important as more corporate, academic, and philanthropic voices talk about the kind of “culture shift” that is needed in how our region responds to change. “We’re making the case for why contemporary art matters,” Jill Snyder, MOCA’s Executive Director says in the *MOCA Cleveland: Sturdy, Dynamic, & Stylish* case study. “Artists are visionaries. Contemporary art museums are hubs for creative people.” The new MOCA building “is sort of a laboratory environment that celebrates innovation. . . . Our job in the next few years is to use our role to communicate with the entrepreneurial sector.” The visual arts can powerfully support a plan for the whole region to become a laboratory of innovation.

³⁰ See <http://artscollinwood.org/zoetic-walls/> about this program.

Public Policy for Arts and Culture in Other Cities

To resolve challenges the VACD sector should continue to innovate, and the best way to support this process is learning from the experiences of other visual artists in other metropolises. Many cities, like Cleveland, study their visual art sector and develop various policies and tools to strengthen it by promoting arts and culture, by providing specific services to artists, and by emphasizing public arts to ensure future consumption of art.

Promotion of Arts and Culture by Local Governments

Local governments approach support for arts and culture in a variety of ways. Citywide art funds from dedicated taxes exist in Los Angeles and San Francisco for the funding of both specific public facilities like museums, as well as for grant programs targeted at artists and arts organizations. Other cities and regions look to so-called cultural tax districts, for example, the Cuyahoga Arts & Culture grants, which were funded through a local cigarette excise tax. Most cities engage in public arts programming, whether by commissioning public art projects or supporting cultural events. A few cities subsidize the arts by encouraging residential/professional buildings through land and vacant building renovations. Some cities also engage in cultural plans, or otherwise explicitly include cultural components when undertaking master-planning processes. To meet these needs, larger cities such as New York, Chicago, and Los Angeles have created Cultural Affairs Departments. In smaller jurisdictions like Minneapolis, however, this work is typically found within economic development agencies possessing a broader scope.³¹

City planning departments, though not explicitly linked to arts and culture, are often the source of the regulatory tools that both enable and hamper the evolution of an arts scene. Strict zoning laws, such as those in Minneapolis, inhibit the development of the live/work spaces that are typically associated with artist districts. Additionally, cultural policies are often overlooked, either by accident or misunderstanding, when considering land use. Though many cities devote the majority of their arts and cultural commitments to large institutions, some cities, like San Francisco, have placed an emphasis on neighborhood-based centers.³²

In 2006, the San Francisco Arts Task Force looked at the complex web of agencies and funding for the arts. The Task Force suggested a reconfiguration and consolidation of the arts support system to streamline and coordinate funding. Large cities with big cultural affairs departments require immense budgets. However, smaller cities have taken a more flexible approach, with smaller community partnerships that bring together the public and private sectors able to transcend bureaucratic quagmires and foster arts-driven revitalization.³³

Cleveland, OH

Cuyahoga Arts & Culture (CAC), a political subdivision of Ohio and one of the largest funders of arts and culture in the nation, inspires and strengthens the community by investing in the VACD sector. Thanks to

³¹ Markusen, A., & Gadwa, A. (2010). Arts and culture in urban or regional planning: A review and research agenda. *Journal of planning education and research*, 29(3), 379-391.

³² Markusen, A., & Gadwa, A. (2010). Arts and culture in urban or regional planning: A review and research agenda. *Journal of planning education and research*, 29(3), 379-391.

³³ San Francisco Arts Task Force. (2006). *Findings and recommendations*. San Francisco.

a ten-year tax approval by Cuyahoga County voters in 2006, the organization administers approximately \$15 million a year to arts organizations of all sizes and from all disciplines. According to their website, CAC has invested over \$112 million in 237 arts and culture organizations since 2007. These funds are awarded through various programs and grants, like general operating grants, as well as grants for project support.³⁴ Also, the Creative Culture Grant, a pilot grant program launched in 2013, awards up to \$150,000 for two arts and culture projects that are selected through a community voting process³⁵.

Community Partnership for Arts and Culture (CPAC), a nonprofit service organization dedicated to strengthening, unifying, and connecting the arts and culture sector in Greater Cleveland, has supported individual artists through the Creative Workforce Fellowship program, which is funded through a grant from CAC. This program provides \$20,000 to 20 artists of various disciplines each year.³⁶ To date, 14 craft, 6 design and 34 visual arts Fellowships have been awarded, totaling \$1,080,000.

Portland, OR

Portland's Regional Arts and Culture Council (RACC) derives its funding from a mix of public and private sources.³⁷ The council provides support to local artists and art organizations through various grants, including, general operating grants for arts organizations located within supporting counties, project grants for individual artists and nonprofit organizations, and professional development grants for artists and arts administrators. Other community services are also offered by RACC, like workshops for artists, organization consulting, as well as printed and electronic resources. The council also supports Art Spark, a bimonthly event that provides an opportunity for artists and art supporters to mix, meet, and network³⁸.

Also, *Work for Art*, a fundraising initiative, primarily garners funds through employee charity campaigns at workplaces in Oregon and Southwest Washington.³⁹ These donations are then distributed through a competitive grant program that is administered by the RACC. Over 100 arts organizations received funding through this program, offering a variety of arts-related services and education opportunities. *Work for Art* also provides supporters an "Arts Card" in return for their donations, which offers discounted ticket prices to various art events and performances.

The RACC also supports arts education by funding artist residencies in schools and is currently working on a comprehensive solution to provide arts education to all regional students. The Right Brain Initiative is one such educational program aimed at accomplishing that goal. The Initiative was launched in 2008 to promote "whole brain learning" by providing every K-8 student in the region with access to the arts, regardless of their background.⁴⁰ An arts-integrated learning experience is created through the collaboration of artist, teachers, and The Right Brain Initiative's staff by designing experiences that fit the unique needs of every student. The program involves a community-wide partnership of schools, citizens, private donors, local government, and cultural groups. The RACC is the Initiative's managing partner and funding is drawn from public and private sources throughout the tri-county region.

³⁴ Mission and History of Cuyahoga Arts and Culture, <http://www.cacgrants.org/mission-and-history.php>.

³⁵ Creative Culture Grant, <http://www.cacgrants.org/creative-culture-grants.php>.

³⁶ Creative Workforce Fellowship, <http://www.cultureforward.org/Our-Programs/Fellowship>.

³⁷ *Regional Arts and Culture Council*, <http://www.racc.org/about/about-racc>.

³⁸ See <http://portlandartspark.com/index.php/site/about> for more details.

³⁹ *Work for Art*, <http://workforart.org/index.php/site/about>.

⁴⁰ About the Right Brain Initiative, <http://therightbraininitiative.org/about-the-right-brain-initiative>.

Austin, TX

The City of Austin's Economic Development Department has several arts and culture-related programs through its Cultural Arts Division. The Cultural Development program is part of the Division and aims to support the development of creative industries through planning and other initiatives. One such program is the CreateAustin Cultural Master Plan, a ten-year plan to stimulate Austin's "culture of creativity."⁴¹ The Imagine Austin program invests in Austin's creative culture through supporting "live music, festivals, theater, film, digital media, and new creative art forms,"⁴² There is also the Next Level program, which offers professional development to creative businesses to help them grow and expand their impact on the creative economy,⁴³ and Cultural and Heritage Tourism Resources, which aims to stimulate cultural economic development by growing the consumer base and increasing cultural tourism to "bring new resources to the community."⁴⁴

Other programs within the Cultural Arts Division also seek to provide support and funding for individual artists and art organizations, including the Community Initiatives and Cultural Expansion Programs, which offers various levels of funding.⁴⁵ Yet another initiative in the division is the Creative Ambassador Program, which designates local artists from various creative backgrounds "to represent the city while traveling in promotion of their own artistic endeavors," thereby not only supporting the artist, but also increasing the reputation of Austin as a "weird"⁴⁶ and "creative capital destination," which draws in more tourists, thus helping support the local creative economy.⁴⁷

Philadelphia, PA

Philadelphia's Office of Arts, Culture, and the Creative Economy (OACCE) was re-established in 2008, aiming to support and promote the arts, culture, and creative industries in the city. The office oversees the city's art program, offers policy advice to the mayor, and provides access to grant programs.⁴⁸ The Philadelphia Cultural Fund, a city-funded nonprofit corporation, was established in 1991 by the mayor and city council and "promotes arts and culture as engines of social, educational, and economic development." This nonprofit also provides grants, funded by the city's allocation to the Cultural Fund, to Philadelphia-based arts and cultural organizations.⁴⁹ The Cultural Data Project (CDP) collects arts and culture financial, programmatic and operational data in a standardized online system for use by organizations and researchers.⁵⁰

⁴¹ See <http://austintexas.gov/department/createaustin-cultural-master-plan> for more details.

⁴² Imagine Austin, <http://austintexas.gov/page/creativeeconomy>.

⁴³ See <http://austintexas.gov/department/next-level-program> for more details.

⁴⁴ For more information, see <http://austintexas.gov/department/cultural-and-heritage-tourism-resources>.

⁴⁵ Cultural Arts Division funding, <http://austintexas.gov/department/cultural-funding>.

⁴⁶ *Keep Austin Weird*, see <http://www.KeepAustinWeird.com>.

⁴⁷ Creative ambassadors, <http://austintexas.gov/department/creative-ambassadors>.

⁴⁸ See <http://creativephl.org/about> for more details.

⁴⁹ About the Cultural Fund, Mission, <http://www.philaculturalfund.org/about/mission>.

⁵⁰ See <http://www.culturaldata.org>.

Minneapolis, MN

The Minneapolis Arts Commission, chartered in 1974 with the mission of strengthening the arts and cultural life in the city, stimulates arts development, fosters appreciation and participation in the arts by all citizens, encourages cooperation between artists and arts groups, and, among other things, helps find financial support for the arts. The commission is housed under the city's Department of Community Planning and Economic Development. In 2005 these groups collaboratively created the City of Minneapolis Plan for the Arts, a ten-year strategic plan to define the city's role in supporting the arts.⁵¹ *Art In Public Spaces* works with the Arts Commission in enhancing public spaces with public art, creating more than a dozen public art projects in the city.⁵²

New York City, NY

The New York Foundation for The Arts (NYFA) offers services, programming, and resources to artists and art organizations. NYFA originally only served artists throughout the state, but in 2009 it expanded programs and services nationwide and internationally. NYFA offers fiscal sponsorship through their program Artspire. Artspire enables artists and art organizations to raise funds using NYFA's tax-exempt status as a nonprofit organization.⁵³ NYFA offers three different online resources: NYFA Classifieds, NYFA Source, and NYFA's Business of Art. NYFA Classifieds serves as a resource portal for advertisers and job seekers. NYFA Source is the nation's largest online arts database and offers resources and opportunities for artists. NYFA's Business of Art provides information and guidance to artists concerning practical matters such as attaining financial security and insurance.⁵⁴ NYFA offers professional development through their NYFA Learning program. NYFA Learning also encompasses the Immigrant Artist Program (IAP), which provides professional support to immigrant artists working in the New York metro area.⁵⁵ NYFA also provides unrestricted grants through its Artists' Fellowships program and provides over \$1 million in cash grants.⁵⁶

Chicago, IL

Chicago's Department of Cultural Affairs and Special Events is dedicated to enriching the city's cultural and aesthetic vibrancy. This energetic atmosphere is accomplished by fostering the nonprofit art sector, individual artists, and for-profit arts businesses through various funding means, like the Individual Artist Program, a grant for Chicago-based artists, and the CityArts Program, which helps generate support for nonprofit arts organizations. The department also markets the city's assets and presents free and affordable, high-quality events for residents and tourists. In 2012, the Chicago Cultural Plan was created to lay the framework for the city's role in future cultural and economic growth. The Chicago Public Art Collection includes over 700 art pieces displayed in 150 municipal facilities; the collection also administers the city's Percent for Arts ordinance that helps to enrich public buildings and spaces with professional works of art.⁵⁷

⁵¹ Minneapolis Arts Commission, <http://www.ci.minneapolis.mn.us/dca/mac/index.htm>.

⁵² See <http://www.minneapolismn.gov/dca/> for more details.

⁵³ See [https://www.nyfa.org/Content/Show/Fiscal%20Sponsorship%20\(Artspire\)](https://www.nyfa.org/Content/Show/Fiscal%20Sponsorship%20(Artspire)) for more details.

⁵⁴ See <https://www.nyfa.org/Content/Show/Online%20Resources> for more details.

⁵⁵ NYFA Learning, <https://www.nyfa.org/Content/Show/NYFA%20Learning>.

⁵⁶ NYFA Awards and Grants, <https://www.nyfa.org/Content/Show/Awards%20and%20Grants>.

⁵⁷ See http://www.cityofchicago.org/city/en/depts/dca/provdrs/public_art_program.html for more details.

San Diego, CA

The City of San Diego Commission for Arts and Culture serves in an advisory capacity to the mayor and city council of San Diego. The Commission promotes support for the region's artistic and cultural assets. The Commission annually awards funds to support nonprofit and culture organizations and projects. The funds are awarded through two competitive application processes. The funding comes from the Transient Occupancy Tax (TOT)—levied on individuals who stay overnight in the city's hotels.⁵⁸ The Public Arts program focuses on three areas: managing art owned by the city, integrating art into capital improvement projects, and the inclusion of art and space for cultural use in private development projects.⁵⁹

The City of San Diego Commission for Arts and Culture also has several special initiatives.⁶⁰ The Fall for the Arts program features a month-long spotlight on cultural activities throughout the region. The Survive and Thrive Initiative is a campaign to assist the nonprofit arts and cultural organizations that have survived the economic downturn. The Diversity Initiative encourages those organizations that received funding from the Commission to develop boards and staff that better reflect the demographics of the city.

Cincinnati, OH

ArtsWave is Cincinnati's regional promoter of arts and culture with the goal of creating community, connecting people, and creating vibrant neighborhoods through the arts. The organization also offers services and various sources of funding, like one-time project grants and several recurring "Impact Grants." An annual arts sampler sponsored by the retail giant Macy's also gives citizens and tourists access to three days of free arts events and programming. Special offers and discounts to over fifty arts organizations, restaurants, shops, and more are also provided through the ArtsWave ArtPass.⁶¹

Columbus, OH

The Greater Columbus Arts Council supports and advances the city's culture by providing grants and services for artists and organizations. Existing grant programs provide organizations with technical assistance, operating and project support, and funding that allows organizations to hire performing artists to enhance events. Many grants and programs are also available to artists, including, individual fellowships, networking opportunities, supply and professional development grants, and the ability to participate in an artist exchange program.⁶²

Los Angeles, CA

The City of Los Angeles Department of Cultural Affairs (DCA) generates and support high-quality arts and cultural experiences for Los Angeles residents.⁶³ The DCA Funds projects through four divisions: 1)

⁵⁸ See <http://www.sandiego.gov/arts-culture/funding/index.shtml> for more details.

⁵⁹ Public Art, <http://www.sandiego.gov/arts-culture/publicart/index.shtml>.

⁶⁰ See <http://www.sandiego.gov/arts-culture/initiatives/index.shtml> for more details.

⁶¹ See <http://www.theartswave.org/> for more details.

⁶² See <http://www.gcac.org/> for more details.

⁶³ See <http://www.culturela.org/aboutcad/organization.html> for more details.

Grants Administration Division, 2) Public Arts Division, 3) Community Arts Division—arts instruction for underserved populations, and 4) Marketing and Development Division—arts education.

The Los Angeles Art Show, created by FADA, is the longest-running venue for contemporary, modern, historic, and traditional art in the country.⁶⁴ Also, Arts for LA is a nonprofit organization that advocates greater investments in the arts.⁶⁵ They work to achieve this goal through supporting arts organizations, connecting arts stakeholders, working with public policy makers, supporting arts educational plans in the local schools, and working with citizens to promote the arts.

Service to Artists

Some cities and organizations have a specific focus on supporting arts and culture organizations and individual artists through programs and services, such as databases, workshops or events.

In **Cleveland**, CPAC provides programs and services to support the arts and culture sector. For instance, its Artist in Residence program provides artists access to affordable housing, establishes programs to connect to non-artists in the community, and provides support for supplies and marketing in Cleveland's Collinwood neighborhood.⁶⁶ The Artist as an Entrepreneur Institute (AEI) is an artist-focused course that provides tools to help artists hone their business skills through teaching them about creating an artistic business, marketing, accounting, raising capital, and identifying and developing a brand.⁶⁷ Beyond these programs, CPAC also offers services like the Collaborative Marketing Database, which allows members to strategically target their marketing activities,⁶⁸ and Creative Compass, which is an online resource website where artists can share information, find opportunities and build connections.⁶⁹

In **Minneapolis**, the McKnight Foundation, in partnership with the Walker Arts Center, developed mnartists.org, an online database of Minnesota artists and art organizations. Artists from all disciplines are represented, and the site has become a marketplace and community hub, offering the public a new way of exploring Minnesota's arts scene.

Fostering engagement in the arts, the Arts Council of **Indianapolis** supports artists and art organizations by offering a wide array of programming available to all. The Arts Council awards funding for artists and art organizations through fellowships and grants and also provides technical, marketing, and other business-related services. An online database of over 800 artists from various disciplines and an online calendar of events, performances, and exhibitions are maintained by the council. Public Indianapolis, the city's public art program, is also overseen by the council. In 1995, the Indianapolis Arts Garden was built and now holds over 300 free performances and monthly art exhibits; in 2010, Gallery 925, a public art gallery, was created to highlight local, contemporary artists.⁷⁰

The Lower Manhattan Cultural Council (LMCC) in **New York City** provides artists with networks, resources, and support to help create vibrant communities in Lower Manhattan.⁷¹ LMCC is dedicated to

⁶⁴ About the Show, <http://www.laartshow.com/about-the-show>.

⁶⁵ See <http://www.artsforla.org/frequently-asked-questions> for more details.

⁶⁶ Artist in Residence, <http://www.cultureforward.org/Our-Programs/Residence>.

⁶⁷ See more at <http://www.cultureforward.org/Our-Programs/AEI>.

⁶⁸ Collaborative Marketing Database, <http://cultureforward.org/Our-Programs/Collaborative>.

⁶⁹ Creative Compass, <http://mycreativecompass.org>.

⁷⁰ See <https://www.indyarts.org/history> for more details.

⁷¹ See <http://www.lmcc.net/> for more details.

“advancing artists, transforming audiences, and catalyzing communities.”⁷² LMCC’s Manhattan Arts Grants program provides financial support to artists and community organizations to connect with their audiences in exhibition halls, classrooms, public spaces, and more. The Artist Residences programs offers support to artists by providing work space. LMCC also offers public and professional development programs.

The Brooklyn Arts Council connects with all players in their arts community. The Council provides programs and services to artists, audiences, participants, venues, educators, and supporters.⁷³ The Council provides grants and free and affordable arts events, in addition to training artists and professionals, teaching students, and developing new projects.

The **Los Angeles** County Arts Commission “provides leadership in cultural services for the County, including information and resources for the community, artists, educators, arts organizations, and municipalities.”⁷⁴ The Commission sponsors special events, provides grants, and offers professional development programs and programs for educators and students. The Commission contracts arts organizations through the Organizational Grant Program (OGP) to provide arts services.⁷⁵ The Commission also has a Civic Art program to implement civic arts projects for a variety of county facilities. The Civic Art Policy allocates one percent of design and construction costs on new county capital projects to a Civic Art Special Fund.⁷⁶

Public Art Funding Programs

While public art is becoming a major focus of the visual arts within cities’ public policies, the funding of these programs and their content differ. Recognizing the value of public art, **Portland**’s Regional Arts and Culture Council helps to acquire and maintain community-owned art in public spaces through public-private partnerships. Both Portland and Multnomah County have Percent-for-Art ordinances that require 2% of publicly-funded capital projects to be spent on the creation and maintenance of public art.⁷⁷ The RACC helps identify/connect artists to these opportunities, in addition to providing a database of public art projects, a public art gallery in downtown Portland, and a public art walking tour.

Austin also recognizes the importance of public art through its Art in Public Places (AIPP) program, which requires that 2% of eligible capital improvement projects’ budgets go toward the purchase and inclusion of public works of art; it was the first city in Texas to adopt such an ordinance.⁷⁸ The City of Austin also maintains public exhibition space at City Hall called the People’s Gallery. In February, the city kicks off a yearly exhibit that showcases regional artists in the People’s Gallery, and, every year, the artwork that wins the People’s Choice award is purchased by the city and added to City Hall’s permanent collection.⁷⁹

⁷² About LMCC, <http://www.lmcc.net/about>.

⁷³ See <http://www.brooklynartscouncil.org/about> for more details.

⁷⁴ About the Commission, <http://www.lacountyarts.org/about.html>.

⁷⁵ Grants and Professional Development, <http://www.lacountyarts.org/grants.html>.

⁷⁶ About Civic Art, http://www.lacountyarts.org/civicart_about.htm.

⁷⁷ See <http://www.racc.org/public-art/overview-opportunities> for more details.

⁷⁸ See <http://austintexas.gov/department/art-in-public-places> for more details.

⁷⁹ The People’s Gallery, <http://austintexas.gov/department/peoples-gallery>.

Philadelphia promotes art at City Hall through its public art gallery, holding exhibitions that feature local artists.⁸⁰ The city's Percent for Arts program also provides 1% of the total dollar amount of any city-funded construction project to fine arts. This applies to city construction and remodeling projects, as well as to developers using land assembled and acquired by the city's redevelopment agency. The program was established in 1959, the first such program in America, and has helped with the installation of over 400 public art projects.⁸¹

Possibly one of the most well-known arts programs, the Philadelphia's Mural Arts Program was created in 1984 with the goal of transforming public spaces and improving individual lives with the mantra, "Art Saves Lives." Originally created as part of Philadelphia's Anti-Graffiti Network, Jane Goldman, the muralist hired to spearhead the program, worked with local graffiti artists after recognizing their raw talent and helped them refine their skills to beautify their neighborhoods. In 1996, the effort was reorganized into the Mural Arts Program with Director Jane Goldman. Goldman then started a nonprofit organization to advocate and raise funds for the program. Since the program began, over 3,600 murals have been created, helping to reactivate and beautify public spaces, which established **Philadelphia** as the "City of Murals."⁸²

CITYarts in **New York City** is a program that brings youth and professional artists together in effort to transform communities by creating public art. Since 1968, CITYarts has produced 287 public arts projects in collaboration with over 500 artists, 100,000 city youth, and almost 500,000 community volunteers. CITYarts has five programs: Young Minds Build Bridges, an art education program that focuses on relationship among youth worldwide; Community Identity, a neighborhood revitalization program; Kids for Justice, an arts education program aimed to reach at-risk youth; and Tribute to New York & New Yorkers, a program in response to the event of 9/11 that promotes New York pride. Finally, Window of Opportunity is a program that identifies artistically talented youth and connects them with professional artists.⁸³

The New York Department of Cultural Affairs (DCLA) represents and serves nonprofit cultural organizations involved in the visual, literary, and performing arts, as well as public institutions and creative artists within the five boroughs of New York.⁸⁴ DCLA's Materials for the Arts Program provides free supplies for use in arts programs offered by nonprofit groups and public schools. DCLA's Percent for Art program has changed the landscape of the city by commissioning over 180 works of art at public building sites throughout the city.

In the public realm, the City of Cleveland also has several initiatives that help support the arts. The city's Arts and Culture Division runs a program called Mural My Neighborhood that connects young Cleveland artists with professional muralists, businessmen, and community leaders to help create uplifting civic murals in several city wards.⁸⁵ The city also has an ordinance that requires 1.5% of the budget for city projects over \$300,000 to go toward public art.⁸⁶ The Greater Cleveland Regional Transit Agency

⁸⁰ See <http://creativephl.org/> for more details.

⁸¹ See <http://www.phila.gov/prg/percentForArt.html> for more details.

⁸² History, <http://www.muralarts.org/about/history>.

⁸³ See <http://www.cityarts.org/about> for more details.

⁸⁴ About Cultural Affairs, <http://www.nyc.gov/html/dcla/html/about/about.shtml>.

⁸⁵ Mural My Neighborhood, <http://portal.cleveland-oh.gov/CityofCleveland/Home/Government/CityAgencies/ParksRecreationandProperties/Cultural%20Arts>.

⁸⁶ Read more at http://planning.city.cleveland.oh.us/cwp/art_trend.php.

(GCRTA) also supports public art through its Arts in Transit program. Established in 1991, the program sets aside 1% of its projects budget towards public art, leading to the installation of over 20 works of art at GCRTA rail stations and transit centers.⁸⁷

While all of the programs and policies offered in other cities illustrate the state of art and culture support programs on a national scale, we offer specific recommendations to strengthen the Cleveland VACD sector.

Recommendations to the Cleveland VACD Sector

To tap into the visual arts assets in Cleveland, policy changes are required. These modifications should be directed at both overcoming the deficits that exist in the local visual arts market while simultaneously taking advantage of the various factors that have created Cleveland's distinctive visual arts scene.

Stimulating Local Demand and Growing Pool of Customers

There is a need to improve an identified deficit of customers by stimulating local and near-local regional demand for the arts among the population in commuting distance of Cleveland. Local supply outweighs local demand, and research has shown that efforts to create external demand through tourism are very often costly and ineffective. Even in studies of well-known destinations like New York and Los Angeles, the vast majority (80%) of art institution attendees were local residents from the county.⁸⁸ The best source of demand stems from the local population itself and the best recognized method for increasing local demand for the visual arts is to ensure early exposure during childhood through school and community-based programs.⁸⁹ Many other cities are growing their future art demand through educational program to children. Besides the future benefits for the VACD sector, children receiving art instruction as part of their education have greater success in reading, math, critical thinking, and social skills, and are more likely to stay in school.⁹⁰ According to a recent study of the Arts Education Partnership, "Arts education develops students' critical thinking skills—including skills for comparing, hypothesizing, critiquing, and exploring multiple and alternative viewpoints."⁹¹ Arts education helps students become better readers and writers: "Drama instruction, for example, increases reading

⁸⁷ Arts in Transit, <http://www.riderta.com/programs/artsintransit>.

⁸⁸ Markusen, A., & Gadwa, A. (2010). Arts and culture in urban or regional planning: A review and research agenda. *Journal of Planning Education Research*, 29 no. 3 379-391.

⁸⁹ McCarthy, K. F., Ondaatje, E. H., Brooks, A., & Szanto, A. A portrait of the visual arts: Meeting the challenges of a new era. RAND Corporation: 2005, 150p.

⁹⁰ Preparing Students for the Next America. The Benefits of an Arts Education. The Arts Education Partnership. 2013. <http://www.aep-arts.org/wp-content/uploads/2013/04/Preparing-Students-for-the-Next-America-FINAL.pdf> Vaughn, Kathryn (2002), "Music and Mathematics: Modest Support for the Oft-Claimed Relationship." In R. Deasy (Ed.), *Critical Links: Learning in the Arts and Student Achievement and Social Development*, Washington, DC: AEP.

⁹¹ Cited in the report Preparing Students for the Next America. The Benefits of an Arts Education. The Arts Education Partnership. 2013. <http://www.aep-arts.org/wp-content/uploads/2013/04/Preparing-Students-for-the-Next-America-FINAL.pdf> with references to Heath, S. B., Soep, E., & Roach A. (1998). Living the arts through language-learning: A report on community-based youth organizations. American for the Arts Monographs, 2 and Montgomerie, D., & Ferguson, J. (1999). Bears don't need phonics: An examination of the role of drama in laying the foundations for critical thinking in the reading process. Research in Drama Education. *The Journal of Applied Theatre and Performance*, 4(1), 11 - 20. - See more at: <http://www.artsedsearch.org/summaries/bears-don-t-need-phonics-an-examination-of-the-role-of-drama-in-laying-the-foundations-for-critical-thinking-in-the-reading-process#sthash.SDg7uBRC.dpuf>.

readiness and word fluency in early grades and continues to improve reading comprehension and writing skills throughout middle and high school.”⁹² Integrating arts into math instruction “also facilitates mastery of computation and estimation skills, and challenging concepts like fractions,” according to the reports by Kinney et al (2005) and Courey et al (2012).⁹³

Support for artists’ and art organizations’ acquisition of digital skills for sales and marketing, developing a customer base, and promoting their artwork to a broader audience is necessary. Embracing new media to interact with the audience is critical in responding to the public’s desire for experiencing the arts. A wider appeal to the local public and private leadership in recognition of individual artists and their work as local small businesses would help enhance the VACD sector by promoting locally made goods and enlarging the customer base.

Developing a vision is an important part of integrating the arts into regional strategic planning. In Arizona, for example, a strategic plan established goals promoting community access, living wages for artists, high quality arts primary education, as well as elevating cultural programs and organizations to societal cornerstones and recognizing that the arts are vital to economic viability and quality of life.⁹⁴ Beyond a regional strategy, the continued development of Cleveland arts districts like The District of Design, and the establishment of more community art walks, like Tremont’s ArtWalk, will help strengthen the local arts and culture sector. Cleveland can also promote the temporary use of unoccupied retail space for art displays, adaptively reuse existing structures for arts and culture facilities, install rotating art displays in businesses and in public places, share performing art and other facilities, develop rosters of artists for developers to use for public art, and encourage artists and businesses to share skills and talents.

Encouraging Asset-Based Development

Cleveland should continue to avoid the strategy that some cities and regions make of creating artificial clustering of the arts. The Cleveland VACD sector is represented by many unique, authentic, grassroots-driven art neighborhoods that have reinvigorated themselves. Efforts to centralize art is often done in an attempt to draw in tourists, which, as mentioned previously, has limited benefits. Research has also found that centralized districts tend to have a less equitable impact on the community. The “decentralized mosaic”⁹⁵ form, as recognized by Markusen, manifests in Cleveland through neighborhood-focused creative scenes, which tend to promote equity and enhance social life, while organically addressing the market’s needs.⁹⁵

⁹² Podlozny, A. (2000). Strengthening verbal skills through the use of classroom drama: A clear link. *Journal of Aesthetic Education*, 34(3-4), 239-276 and Walker, E., Tabone, C. & Weltsek, G. (2011). When achievement data meet drama and arts integration. *Language Arts*, 88(5), 365-372. - See more at: <http://www.artsedsearch.org/summaries/when-achievement-data-meet-drama-and-arts-integration#sthash.2C1LXAfy.dpuf>.

⁹³ Courey, S. J., Balogh, E., Siker, J. R., & Paik, J. (2012). Academic music: music instruction to engage third-grade students in learning basic fraction concepts. *Educational Studies in Mathematics*, 81, 251-278 and Kinney, D. W., & Forsythe, J. L. (2005). The effects of the arts IMPACT curriculum upon student performance on the Ohio fourth-grade proficiency test. *Bulletin of the Council for Research in Music Education*, 164, 35-48.

⁹⁴ See http://www.aztownhall.org/Resources/Documents/98th_Full_Report.pdf [for more examples of Arizona art strategies.](#)

⁹⁵ Stern, M. J., & Seifert, S. C. *Cultivating “Natural” Cultural Districts*. Social Impact of the Arts Project. University of Pennsylvania. September 2007. Source: http://www.sp2.upenn.edu/siap/docs/cultural_and_community_revitalization/natural_cultural_districts.pdf.

Additionally, the intimate nature of Cleveland's arts neighborhoods and their ties to residents serve as another method for driving local demand for the arts, through experiential and collecting avenues.

Sustaining and Growing Support

The region has to continue financial and other support for artists in Cuyahoga County. Current programs, such as those that currently exist through Cuyahoga Arts & Culture and the Community Partnership for Arts and Culture, should be fostered and expanded. These programs help maintain a supply of high-quality art and artists in the region, in part, by attracting artists to the region. The supply-side approach is the traditional model for supporting the arts in the U.S. and has been effective, despite criticisms of the practice on equity grounds—specifically that the subsidies end up going to wealthy collectors. Also, support for small arts organizations, many of which are nonprofits, must be maintained to sustain the VACD sector. Support can come in the form of grants and through coordination and marketing assistance. The *CAN Journal*, featured in a case study, is an excellent example of this type of support.

Fostering collaborations and closing communication gap

The report's final recommendation is to create policies that nurture the cooperative character of the visual arts scene in Cleveland so that it continues to welcome and encourage new artists. One way to create these policies is by hosting informal gatherings of artists and patrons where the goal is to create and sustain intra-industry linkages and accumulate social capital that can be leveraged later. This venue could become a great conduit for strengthening ties in the art community to Cleveland's robust industrial base. Such relationships will benefit communities by growing internal corporate demand for art products and, more importantly, demonstrating the potential for spurring creativity, and driving further art-based invention and innovation. This strategy can utilize existing industry products in a new market, to new customers, or, perhaps, create a new product cycle.

Strengthening such collaborative efforts could organically nurture partnerships among art neighborhoods and create better coordination for art events through marketing efforts, generating higher visibility for the people's collective voice in- and outside of Cuyahoga County.

A region that embraces art as public policy bolsters its cultural citizenship. Artistic practice can be a transformative force and reaffirms the importance of the arts in contemporary society. Thoughtful cultural policy benefits artists and audiences; fosters the mystery and courage of the collective aesthetic imagination; and enriches our understanding of the risk, freedom, responsibility, beauty, and poetry in the world.

CHAPTER 1

TYOLOGY AND TREND ANALYSIS OF THE CLEVELAND VACD SECTOR

INTRODUCTION

The analysis of industrial trends within the Cleveland Visual Arts, Craft and Design (VACD) sector has two goals: first, to create a typology of the VACD sector based on classification of visual arts products by industry affiliation, and second, to describe the economic trends of the VACD sector from 2000 to 2012. To achieve these objectives, the U.S. Census Bureau's North American Industry Classification System (NAICS) codes were used in the analyses. For the purpose of this study, the Cleveland VACD sector refers to Cuyahoga County, not just the city of Cleveland. To that end, "Cleveland" and "Cuyahoga County" will be used interchangeably.

METHODOLOGY

The data for this trend analysis derives from a comprehensive database created based on ES202 data (also known as the Quarterly Census of Employment and Wages or QCEW).⁹⁶ Analysis of these data sets illustrates the Cleveland VACD sector structure, the dynamics of the sector as a whole, and its segments from 2000 to 2012. The economic indicators derived from the ES202 database include employment, total wages (or payroll), and the number of establishments.⁹⁷ The ES202 database includes information on 98% of the total employment and wages in the state of Ohio. The data are analyzed and described by industry subsectors, but not by individual company due to confidentiality restrictions associated with the data.

The methodology for conducting the trend analysis included several phases.⁹⁸ In Phase 1 we retrieved VACD-related industries' data from ES202 using definitions derived from a literature review of previous studies (Appendix Tables A.1 – A.4). During Phase 2 a list of key words was developed that point to VACD-related industries (Appendix Table A.5) and conducted a search using these key words to locate specific companies in the ES202 database. Phase 3 included designing comparable data sets at the state and national level. As a result, 114 NAICS industries were identified as those that hold establishments related to the VACD sector in Cleveland (Appendix Table A.6).

As a next step, the two-level typology of the VACD sector was created conceptualizing the sector by functions and mediums.⁹⁹ All the visual-arts related industries (identified by NAICS code) were divided into industry groups representing functional subsectors of the Cleveland VACD Sector (level 1). These

⁹⁶ For more information about the ES202 or QCEW (Quarterly Census of Employment and Wages) program; visit <http://www.bls.gov/cew/>.

⁹⁷ An establishment represents a single physical location where business is conducted or where services or industrial operations are performed. This can be compared with a firm or enterprise which may include multiple establishments. - United States Census Definition

⁹⁸ A detailed methodology of each step is explained in the Appendix Table A.1.

⁹⁹ This by-folded typology emphasizes clusters of industries around visual arts mediums, which is different from *Remix Cleveland* where functions of the subsectors of the music sector were used as a driving device. This methodological change was driven by available data disclosure.

groups were constructed to minimize the need for data suppression mandated by ES202 confidentiality requirements. Of the 114 total NAICS codes, the following 10 subsectors were derived:

- *Architecture & Design*
- *Artists*
- *Education, Health, & Museums*
- *Galleries & Promoters*
- *Glass*
- *Jewelry*
- *Metal, Stone, & Wood*
- *Photography*
- *Printing*
- *Textiles*

For analysis purposes, throughout the report some of the subsectors are combined into a “mediums” category (level 2 of the typology) to signify various artistic mediums (Figure 1).¹⁰⁰ The analysis is structured around main visual art mediums to reflect supply chain and business support environments around of each medium at the same time satisfying data confidentiality restrictions.

Among all functional and medium subsectors, the most industry-diverse was *the Architecture & Design*, which included companies from 44 different 6-digit industrial sectors. These are companies involved in architectural services; interior, industrial and graphic design, wholesale and retail associated with these products; manufacturing and business services related to architectural and design products.

The next most-diverse sector, *Printing*, included 18 industries all related to art printing. These industries are commercial printing and their support activities, manufacturing of professional equipment for printing and manufacturing of support materials (like ink and stationary products), wholesale and retail (both physical and electronic) related to printing, so as periodical publishers and books printing.

All other mediums’ sectors are much less diverse and generally include from 3 to 9 industries, accounting for the production of the core medium’s product, manufacturing of equipment and supplies for that product, related retails and wholesale, and all support services or training if those were unique to the medium.

Three other functional sectors of the typology, are serving all art mediums and *Architecture & Design* subsectors; they are *Education, Health, & Museums*; *Artists*; and *Galleries & Promoters*.

The subsector of *Education, Health, & Museums* accounted to such diverse sectors to fulfill data confidentiality requirement and includes museums, fine arts schools, elementary and secondary schools and educational support services, other training and medical offices that use arts in their treatments.

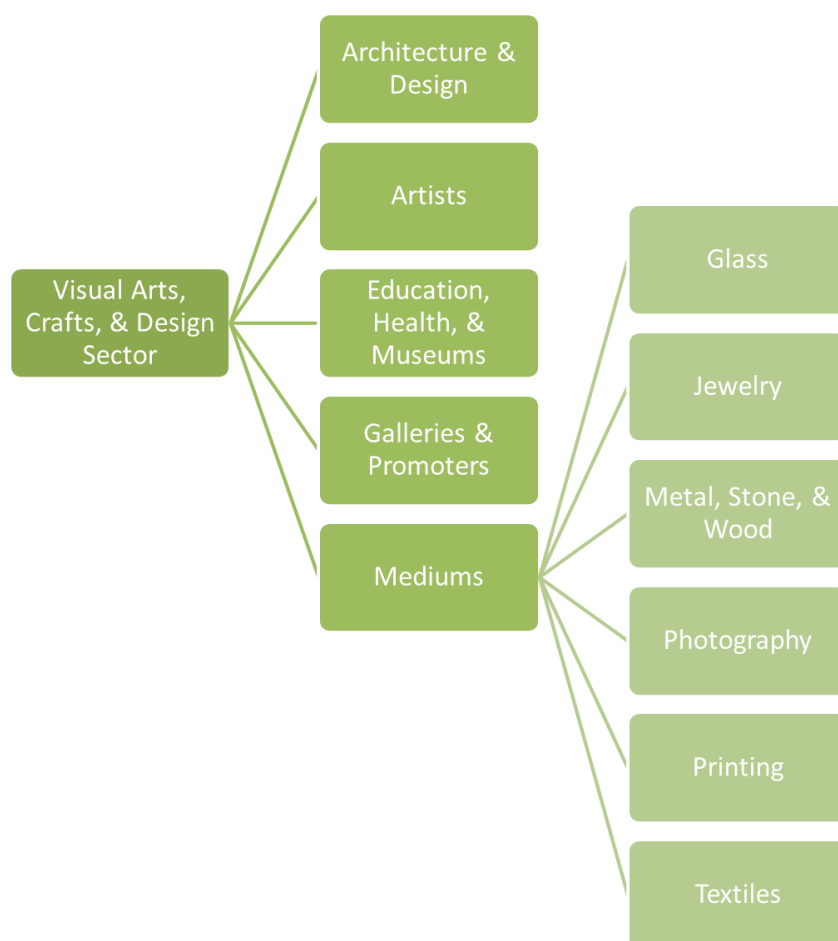
Galleries & Promoters also could not be illustrated separately due to the data confidentiality; this sector includes art dealers, promoters, retail and auctions.

¹⁰⁰ Unlike for music, different mediums require different supplies. For example, supplies for photography or graphic design are quite different from the supplies for jewelry or artistic metal work.

Finally, *Artists* accounted for independent artists and those members of private households that can be treated as artists. These data accounted only for the artists that are not employed in companies falling under all other industrial classifications and we believe is greatly undercounting statistics.

All other detailed industries in the total of 144 that we used in this typology might seem estranged to visual arts but nevertheless was included because some art-related companies carry this NAICS code in Cuyahoga County.¹⁰¹

Figure 1: VACD Industrial Typology¹⁰²



¹⁰¹ The NAICS code is given to every company and business establishment according to the description of its main product. In this case art products could be the result of the ancillary business of a company.

¹⁰² For a detailed list of industries in each subsector, please see Appendix Table A.5.

THE CLEVELAND VISUAL ARTS, CRAFT AND DESIGN SECTOR

This section analyzes the economic trends of the VACD from 2000 to 2012 in Cuyahoga County to show how the sector has changed over time. It traces recent developments that have occurred in the VACD sector, specifically changes from the past two years. Four measures of economic activity were used in this analysis: employment, payroll, average wages, and the number of establishments.¹⁰³

The employment section provides the total number of jobs and accounts for full- and part-time jobs. Total payroll (or wages) shows the scale of the Cleveland VACD and can be viewed as a proxy for value-added output or for total size of the VACD industry. Average wages are calculated as payroll divided by employment; this measure illustrates an average annual wage of a person in a specific industry. The number of establishments accounts for the total number of businesses by location. The dataset for this analysis was derived from the ES202, so it is important to note that ES202 data does not include information for establishments with only one employee;¹⁰⁴ therefore, certain subsectors, like independent artists, may be undercounted. The ES202 database was used to derive statistics for both the State of Ohio and the U.S. VACD sectors indicators.

Employment

In 2012, the Cleveland VACD sector totaled 9,573 employees (Table 1). This sector has declined by 31.4% since the year of 2000 (from 13,946 employees to 9,573); however, between 2011 and 2012 the VACD sector grew 1.7% in Cuyahoga County, while it declined in Ohio (-0.1%) and remained stagnant in the U.S. The 162% increase in the *Artists* subsector (from 9 employees to 23) is the largest increase of all subsectors from 2011 through 2012, although it represents a small sector in employment numbers with only 23 employees in 2012. This change may also be related to the transient nature of artists. This along with *Architecture & Design*, *Glass*, and *Jewelry* (whose employment grew by 16.6%), all factor into the recent overall increase in employment.¹⁰⁵

¹⁰³ Establishments refer to both for-profit and nonprofit entities.

¹⁰⁴ Artists who are self-proprietors are not included in this statistics.

¹⁰⁵ Crain's *Cleveland Business* has also reported that *Architecture & Design* has been doing extremely well in the region, particularly by extending their services to work outside of the city. See: Bullard, Stan. Area architects are drawing business from everywhere. Crain's *Cleveland Business*. August 18, 2013.

<http://www.crainscleveland.com/article/20130818/SUB1/308189984/1072/toc?Profile=1072>

Table 1: VACD Subsectors' Employment, Payroll, Average Wage, and Number of Establishments

Subsector	Employment		Payroll		Average Wage		Number of Establishments	
	2012 Total	2011-2012 Pct. Change	2012 Total	2011-2012 Pct. Change	2012 Average	2011-2012 Pct. Change	2012 Total	2011-2012 Pct. Change
Combined Mediums	7,105	-2.5%	\$347,901,676	3.2%	\$38,804	5.4%	417	-1.7%
Architecture & Design	1,890	16.6%	\$110,017,884	28.6%	\$58,212	10.3%	288	2.9%
Artists ¹⁰⁶	23	162.3%	\$292,200	-15.8%	\$12,704	-67.9%	9	32.5%
Education, Health, and Museums	506	-	\$18,649,700	-	\$36,881	-	13	-
Galleries & Promoters	50	-7.5%	\$1,612,528	5.1%	\$32,467	13.6%	18	12.5%
Glass	51	-	\$2,802,072	-	\$54,586	-	4	-
Jewelry	734	2.8%	\$22,750,704	5.6%	\$31,010	2.7%	135	0.7%
Metal, Stone, & Wood	51	50.1%	\$2,972,460	84.8%	\$57,905	23.1%	7	14.8%
Photography	469	-15.8%	\$18,578,424	-12.9%	\$39,585	3.4%	79	-1.3%
Printing	5,567	-1.9%	\$297,102,960	3.8%	\$53,372	5.8%	173	-2.8%
Textiles	233	-11.0%	\$3,695,056	5.0%	\$15,881	17.9%	19	-17.4%
Total in Cuyahoga County	9,573	1.7%	\$478,473,988	8.8%	\$49,980	7.0%	745	0.8%
Total in Ohio	51,534	-0.1%	\$2,368,643,185	5.1%	\$45,963	5.3%	4,604	-0.5%
Total in U.S.	1,153,557	0.0%	\$53,655,035,318	1.8%	\$46,513	1.8%	166,407	-1.0%

Source: Quarterly Census of Employment and Wages (QCEW)

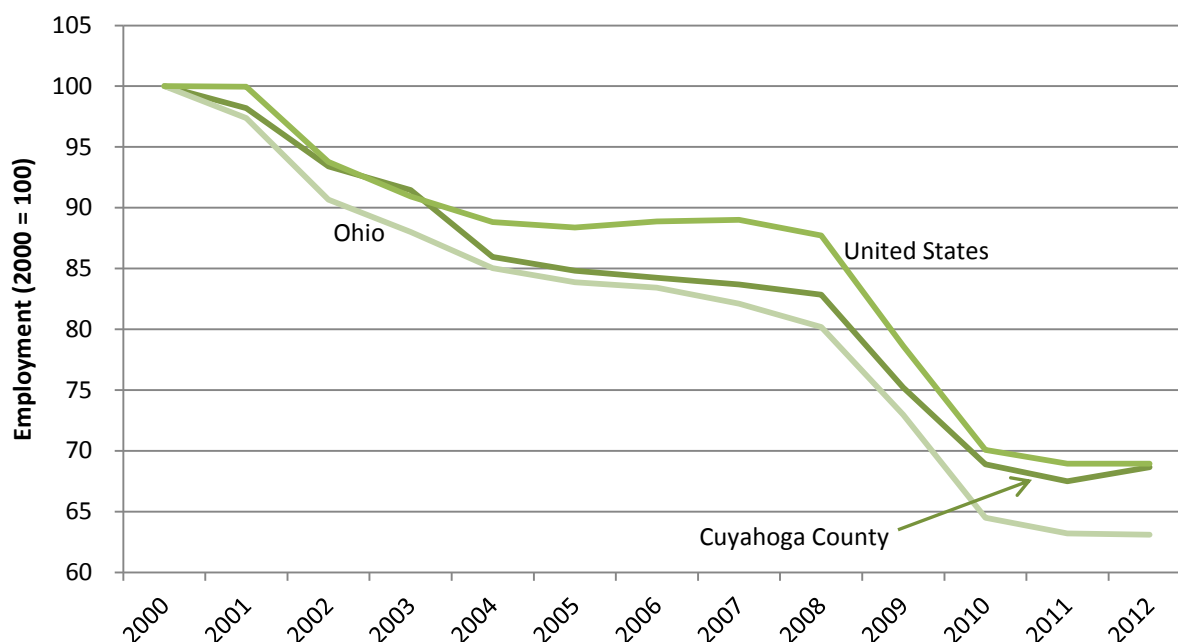
Note: Any omitted data is due to confidentiality restrictions associated with the data source.

All data has been adjusted to 2012 dollars using CPI for the Cleveland MSA.

Although employment decreased during this study (2000 to 2012), the art sector employment trend is not uncharacteristic of the trends for the United States and Ohio (Figure 2). All three geographic regions follow very similar patterns throughout the study period. As seen in Appendix Table A.7, most of the subsectors' employment numbers steadily drop over the thirteen years, with some slight variation. *Textiles* are an exception, which saw an employment increase from 240 to 466 from 2002 to 2003. The next year, though, employment dropped down to 339 jobs. This instability is a result of a fluctuating retail sector.

¹⁰⁶ The number of employees in certain sectors, specifically artists, is undercounted as the database does not provide information on establishments with only one employee, as is the case with independent artists.

Figure 2: Index of VACD Employment, Cuyahoga County, Ohio & U.S.



Source: Quarterly Census of Employment and Wages (QCEW)

As seen in Table 2, eight out of the ten subsectors experienced a negative employment change from 2000 to 2012. *Artists* and *Education, Health, and Museums* are the only exceptions, with employment numbers increasing 124.2% (from 10 to 23) and 2.0% respectively. *Galleries & Promoters* had the largest decline in jobs, at -70.9% (a loss of 121 jobs). *Printing*, which consistently holds the largest share of employment, lost 3,082 jobs from 2000 to 2012.

Table 2: VACD Subsectors Employment Percent Change, 2000-2012

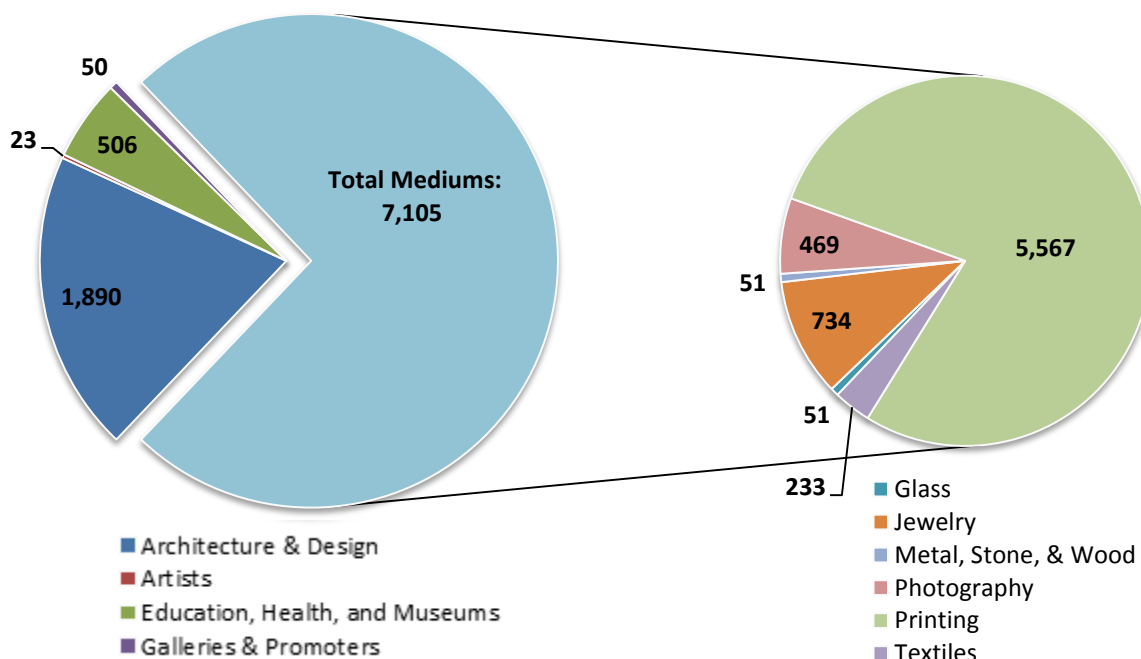
Subsector	Employment Change	% Change
Architecture & Design	-113	-5.7%
Artists	13	124.2%
Education, Health, and Museums	10	2.0%
Galleries & Promoters	-121	-70.9%
Glass	-9	-14.2%
Jewelry	-471	-39.1%
Metal, Stone, & Wood	-54	-51.1%
Photography	-475	-50.3%
Printing	-3,082	-35.6%
Textiles	-71	-23.5%
TOTAL	-4,373	-31.4%

Source: Quarterly Census of Employment and Wages (QCEW)

The 2012 employment numbers are dominated by *Printing*, which holds a 58.1% share of all VACD employment in the Cleveland area at 5,567 jobs (Figure 3). The second highest is *Architecture & Design*, although at 1,890 jobs and 19.7% share, it is just under one-third the size of *Printing*. *Artists* have the

lowest levels of employment, at 23, in the establishments with over one employee. Other subsectors with employment numbers under 100 are *Glass*, *Galleries & Promoters* and *Metal, Stone, & Wood*.

Figure 3: 2012 Employment by Subsector in Cuyahoga County



Source: Quarterly Census of Employment and Wages (QCEW)

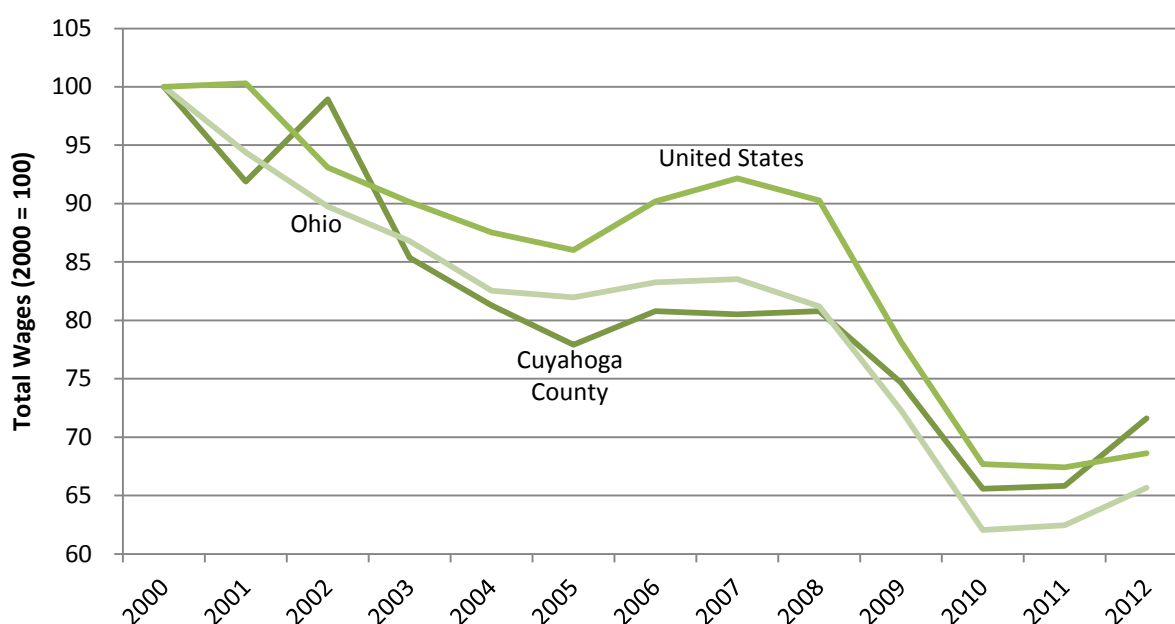
Payroll

Payroll also fluctuated greatly throughout the study's thirteen-year duration (Figure 4). In Cuyahoga County, the VACD sector saw a spike in 2002, the result of a large boost in the *Printing* subsector. This subsector quickly dropped back to U.S. and state trends, decreasing steadily until 2005. All sectors saw a bump from 2006 through 2008, but the Great Recession caused a rapid drop from 2008 to 2010. On a positive note, the Cleveland area is recovering the quickest from the recession in this subsector, having the largest percent increase from 2011 to 2012.

Between 2011 and 2012, the greatest increase in payroll rates occurred in the *Metal, Stone, & Wood* subsector from \$1.6 million to \$3.0 million, or an 84.8% increase. *Artists*, on the other hand, saw the largest decrease in payroll, dropping -15.8%.¹⁰⁷

¹⁰⁷ For more details on the VACD payroll by subsector, please see Appendix A.8.

Figure 4: VACD Total Payroll Indexed, Cuyahoga County, Ohio, & US



Source: Quarterly Census of Employment and Wages (QCEW)

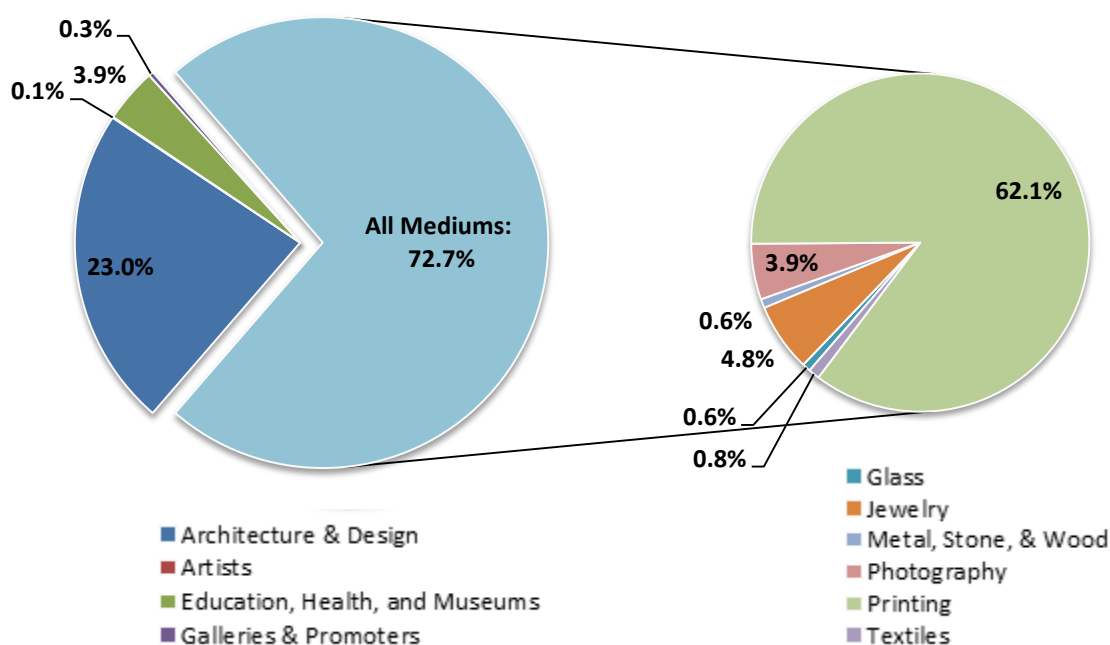
Note: All data has been adjusted to 2012 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data

Similar to employment, total payroll in the *Printing* subsector is strong in Cuyahoga County, holding a 62.1% share of VACD payroll for 2012 at over \$297 million (Figure 5).¹⁰⁸ *Architecture & Design* follows with 23% share and over \$110 million in payroll. All other subsectors are below \$25 million in payroll, with *Artists* having the lowest payroll at just over \$292,000. This is not surprising, considering *Artists* also have the lowest levels of employment as well and are the least represented by the data.¹⁰⁹

¹⁰⁸ Total payroll approximates the overall size of the economy in a corresponding sector.

¹⁰⁹ For more details on the VACD statistics by subsector, please see Appendix A.7-A.10.

Figure 5: VACD Total Payroll in Cuyahoga County, 2012



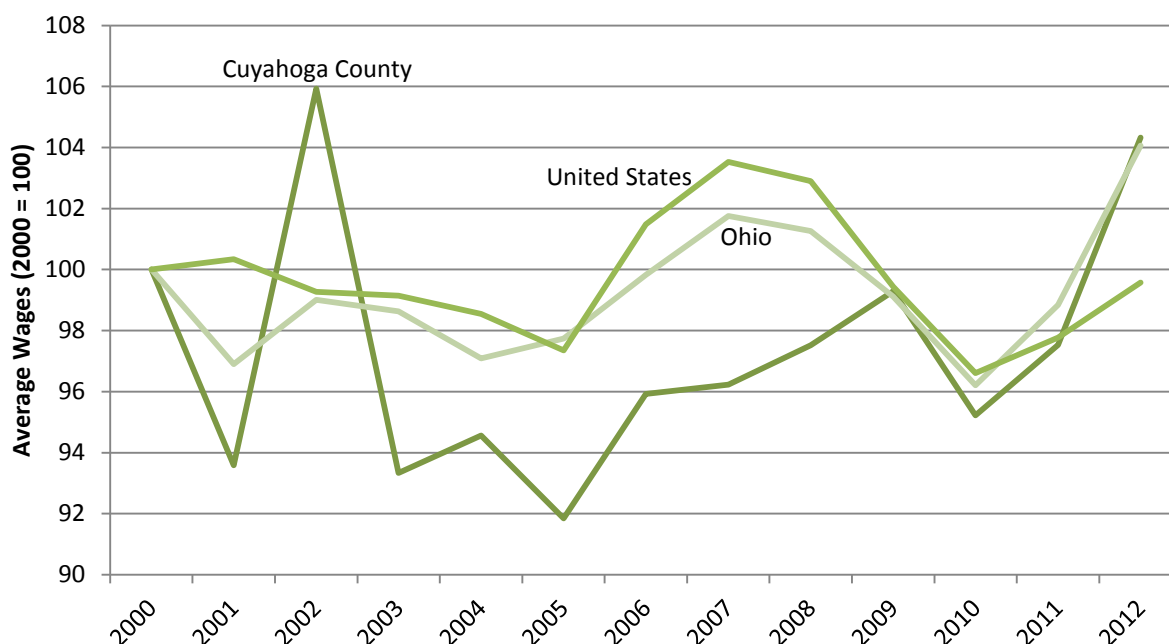
Source: Quarterly Census of Employment and Wages (QCEW)

Average Wages

The average wages in Cuyahoga County were more erratic over time than state or country wages (Figure 6). The major spike in 2002 occurred as a direct result of the boost in total payroll and decrease in employment in the *Printing* subsector, which could be linked to an increase in productivity by higher paid employees.¹¹⁰ The average wage for *Printing* in 2002 was around \$57,000, while in both 2001 and 2003, *Printing's* average wage was about \$47,000. After some fluctuation from 2005 to 2009, the VACD sector increased steadily. As expected, the Great Recession caused a dip in all regions analyzed. From 2010 to 2012, however, all regions increased in average wages, with both Cuyahoga County and the State of Ohio rising quicker than the country.

¹¹⁰ The average wages, i.e. annual salaries, are calculated as a product of the total payroll divided over the total employment.

Figure 6: Index of VACD Average Wages, Cuyahoga County, Ohio, & U.S.



Source: Quarterly Census of Employment and Wages (QCEW)

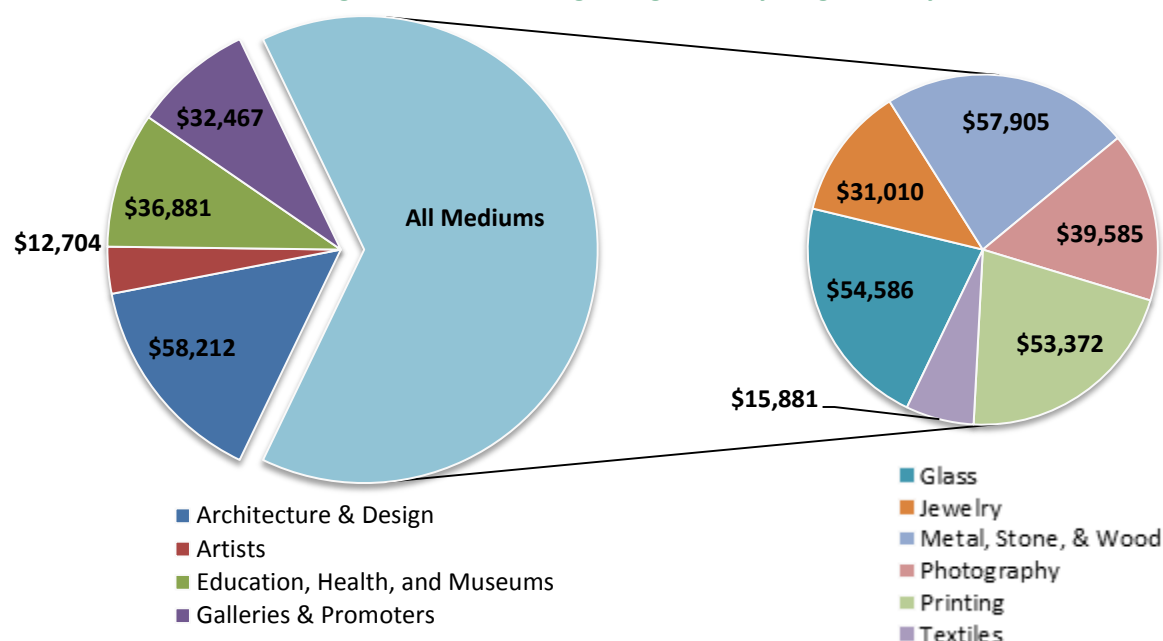
Note: All data has been adjusted to 2012 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data

Metal, Stone, & Wood, similarly to payroll, have the highest percent increase from 2011 to 2012 at 23.1% (\$57,905 in 2012). *Artists'* average wages also possess the same ranking as payroll, with the largest percent decrease (-67.9%) from 2011 to 2012 (-\$12,704 in 2012). The low average wage for *Artists* is likely due to the piecemeal nature of their employment. Artists tend to have multiple jobs; for example, an artist may also teach art classes or work in an altogether different industry for his/her second job.

The subsector with the largest average wage for 2012 is *Architecture & Design* at \$58,212 (Figure 7). *Metal, Stone, and Wood* follow closely behind at \$57,905. Both *Printing* and *Glass* earn an average wage of over \$50,000, while *Artists* and *Textiles* make the lowest average wage at \$12,704 and \$15,881, respectively.¹¹¹

¹¹¹ For more details on the VACD average wages by subsector, please see Appendix A.9.

Figure 7: 2012 Average Wages in Cuyahoga County



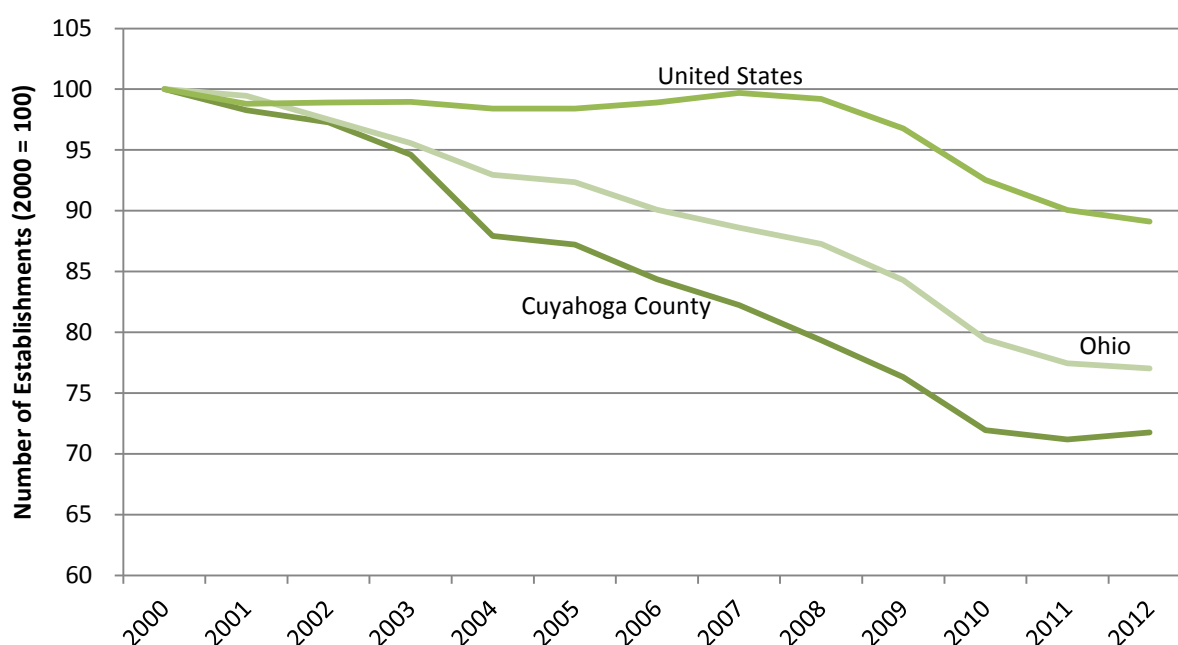
Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2012 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data

Number of Establishments

The number of establishments counts businesses by location; each branch of a business therefore represents its own establishment. Establishment numbers in the VACD sector have decreased not only in Cuyahoga County, but also across the entire state of Ohio and United States (Figure 8). Nonetheless, while the number of establishments for Cuyahoga County decreased steadily from 2000 through 2011, 2011 through 2012 experienced a slight increase. This increase occurred only for the county, while the U.S. and Ohio VACD sector continued to decrease.

Figure 8: VACD Number of Establishments Indexed, Cuyahoga County & U.S.



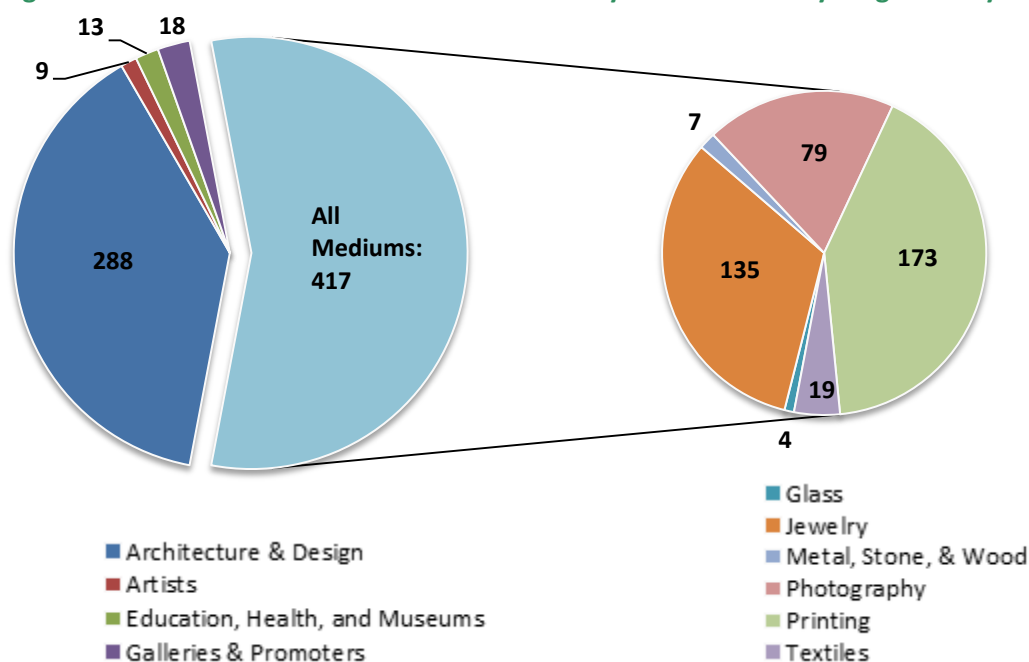
Source: Quarterly Census of Employment and Wages (QCEW)

Upon further analysis, the cause is an influx in establishments between 2011 and 2012. In this time period, seven of the ten subsectors saw an increase in establishments, with *Artists* reaching the largest percent increase of 32.5% (2 establishments). The Cleveland VACD overall saw an increase of 0.8%, a net total 6 establishments gained. *Textiles*, on the other hand, saw the largest percent decrease, at -17.4% (4 establishments from 23 establishments to 19).

Architecture & Design for the year 2012 had the largest share of total VACD establishments at 288 and 38.7% (Figure 9). *Printing* and *Jewelry* follow at 173 establishments and 135 establishments, respectively. All other subsectors contain fewer than 100 jobs each and have a combined 20.0% share of jobs.¹¹²

¹¹² For more details on the number of VACD establishments by subsector, see Appendix A.11.

Figure 9: 2012 Number of VACD Establishments by Subsector in Cuyahoga County

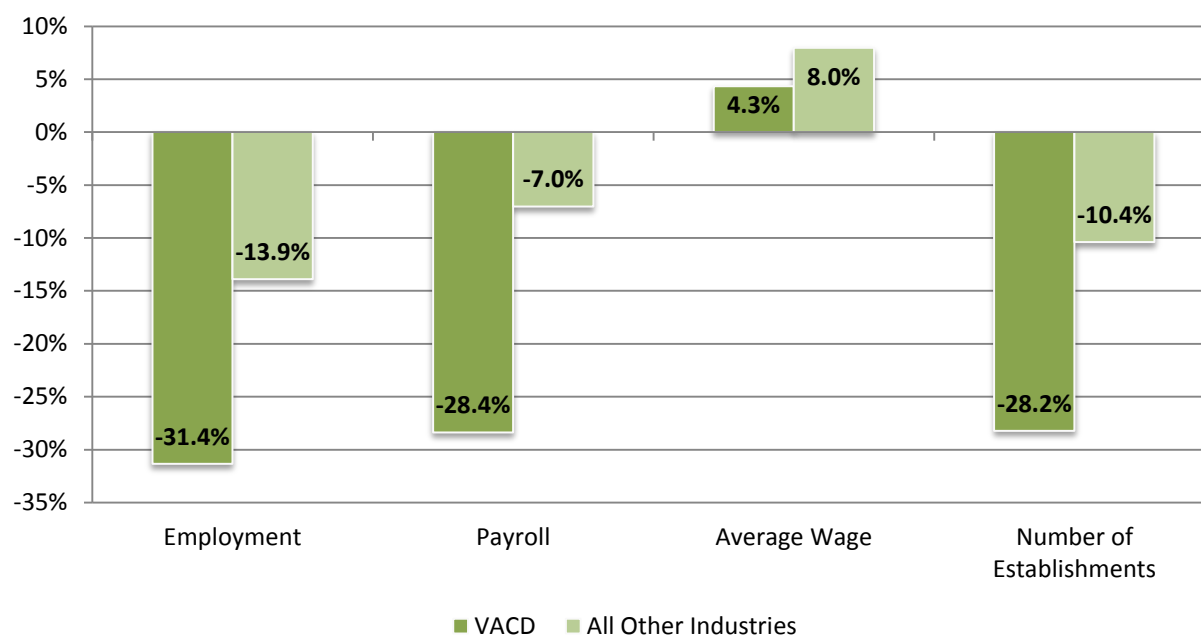


Source: Quarterly Census of Employment and Wages (QCEW)

THE CLEVELAND VACD SECTOR AND CUYAHOGA COUNTY COMPARABLES

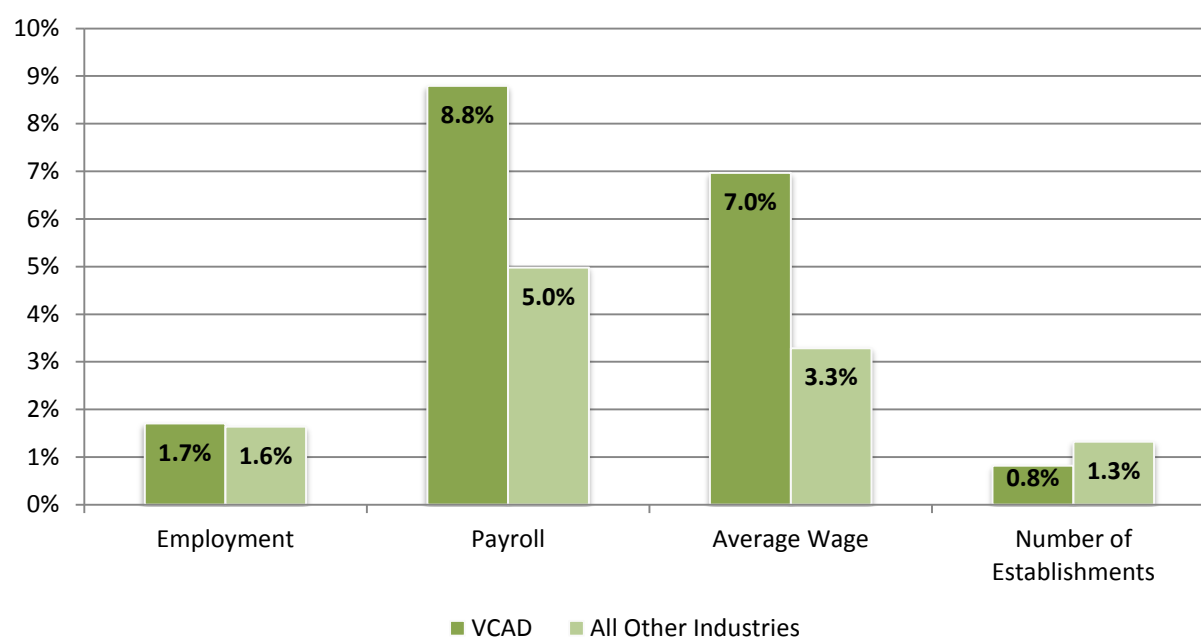
The long term trends from 2000 through 2012 illustrate downward movement in all measures except average wages (Figure 10); three of four indicators have a declining percent change. When looking at all other industries in the same region, the same three indicators (employment, payroll, and number of establishments) dropped as well, though not as drastically as the VACD sector. What should be noted, though, is what is seen across all of the economic measures from 2011 to 2012: all indicators for Cuyahoga County increased. The same cannot be said for Ohio and the United States, since employment and establishment numbers decreased from 2011 to 2012. Thus, this increase in the VACD sector could be correlated to the overall economic growth in Cuyahoga County that has exceeded the state and national growth in the last year.

Figure 10: Cuyahoga County VACD & All Other Industries Percentage Change, 2000-2012



Source: Quarterly Census of Employment and Wages (QCEW)

As Figure 11 shows, when comparing the VACD with all Cleveland industries, the percentage change from 2011 to 2012 demonstrates a much more optimistic outlook. Not only did all of the indicators experience an increase, but all measures—except number of establishments—grew at a faster rate in the VACD than all other industries combined. Total payroll, wages and employment follow signs of overall economic improvements, while new establishments are formed as a result of longer term prosperity as when entrepreneurs gain greater confidence for survival. All indicators seemed to level out in 2010 and, excepting number of establishments once again, began to slowly rise. VACD payroll increased the most from 2011 to 2012 at 8.8%, while all other industries experienced only a 5.0% growth. Average Wages had the second-highest percent upsurge for the VACD at 7.0%. This is 3.7% higher than the percent increase for all industries, which was 3.3%.

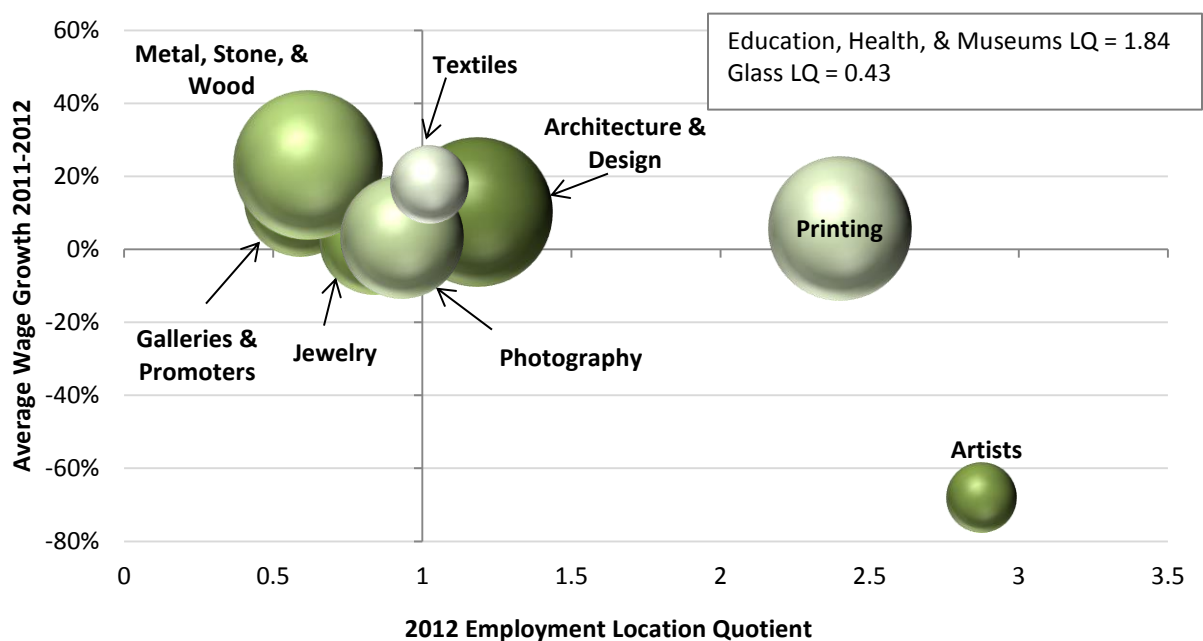
Figure 11: Cuyahoga County VACD & All Other Industries Percent Change, 2011-2012

Source: Quarterly Census of Employment and Wages (QCEW)

Figure 12 details the growth rate in average wages of each subsector from 2011 through 2012.¹¹³ All subsectors except *Artists* had a positive growth rate, with *Metal, Stone, & Wood* ranked the highest with 23.1% growth. Also, more average wage information can be gathered by considering the bubble size: the larger the bubble, the higher the average wage. With an average wage of \$58,212 in 2012, *Architecture & Design* has the largest bubble, while *Artists* have the smallest bubble with an average wage of \$12,704 in 2012.

Figure 12 also features the Location Quotient (LQ), which assesses the region's subsectors when compared to U.S. subsectors in terms of 2012 employment. Where LQ is greater than 1, the region has a higher proportion of employment than the entire country, which indicates potential regional specializations. While *Artists* was the only subsector without positive growth in terms of average wage, it shone in its Location Quotient with a value of 2.87. This figure indicates that Cleveland has a strong artist presence based on the available data. Other subsectors with an LQ above 1 include *Printing*; *Architecture & Design*; *Education, Health, & Museums*; and *Textiles*. The subsector with the lowest LQ is *Glass* at 0.43.

¹¹³ Only eight of ten subsectors can be analyzed in terms of average wage growth due to confidentiality issues with the ES202 data; Education, Health, & Museums and Glass are omitted from the bubble graph, however their LQ numbers are provided for reference.

Figure 12: Employment Location Quotient and Average Wage Growth of the Cleveland VACD

Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2012 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data

CONCLUSION

While the trends between 2000 and 2012 showed a downward trend in employment, payroll, and the number of establishments, this mirrors the activity in all industries in the region. This sector has declined in employment by 31.4% since the year of 2000; however, between 2011 and 2012 the VACD sector grew 1.7% in Cuyahoga County, while it declined in Ohio (-0.1%) and remained stagnant in the U.S. All indicators for Cuyahoga County increased between 2011 and 2012 and could be correlated to the overall economic growth in the county that has exceeded the state and national growth in the last year.

CHAPTER 2

OCCUPATIONAL ANALYSIS OF THE CLEVELAND VACD SECTOR

METHODOLOGY

Examining the industrial components of the Cleveland Visual Arts, Craft and Design (VACD) sector is one way to capture the typology of the companies within this sector, but it may leave out information about individuals in occupations not traditionally considered “art” industries. For example, if a graphic designer is employed by a law firm to design promotional materials for the firm he/she would not be captured by the industry data. That is why occupational and industry analyses are complementary. This analysis is based on the Standard Occupational Classification (SOC) system’s data. The SOC system is used by federal statistical agencies to classify workers into occupational categories for the purpose of collecting, calculating, and/or disseminating data. All workers are classified into one of 840 detailed occupations according to their occupational definition.¹¹⁴ The Bureau of Labor Statistics (BLS) develops estimates of occupational employment and wages for both wage and salaried workers in nonfarm establishments through its Occupational Employment Statistics (OES) Survey. This survey collects information from business establishments sampled by industry and geographic area. For OES survey respondents to report on an occupation, the duties or work performed in the occupation must be uniquely defined. An occupation is a category made up of jobs that share similarities in terms of work performed and skills possessed by the incumbents.

This analysis of the VACD sector is based on the data obtained from VACD-related occupations. To create the VACD-related occupation database, the research team gathered keywords that reflect VACD occupations and conducted a review of other studies analyzing VACD occupations.^{115,116} The research team determined 27 VACD occupations should be included in this analysis.¹¹⁷

As a next step, data was collected from the U.S. Bureau of Labor Statistics Occupational Employment Statistics (OES). At times, OES employment data was suppressed due to confidentiality or margin of error limitations. In these instances, the missing data was estimated based on the national matrix of occupational statistics and the Quarterly Census of Employment and Wage micro-data (QCEW), which is housed at the Center for Economic Development at Cleveland State University. The research team applied national shares of occupations to the industry employment data from QCEW.

¹¹⁴ Standard Occupational Classification, The Bureau of Labor Statistics, U.S. Department of Labor, <http://www.bls.gov/soc/home.htm>

¹¹⁵ Alliance for Creative Advantage (2008, December) The State of Colorado’s Creative Economy. http://www.coloradocreativeindustries.org/sites/default/files/media/media/the_state_of_colorados_creative_economy_-_full_study.pdf

¹¹⁶ Markusen, A., & Gadwa, A. (2010). Creative Placemaking. Washington, D.C.: National Endowment for the Arts <http://www.nea.gov/pub/CreativePlacemaking-Paper.pdf>

¹¹⁷ For more information about the SOC included see Appendix Table A.11.

This occupational analysis examines VACD-related occupations in the Cleveland-Elyria-Mentor Metropolitan Statistical Area (MSA)¹¹⁸ no matter where individuals are employed.¹¹⁹ OES defines occupational employment as all part- and full-time workers who are paid a wage or salary.¹²⁰ OES wage data were inflated to 2012 dollars using the Cleveland-Akron MSA Consumer Price Index (CPI).

In order to benchmark the Cleveland-Elyria-Mentor MSA, four comparable MSAs were selected: Pittsburgh, PA; Columbus, OH; Cincinnati-Middletown, OH-KY-IN; and Indianapolis-Carmel, IN.¹²¹ For the benchmarked MSAs, only OES data was collected. The data for the comparison groups were inflated using the United States Consumer Price Index. For comparable MSAs with missing values, the research team based missing value imputation to the prior or subsequent year actual value.

OCCUPATIONAL ANALYSIS

Employment

About 7,000 individuals identified themselves as having skills in one of the VACD occupations in the Cleveland MSA. Table 3 displays total employment for all VACD occupations, total employment for all occupations in the Cleveland MSA, and the VACD share of total employment for each year from 2006 to 2012.¹²² Overall, VACD occupational employment represents a small portion of overall employment, capturing less than 1% of all workers.

Table 3: VACD and Total Occupational Employment in the Cleveland MSA, 2006-2012

	2006	2007	2008	2009	2010	2011	2012
VACD Employment	7,585	7,812	7,577	7,581	7,468	7,302	6,884
Total Employment	1,063,460	1,059,760	1,051,540	1,003,270	968,160	978,400	994,380
VACD Share of Total Employment	0.71%	0.74%	0.72%	0.76%	0.77%	0.75%	0.69%

Source: Bureau of Labor Statistics, Occupational Employment Statistics
Occupational data from Quarterly Census of Employment and Wages

Figure 13 is a graphical representation of Table 3. The peak employment of VACD occupations was reached in 2007 with 7,812 jobs, or 0.74% of all jobs. Although the peak year for VACD occupational employment was in 2007, it was not the peak year for the VACD share of total employment, which occurred in 2010. These numbers indicate that although the share of VACD employment remained relatively stable, total employment decreased in the MSA and VACD occupational employment over the last four years (2009 to 2012) saw a 10% decline.

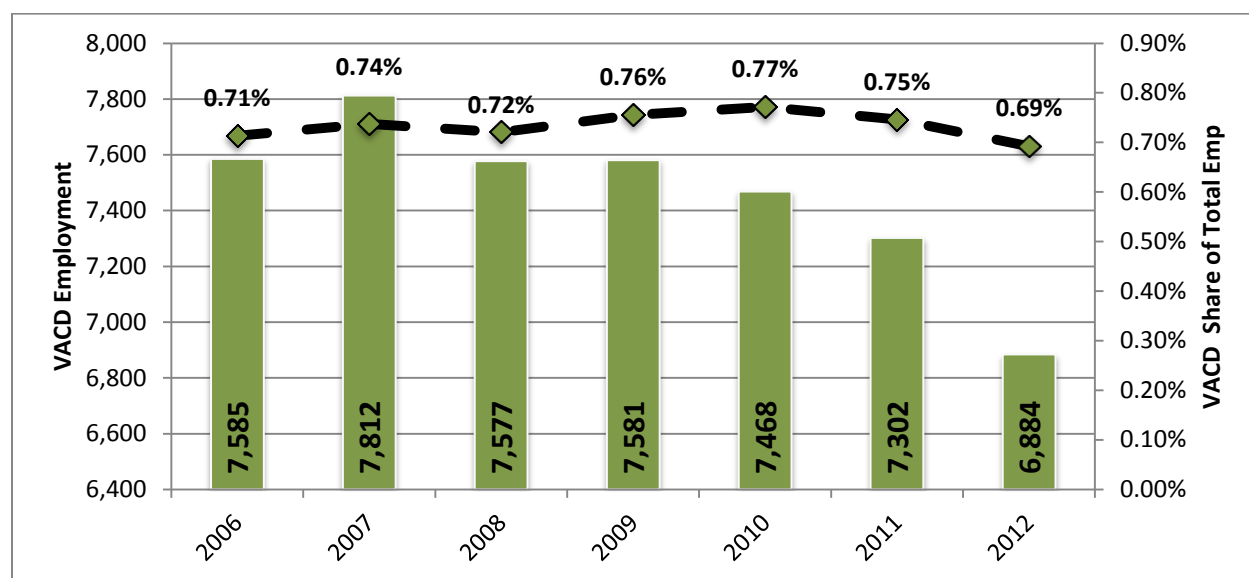
¹¹⁸ The Cleveland-Elyria, OH MSA includes Cuyahoga, Geauga, Lake, Lorain, and Medina Counties. The MSA level of analysis is used for this analysis because it is the smallest geography for which data is available.

¹¹⁹ Occupational data from the Bureau of Labor Statistics does not include self-employed.

¹²⁰ U.S. Bureau of Labor Statistics Occupational Statistics http://www.bls.gov/oes/oes_ques.htm#def

¹²¹ In following text we used only the central city name to identify corresponding MSA.

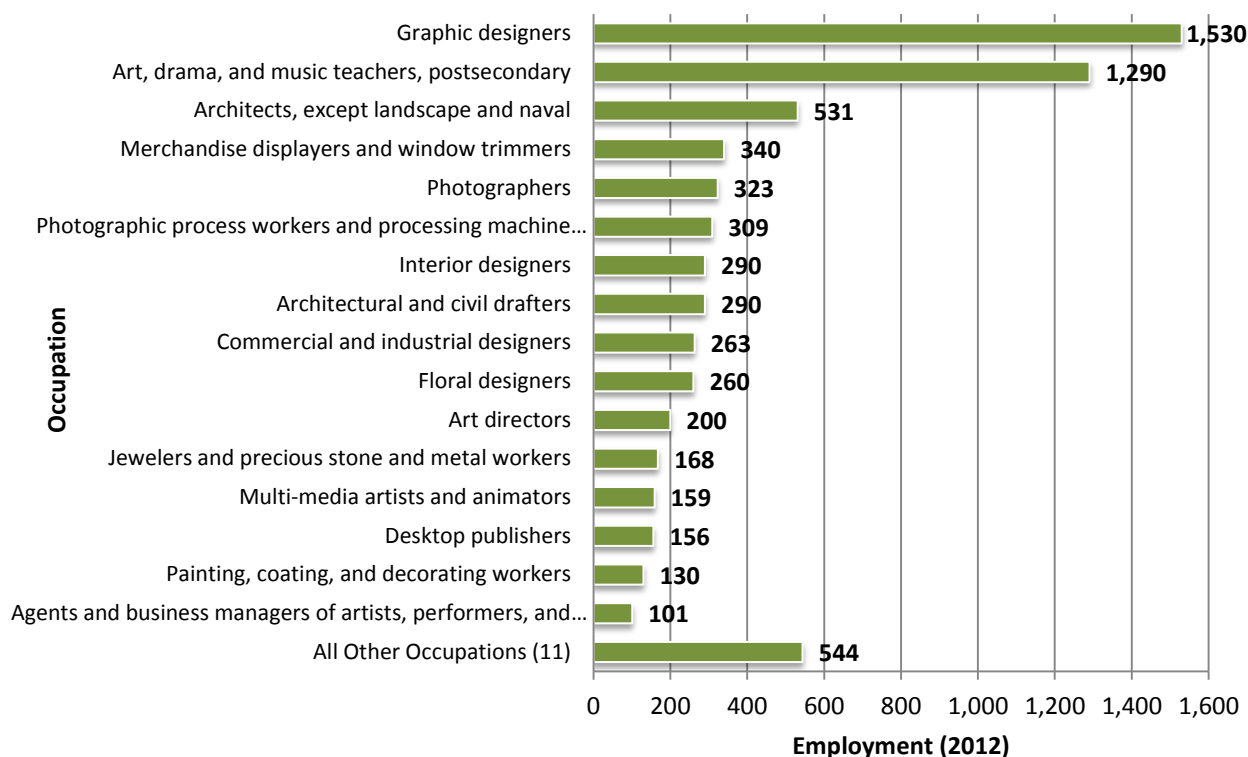
¹²² The data was analyzed for the years 2006 to 2012 due to changes in the Standard Occupational Code definitions.

Figure 13: VACD Employment and VACD Share of Total Employment in the Cleveland MSA, 2006-2012

Source: Bureau of Labor Statistics, Occupational Employment Statistics
Occupational data from Quarterly Census of Employment and Wages

Figure 14 breaks out overall VACD occupational employment in 2012, revealing that, at 1,530 jobs, *Graphic Designers* have the largest employment level of all occupations in the Cleveland MSA. This occupation is closely followed by *Art, Drama, and Music teachers, postsecondary*, with 1,290 individuals.¹²³ Additionally, *Architects, except Landscape and Naval* are above 500 jobs. Ultimately, the top three occupations out of 27 hold a 48.7% share of all occupations. For a complete listing of VACD employment by occupation by year for the Cleveland MSA see Appendix Table A.12.

¹²³ The data within this occupation include not only VACD-related teachers, but also music and drama teachers. OES statistics prohibit obtaining data specifically on VACD-related teachers within this category.

Figure 14: VACD Occupational Employment in the Cleveland MSA, 2012

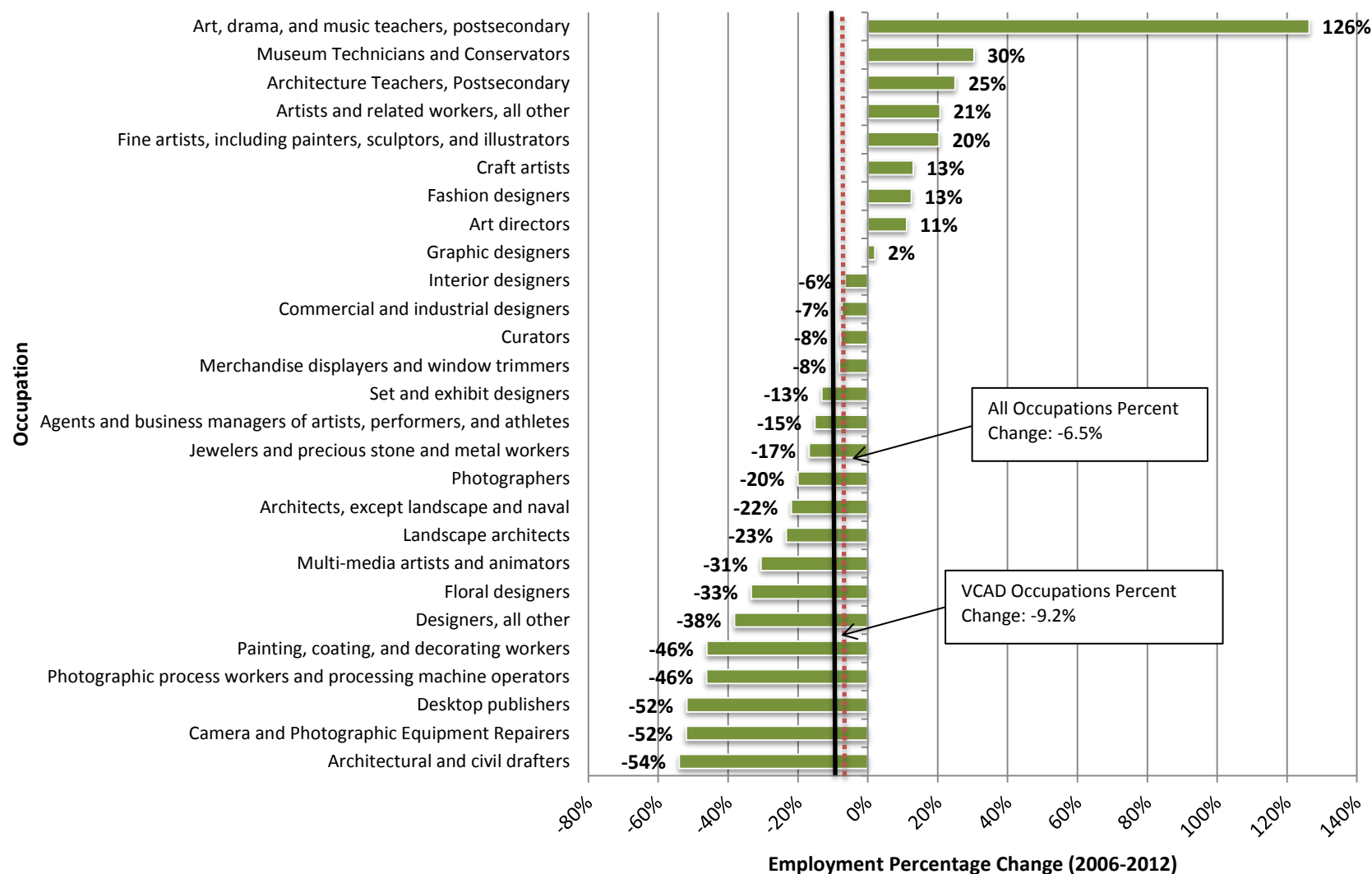
Note: Due to OES restrictions, we cannot differentiate art teachers from *Art, drama, and music teachers, postsecondary*

Source: Bureau of Labor Statistics, Occupational Employment Statistics

Occupational data from Quarterly Census of Employment and Wages

During this timeframe, only nine VACD occupations experienced employment growth (*Art, Drama, and Music Teachers, postsecondary; Museum Technicians and Conservators; Architecture Teachers, postsecondary; Artists and Related Workers, all other; Fine Artists, including Painters, Sculptors and Illustrators; Craft Artists; Fashion Designers; Art Directors; and Graphic Designers*). Along with having the second-highest overall 2012 VACD employment, the category *Art, Drama, and Music Teachers, postsecondary* had the highest percent employment increase from 2006 through 2012 (126%) (Figure 15). Notably, this increase is not characteristic of all Cleveland MSA occupations, which experienced a - change.

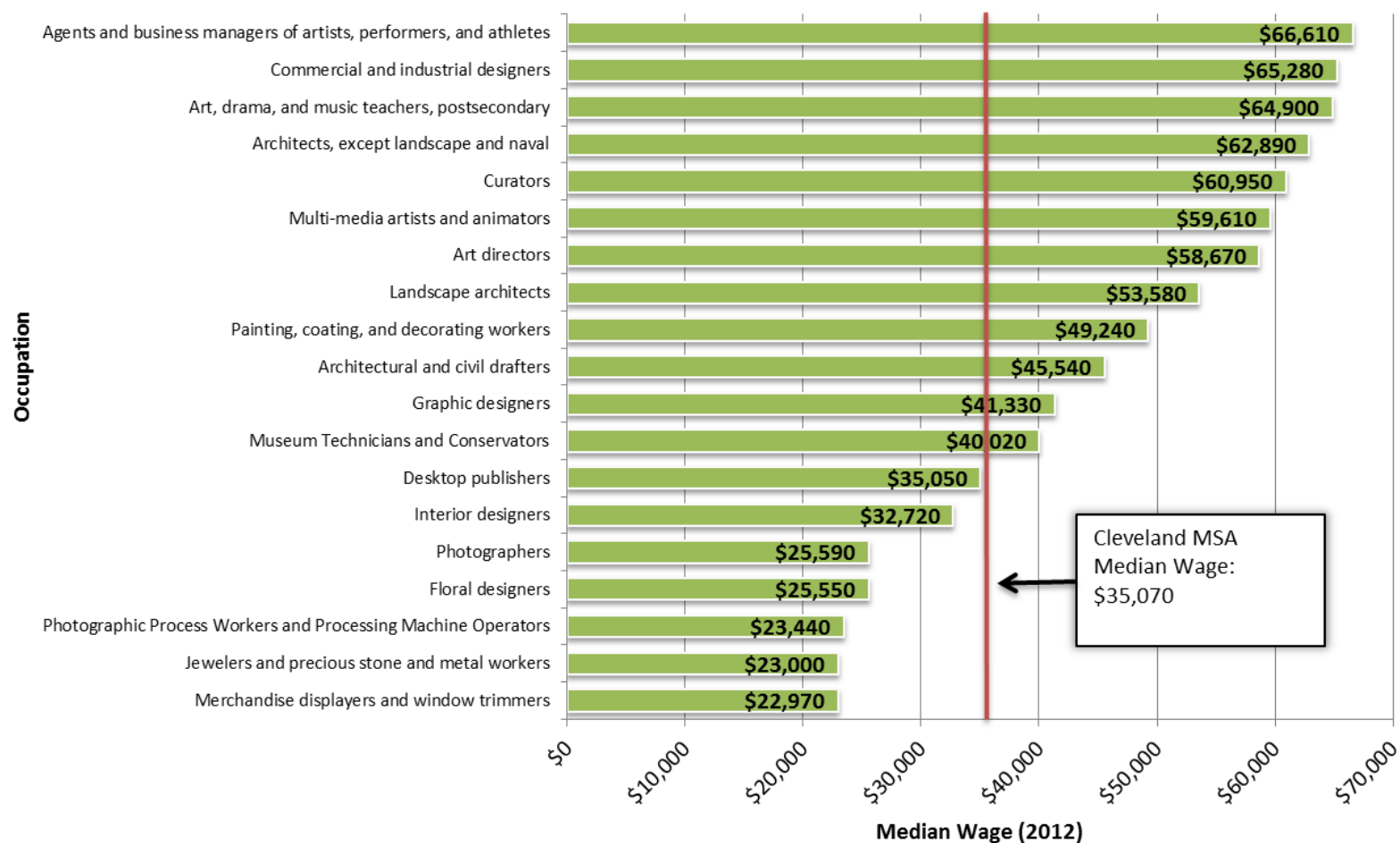
Figure 15. VACD Occupational Employment Change, Cleveland MSA, 2006-2012



Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

Wages

Figure 16: VACD Median Wage, Cleveland MSA, 2012



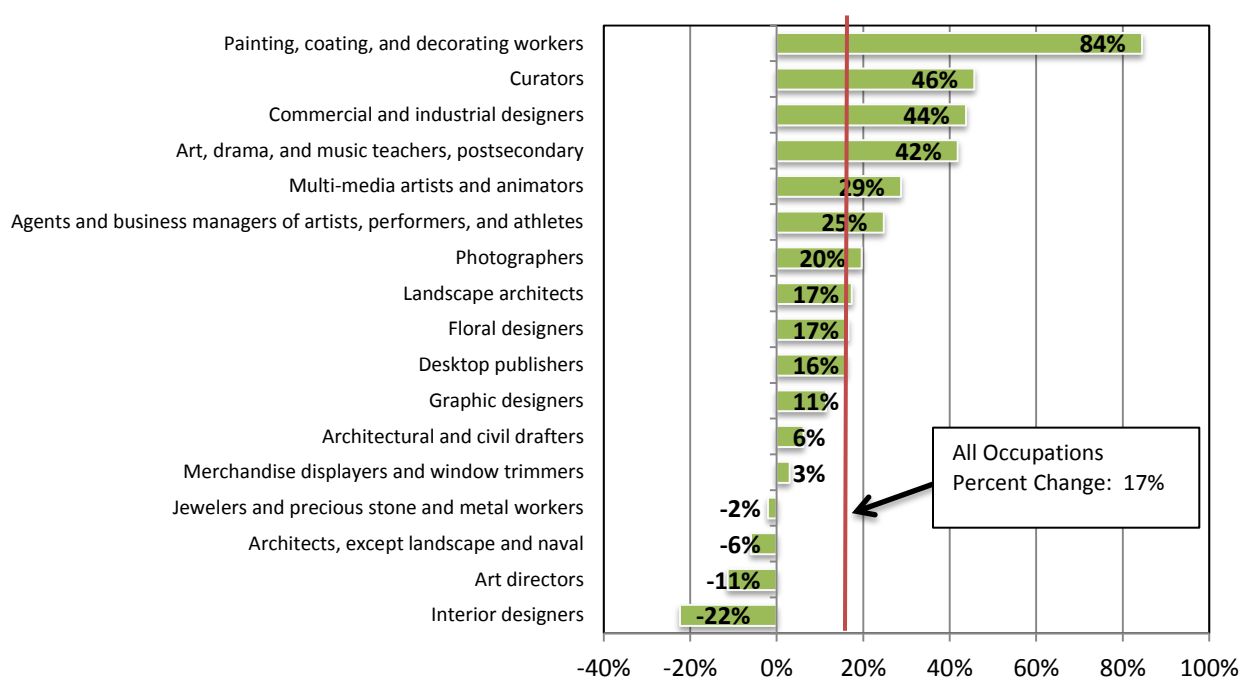
Note: Wages in 2012 dollars.

Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

Figure 16 displays the median wage for VACD occupations, along with the median wage for all occupations in the Cleveland MSA. *Agents and business managers of artists, performers, and athletes* had the highest median wage in 2012 (\$66,610), followed by *Commercial and industrial designers* (\$65,280) and *Art, drama, and music teachers, postsecondary* (\$64,900). Some occupational categories did not have median wages calculated due to disclosure limitations for either 2006 or 2012 and were therefore excluded from the analysis. This is why the overall number of occupational categories varies in some portions of this analysis. Only seven of the nineteen occupations are lower than the Cleveland MSA median wage, indicating VACD jobs provide a comparable standard of living for individuals employed within this sector. Again, wages do not distinguish between full- and part-time employees so these figures may undercount the actual hourly wage of some artists.¹²⁴

Most VACD occupations saw an increase in median wage from 2006 to 2012 (Figure 17). Only five of the seventeen occupational categories had a negative percent change over this seven-year timeframe. Of these five, only two had a median wage lower than the 2012 Cleveland MSA median wage (\$35,070) (See Figure 4).

Figure 17: Visual Arts and Crafts Median Wage Percent Change, Cleveland MSA, 2006-2012



Note: Wages in 2012 dollars

Source: Bureau of Labor Statistics, Occupational Employment Statistics;
Occupational data from Quarterly Census of Employment and Wages

¹²⁴ For more information see the Bureau of Labor Statistics, Occupational Employment Statistics
http://www.bls.gov/oes/oes_ques.htm

CLEVELAND MSA VS. COMPARABLE MSAs

Examining the percentage of VACD occupational employment as a share of total employment enables an analysis of this sector across comparable metropolitan regions. Table 4 reveals this share of the Cleveland MSA in comparison to four other comparable MSAs. The Cleveland region remained on the lower end during the study's first years, but by 2011 and 2012, it was ranked in the middle range of comparable MSAs. Over the six-year period, VACD share in Cleveland declined only -0.02%, the lowest of all comparable MSAs, while Columbus was experiencing the largest decline of their comparable VACD share at -0.15%. The decline of the VACD share is the product of two factors, declining employment of VACD occupations and growing total employment of all occupations in the region.

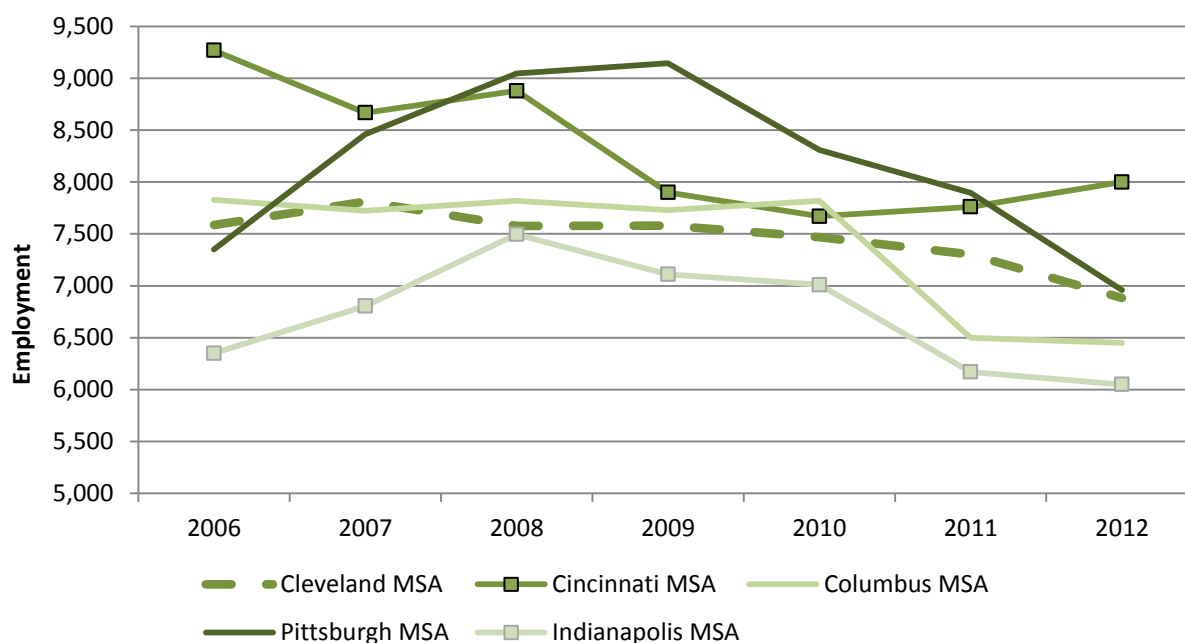
Table 4: Cleveland VACD and Comparable MSAs Share of Total Employment, 2006-2012

MSA	2006	2007	2008	2009	2010	2011	2012	Pct. Change 2006- 2012
Cleveland MSA	0.71%	0.74%	0.72%	0.76%	0.77%	0.75%	0.69%	-0.02%
Cincinnati MSA	0.91%	0.84%	0.86%	0.79%	0.80%	0.80%	0.82%	-0.09%
Columbus MSA	0.86%	0.84%	0.84%	0.85%	0.88%	0.73%	0.71%	-0.15%
Pittsburgh MSA	0.66%	0.75%	0.80%	0.82%	0.76%	0.71%	0.62%	-0.04%
Indianapolis MSA	0.72%	0.76%	0.83%	0.82%	0.82%	0.71%	0.68%	-0.04%

Source: Bureau of Labor Statistics, Occupational Employment Statistics;
Occupational data from Quarterly Census of Employment and Wages

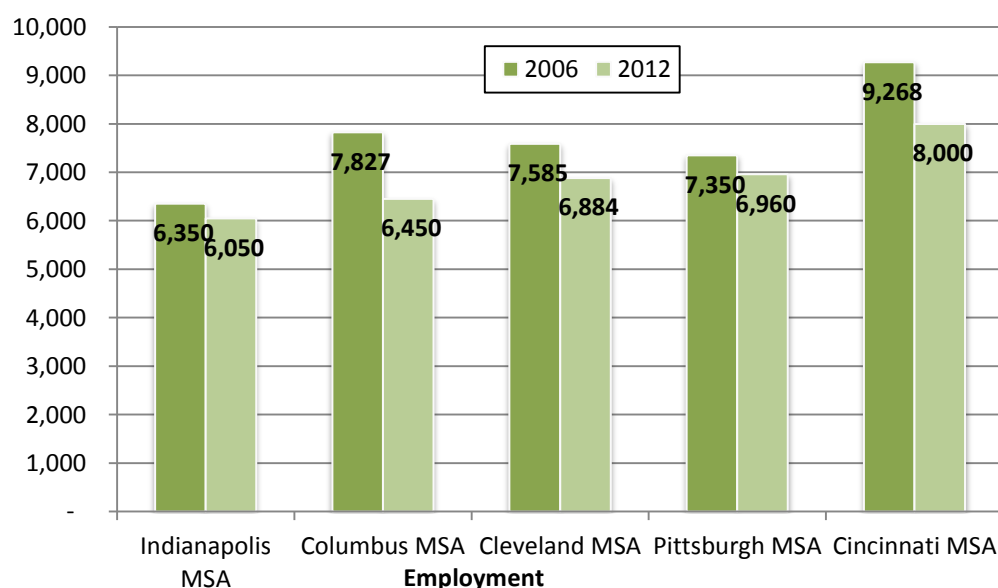
Studying each comparable MSA reveals that the top occupations for each MSA were similar in nature. As seen in Figure 14, 2012's top occupations in the Cleveland MSA according to employment numbers were: *Graphic designers* (1,530); *Art, drama, and music teachers, postsecondary* (1,290); and *Architectural and civil drafters* (531). Similar to the Cleveland MSA, the Cincinnati MSA's top occupations for 2012 were: *Graphic designers* (1,570); *Art, drama, and music teachers, postsecondary* (1,100); and *Architectural and civil drafters* (930). Likewise in the Columbus MSA, the top occupations in 2012 were: *Graphic designers* (1,700); *Architects, except landscape and naval* (640); and *Architectural and civil drafters* (610). As with the other two MSAs, Pittsburgh has a similar top occupation structure for 2012: *Graphic designers* (1,360); *Architectural and civil drafters* (1,150); and *Art, drama, and music teachers, postsecondary* (560). On the other hand, the Indianapolis MSA's top three occupational employment categories for 2012 were: *Graphic designers* (1,250); *Architects, except landscape and naval* (510); and, tied for third, *Merchandise displayers and window trimmers* (470) and *Architects, except landscape and naval* (470).

All comparable MSAs had lower occupational employment in 2012 than in 2006, the starting year (Figure 18). Most MSAs experienced a peak in VACD occupational employment in either 2008 or 2009 and a trough of occupational employment in 2012, mimicking the decline in consumer expenditures from recessionary trends. Now that the national economy seems to be recovering, it will be interesting to see how these sectors fare in subsequent years.

Figure 18: Cleveland VACD and Comparable MSAs Occupational Employment, 2006-2012

Source: US Bureau of Labor Statistics, Occupational Employment Statistics (OES) Survey; Quarterly Census of Employment and Wages (QCEW)

In 2012, the Cincinnati MSA had the highest levels of VACD occupational employment (8,000), while the Indianapolis MSA had the smallest employment figure (6,050) (Figure 19). Cleveland's VACD jobs held better than this sector in Columbus, Cleveland VACD's employment surpassed it with 6,884 jobs in 2012, while lagging Pittsburgh. Pittsburgh raised its VACD jobs to 9,145 in 2009, but lost significant numbers by 2012, ending the study period with 6,960 employees.

Figure 19: Cleveland VACD and Comparable MSAs Occupational Employment, 2006 and 2012

SOURCE: US BUREAU OF LABOR STATISTICS, OCCUPATIONAL EMPLOYMENT STATISTICS (OES) SURVEY; QUARTERLY CENSUS OF EMPLOYMENT AND WAGES (QCEW)

CONCLUSION

Examining occupational patterns in the VACD sector in the Cleveland MSA reveals interesting information about the sector. Overall, approximately 7,000 individuals identified themselves as having skills in one of the VACD occupations (6,884 in 2012), which accounted for 0.69% of total employment in 2012. The occupation with the largest employment in 2012 in the Cleveland MSA is Graphic Designers (1,530), followed by Art, Drama, and Music teachers, postsecondary, with 1,290; and Architects, except Landscape and Naval (531). In regards to wages, only seven of the nineteen occupations have median wages lower than the median wage in the Cleveland MSA. This indicates that VACD jobs provide good living for individuals employed within this sector.

Studying comparable MSAs (Cincinnati MSA, Columbus MSA, Pittsburgh MSA, and Indianapolis MSA) reveals the top occupations for each MSA were similar in nature. In 2012, the Cincinnati MSA had the highest levels of VACD occupational employment (8,000), while the Indianapolis MSA had the smallest employment figure (6,050). All comparable MSAs had lower occupational employment in 2012 than in 2006, the starting year of this analysis.

CHAPTER 3

ANALYSIS OF THE FOCUS GROUPS

INTRODUCTION AND METHODOLOGY

This chapter seeks to analyze and provide a summary of the 6 focus groups conducted in conjunction with this study. The focus groups studied were broken down into six categories that included geographic location (e.g., east side vs. west side), style of visual art (e.g. studio vs. applied), representatives from local art-based institutions, and young artists. East Side and West Side focus groups invited for the discussion artists and representatives of community organizations located across neighborhood from the East and West sides of Cleveland. Studio and Applied arts focus groups captured opinions of artists involved in studio arts and working at art businesses of architecture, digital design and other more applied types of visual arts. Focus group of local art-based institutions discussed challenges of the local visual arts scene with representatives of museums, nonprofit organizations, and foundations. A young artists' focus group gathered for the discussion students and recent graduates of art institutions and artists that represent the Millennial Generation. Overall, 81 individuals were invited¹²⁵ to participate in one of the focus groups, 41 agreed to participate and 34 participated.

The focus groups accomplished a number of objectives, foremost of which was to provide qualitative information that compliments and expands upon the quantitative analyses presented in other chapters of this report. Each focus group included from 4 to 7 representatives of targeted VACD segments and was given open-ended questions leading to a discussion of the visual art scene in Cleveland and Cuyahoga County. Questions and themes discussed during the focus groups were derived from 13 initial interviews conducted with the VACD's leaders and prominent artists at the beginning of this research project. While each focus group started with a detailed description of a related theme (for example, Cleveland neighborhoods for the West Side and East Side focus groups, opportunities for young artists in the region for the Young Artists focus group), all open-ended questions led participants to address strengths, challenges and opportunities of the Cleveland VACD sector.

The insights provided during the focus groups were also important to derive the main theme of this report, one in which innovation and perhaps more visibly, invention, are key components of the VACD sector. These qualities uniquely position the sector as an economic driver for the region with additional latent potential. To that end, four overarching themes within the focus groups were developed and analyzed further. These include:

- Arts Neighborhoods – where artists are living and working
- City in Transition – Cleveland moving forward
- Creativity and Collaboration – Cleveland is both highly creative and highly collaborative
- Changing Patterns and the Generation Gap – Experiencing art and a new cohort

¹²⁵ See the letter of invitation at Appendix A.13.

DEVELOPING COMMON THEMES

In order to better understand what common themes existed within the focus groups it was important to analyze the discussions of all focus group participants. Using notes and recordings, themes began to emerge that were shared across the groups. These themes were then catalogued based on number of occurrences. The most common of these themes, listed previously, were deemed to play the most important roles in the VACD sector at large, with other ancillary themes being important for more specific sub-groups as represented by the focus groups themselves. Figure 20 shows a word cloud of these themes.

Figure 20: Word Cloud of Major Communalities Commonalities across All Focus Groups



Note that, with some exceptions, themes were broken apart by their component words; the word cloud generator does not recognize phrases. For this reason, the word cloud does not properly show the magnitude of each theme as it was analyzed. For this reason, Table 5 shows the analysis by theme ranked by number of total appearances in the focus group discussions.

Table 5: Frequency of Themes within Focus Groups

Theme	# of Appearances
City in Transition	6
Education/Awareness	6
Proportion/Scale	5
Age Gap	5
Collaboration	5
Consumer/Audience	5
Creativity/Innovation	5
Media Gap	5
Institutions	5
Art/Arts Develop. organic	4
Connectivity/Linkages	4
Opportunities for Artists	4
Regional Concerns	4
Affordability	4
Public Art Needs	3
Event Orient./Experiences	3
Guild Mentality	3
Business of art	2
Central Online Portal	2
City Disconnect	2
Conservative	2
Coordination	2
Gallery Model Change	2
Live/work Space	2
Promotion	2
Skilled	2
Uniqueness/Authenticity	2
Down Economy	1
Infrastructure	1
Marketing Failure	1
Technology Gap	1
Unsupportive environment	1
Walkable	1

Individual “occurrences” of a theme may have been discussed more than once within any given focus group, but for the purposes of this analysis if a theme was present at all in a focus group it was counted only once. This may limit the data vis-à-vis measures of the intensity of discussion, i.e. multiple comments or discussions related to a theme within a single focus group. For the purposes of this analysis, however, the researchers were particularly interested in how themes bridged focus groups rather than how intense a theme presented itself within a given focus group. Such intensity is also partially attributable to the individuals taking part in a given focus group. However, this intensity is illustrated to some extent in the full analysis of the focus group results that appears in the subsequent sections of this chapter.

ARTS NEIGHBORHOODS

“Most important thing for an arts neighborhood is that the artists actually live there”

The first theme was there are clear differences in how the VACD sector manifests itself in different neighborhoods. This speaks to an authenticity whereby each neighborhood draws certain types of people and artists to it, based in large part upon the unique place-based amenities and historic appeal of said neighborhood. This rich variety of neighborhoods found in Cleveland is a contributing factor in why focus group participants readily cited that Cleveland has a great “flavor” to it. This neighborhood richness is also a factor in another point that participants noted - that Cleveland has the amenities and high quality arts scene of a large city, but is small enough that it is not overwhelming and congested. Furthermore, participants cited as a positive that the arts-focused neighborhood did not feel contrived or forced, indeed they seemed to have developed organically in their own ways.

“Waterloo is a different kind of neighborhood than Cleveland Heights is... but it won’t stay the way it is and it won’t appeal to everyone when it changes.”

This is not to say there are no challenges for the region. For example, focus groups showed concern that Cleveland has the audience base, and market, of a medium-sized city. This creates a situation where there is compelling, high quality art being produced in the city, but artists often find it necessary to look beyond our region for buyers. Describing how the small consumer base has an impact, members of the Studio focus group said the “Cleveland arts scene is kind of like a dog chasing its tail.” Nonetheless, Cleveland is “still a great place to work. And there’s still a great community here where an artist can be successful by taking advantage of opportunities to sell outside the region.”

“There’s a disconnect between the artists and the clientele”

Another challenge to having a region of artist neighborhoods is a lack of a central district to draw artists and neighborhoods together. In particular, the lack of a central gallery district – one easily recognizable and identifiable to residents and visitors – is a challenge. One component of this challenge mentioned is the lack of a large market in Cleveland that can support galleries over the long term, let alone a district of galleries. A member of the Youth focus group noted they “love the diversity in terms of where you come and go to a gallery or [having an] art theme venue all over, but I think in a lot of ways that that kind of hurts the scene as a whole because it’s so spread out and so sporadic.” However, not all were in favor of the concept of a central gallery district, with a Studio focus group member saying that it would “suck the life out of the other arts districts.”

“It’s very hard to maintain an established gallery in Cleveland.”

One big loss of not having a central district is a visitor from outside of the greater Cleveland area may not know where to go, or may fail to have time to explore all of the arts districts Cleveland has to offer. Some may end up leaving without even knowing what they had missed. A member of the Youth focus

group attributed this to a widespread marketing failure of the arts and culture scene - in contrast to how the foodie scene has made itself into a national destination, saying “sometimes I think that Cleveland has so much to offer but they don’t market themselves in the most efficient way.” Part of this may be due to a lack of coordination among neighborhoods for events, or worse, direct competition among the neighborhoods. Luckily, some of this is already being addressed through greater collaboration and improved communication between neighborhood-based community development corporations (CDCs) as well as by the efforts of groups such as the Collective Arts Network through their publication the *CAN Journal*.¹²⁶

“I think it’s just an issue with coming together and getting people, in their minds, to identify Cleveland as being an arts mecca.”

In all, Cleveland has great assets in its neighborhoods and a strong and vibrant, yet dispersed, visual arts scene. The focus groups were somewhat divided on the value of a potential centralized art gallery district but generally positive about the city’s unique artist neighborhoods and their contribution to a vibrant VACD sector.

CITY IN TRANSITION

“Cleveland is really capable of being whatever you want it to be.”

The second theme identified was “City in Transition”, representing how the region, and city of Cleveland in particular, are simultaneously undergoing processes of revitalization and decline. The revitalization can be seen in the commercial areas of Downtown, Ohio City, Detroit Shoreway, and throughout Tremont - as well as in other areas beginning to receive increased attention like St. Clair-Superior, Collinwood, and Larchmere. It is no surprise many of these neighborhoods are commonly referenced when we think of Cleveland’s art scenes.¹²⁷

***“Young artists can ‘hear’ about changes in other cities...
In Cleveland they can ‘experience’ it.”***

The changes happening throughout Cleveland offer opportunities for artists and designers to make a difference, not only in the neighborhoods they choose to live in but for the city and region as a whole. The result, according to focus groups, is artists believe they are uniquely able to experience and take part in the changes, rather than simply hear about them, as is the case in larger cities. The initial draw for artists to Cleveland often comes through a value proposition. Affordable large open spaces in well-located neighborhoods reduce overhead costs enough for young artists to make a go of it. They are able to focus on the production of their art and worry less about money, which fosters an arts scene that puts a high value on quality. Because of these underlying fundamentals it is not surprising an extensive amount of peer support exists as well.

“I’ve always, always had support from fellow artists.”

¹²⁶ See Chapter 8 with a detailed case study discussing an initiative of CAN Journal.

¹²⁷ For more information on the Tremont and St. Clair Superior neighborhoods, please see their respective case studies in Chapter 8 of this report.

The VACD community, according to members of the Youth focus group and neighborhood focus groups, is highly supportive, particularly of younger artists. Some of this has to do with the personality type of the artists themselves, so results may vary, but the message is clear: Put yourself and your art out there and you can expect a warm welcome. Constructive critiques come continuously after an artist leaves his or her professor-led studio classes in college. Uniquely, members of Cleveland's arts scene continuously offer comments, attend fellow artists' exhibits, and provide ongoing tips for improving one's art. This supportive atmosphere within the arts community, when coupled with positive underlying real estate fundamentals and authentic neighborhood assets place Cleveland in a position to spur continued VACD sector growth.

“There are a ton of exhibitions, a ton of galleries, a lot of open calls for submissions.”

“It’s really easy to get your work out.”

Changing perceptions of the city represent both a challenge and an opportunity. Focus groups cited perceptions in the city and region tend to be less positive than those coming from outside. Referencing a *New York Times* article that recognized Cleveland's transformation, a member of the Institutions focus group noted how there was no complimentary story from the *Plain Dealer*. Receiving validation from outlets like the *New York Times* is encouraging to focus group participants, but this lack of perception shift within the region is somewhat troubling. The goal, then, is for Clevelanders to think of the city first and foremost as a “creative, multi-cultural, multi-talented community” rather than thinking solely of the Browns or the Rock and Roll Hall of Fame.

“Some cities embrace their artists, but for others... art is just for community development.”

The focus groups recognized a city in transition, meaning some vestiges of the old ways remain, especially as artists interact with the city's bureaucracy itself. This interaction presents many hurdles, which artists see as the city failing to sufficiently value the arts as a serious asset. This can be seen in the modest number of live-work districts enacted (a zoning designation), the multiple bureaucratic hurdles for artists trying to undertake projects, and the city's lack of knowledge about innovative community projects already taking place.

“They don’t even get why we’re here.”

***“It’s almost like when you hear art,
[the City] has to say no to you for some reason”***

Particularly difficult for artists is when they try to do an “interesting” project. In these cases, the City “often fights” the project, particularly if it is in a neighborhood where they will “notice”. This puts pressure on artists, many of whom are uneasy about the prospect of a prolonged fight with City Hall, to pursue projects in neighborhoods that are less likely to require official permission from an oversight authority. This strategy has its own risks, of course - if someone does notice, the project is likely to get

shutdown.

“I just do things and I hope... I ask for forgiveness.”

When looking at the issue of dealing with a city that does not seem to “get it”, focus group participants from the eastern neighborhoods pointed to an issue of education, or rather a lack thereof. “Just like how artists need education sometimes, I think that the city needs education,” said one participant. If the VACD community can work together to explain to the city why art is valuable, then the sector might be able to work with the city more effectively. According to the focus groups, CDCs may be best suited to assist in this role since they already have shown an appreciation for, and willingness to partner with, artists.

“There is a generation of children that weren’t raised with art or music and they’re not going to shows.”

The topic of education also extended to the public and, in particular, our city’s school-age children. “We’re starting to feel the repercussions of the cutbacks we made with our children,” a focus group participant from the eastern neighborhoods and suburbs explained, referencing the continued cuts to arts programs in public education.

“These children have this raw talent that no one has tapped into.”

Focus group participants believed reductions in arts education funding, coupled with a lack of widespread public art exposure has led to a generation of children who either were not exposed to the visual arts or had to go elsewhere in search of it. The result: children who may have otherwise pursued personal lives enriched and enlivened by the arts are left unaware of the opportunities. “I think sometimes that our education system has forgotten about that and they’re only focusing on the academics, which is awesome, but it doesn’t stimulate the mind.”

CREATIVITY AND COLLABORATION

“It’s funny to be living steeped in the Cleveland maker culture.”

A common thread is the VACD sector in Cleveland is highly creative while also being highly collaborative. This is in contrast to other cities referenced by focus group participants like San Francisco and New York which, though certainly creative, have a cutthroat atmosphere of competition. A participant from the Institutions focus group noted from experience that in New York, a student “going downtown prematurely and getting their work reviewed, and if it wasn’t a good review then they could kiss their career goodbye.” Cleveland, on the other hand, has a “much friendlier atmosphere toward the arts...I think it’s a place where people can come and feel supported.” This is also a place where failure is forgiven, a quality essential for successful innovation – it is not important how soon you fail, of paramount importance is how readily you rise from failure.

“You’d be surprised, competitive atmospheres in other cities, it’s pretty intense.”

This desire to work together so all might succeed, where everyone is “just helping each other” makes for a welcoming atmosphere, particularly for artists graduating from nearby educational institutions like the Cleveland Institute of Art. Such institutions, in turn, along with local charitable foundations, have found a niche to provide financial and organizational support to the VACD sector. “Institutions fill the vacuum in Cleveland” noted one focus group participant.

“It’s the cultural institutions that really are very active in promoting a sense of art and place.”

The institutional support is in many ways backed up by the presence of a sophisticated audience in Cleveland even if, as mentioned previously, the audience is limited in its size. The combination of a supportive yet sophisticated audience makes Cleveland, according to focus group participants, a great location to test out new and innovative visual arts formats and styles.

“It’s the bomb, as far as financially staying here and being able to make the best quality work possible.”

The focus group participants cited the largest challenge in improving collaboration and further leveraging creativity is the media gap. Focus group participants across the board cited this as an issue needing attention. A member of the eastern neighborhoods and suburbs focus group, citing a specific example, noted “Gallery One has been all over the *New York Times* [but not local media].” Another says, “We’re doing a public art project in Collinwood and all of our [media attention] - we have about 10 articles - and not ONE was written in Cleveland.” The discussion pointed to a need for a regular art column that would provide education to the public through professional art reviews and inform the audience on future events and what is happening in Cleveland’s arts scene.

“Other cities see our assets more than we do.”

Focus group participants believe limited local press attention is due in part to the lack of a dedicated art critic at the Plain Dealer. Others worry that the *CAN Journal*, a relatively new tool for artists to market themselves, is “a network to its own network” and is unable to reach the “average” person. Overall, the issue is complex, but it may be related to the small size of the VACD audience. A member of the Youth focus group put this in perspective, saying “Readers of the *CAN Journal* or the *Scene*, it’s all the same people. The same people that are going to art shows are going to be the same people that are going to pick-up the *Scene*.” This echo chamber effect may lead to further segmentation as existing outlets attempt to further tailor their message to the cohort rather than taking a risk and pursuing a broader audience.

“Why do we limit ourselves to [news coverage] that is average?”

Beyond the issues with media coverage and an existing small- to medium-sized audience as reported by participants, the focus groups wanted to see a regional strategy with better coordination to give direction to the arts. Because of the fractured nature of our region with regard to municipalities, it becomes difficult to identify projects from a regional perspective. The typical municipality wants a

project to be identified as having occurred within that municipality rather than “Greater Cleveland” or simply “Cleveland”. When projects are recognized nationally this issue becomes clearer - projects clearly should be identified to outsiders as having happened “in Cleveland”, instead are muddled by being tagged as having happened in any number of smaller, less well-known, cities and villages. “It’s an obstacle having all these municipalities and everyone fighting for their own unique identity and not necessarily bringing it all together as the greater area,” noted a focus group participant.

“It would be nice to identify the region as arts accessible.”

The focus groups believed marketing the region collectively is tied to the message of the area being “art accessible”. The pursuit of individual neighborhood and municipality identities is, then, both an advantage and curse if they cannot find a way to come together and show a united front to the world. Focus group participants cited CPAC and Cuyahoga Arts & Culture as the obvious choices to lead and organize a regional strategy. Because of such groups, the arts are particularly well-suited to develop a future regional strategy. This bodes well for greater efforts toward shared regionalism in Cleveland with respect to nearly every other issue - political, economic, or infrastructural.

***“We don’t really have a regional strategy for anything,
so the arts shouldn’t feel bad.”***

This statement confirms the perceived disconnect between the arts community and broader regional economic development efforts, which does not fully recognize the power of arts and culture in nurturing innovation and creativity according to focus group participants. Perceived as only a local amenity, the VACD sector, with its concentration of artists and activities in Cleveland, might be a significantly overlooked regional asset.

CHANGING PATTERNS & THE GENERATION GAP

***“You’ve got this generation of people who are not necessarily interested in
collecting things anymore... They’re more interested in experience(s).”***

The final major theme drawn from the focus groups is “Changing Patterns & the Generation Gap”. This speaks primarily to a change in the way younger generations interact with and embrace art. The visual arts sector has traditionally relied on the gallery model and the art collectors who frequented them as a means to ensuring its financial viability. The younger generations, however, are “not necessarily interested in collecting things anymore.... They want to get rid of things, [and are] trying to downsize.” This corresponds with a shift toward increased spending on experiences noted anecdotally in the literature. Thus, galleries are facing a paradigm shift which is pushing their longtime business model into obsolescence. The challenge is in finding ways to accommodate the browsing and experiential nature of the younger generations while staying in business.

***“[Art in] Cleveland, it is event driven.
There has to be an event to get people out, to participate.”***

A related issue, particularly when it comes to power brokers and their role in the region, is baby boomers have been delaying retirement as the Millennial generation is entering the workforce. This, according to the focus groups, has proven a difficult hurdle in creating a regional shift in priorities and mindset. “There’s a massive age difference. There’s an ‘Old Cleveland’ way of things and a ‘New Cleveland’ way of [doing] things.”

“Culturally, we still have sort of a traditional way of looking at things.”

This tension also manifests itself in how art is perceived and judged. Focus group participants believe Cleveland is rich with possibility and should therefore foster experimental art, including innovative public art. The politics of the art world, however, have limited this potential as those in power have decided which art is deemed “acceptable”, which often does not include the most avant-garde styles. “Public art has become, like, this guerilla thing that occurs in this city. When you see it and it’s interesting it’s because it was totally not legal, or you figured out some screwy way [to get a decision maker] to sign-off on it.”

“There’s so little allowance for interesting, even bad, public art.”

Much of this circles back to generational differences. A member of the eastern and suburban neighborhood focus group sums it up, “There are these really innovative and creative people who want to revive Cleveland...they just see a blank canvas, where the baby boomer generation remembers when things were different.”

“In general, people do feel that artists should work for love rather than for money.”

Baby boomers are, nonetheless, begrudgingly giving way to “New Cleveland”, but the process is a slow one. This ongoing conflict also manifests in the mindset that artists are not small businesses. Well-established organizations often ask artists for donations of art for fundraisers. Many artists are more than willing to help, but far too often the organizations are failing to price the art, and value the artist’s time, appropriately. This creates a systematic undervaluing of artworks, hurting not only the artists when they seek to sell other pieces, but other artists due to deflated market prices.

CHAPTER 4

CLEVELAND INDIVIDUAL ARTISTS SURVEY ANALYSIS

INTRODUCTION

Commissioned by the Community Partnership for Arts and Culture (CPAC), the Survey of Visual Artists engaged Northeast Ohio artists to augment the analysis Cleveland Visual Arts, Craft and Design (VACD) sector and its economic impact. Responses to the survey laid out the typology of the visual arts sector, quantified aspects of visual artists' earnings and purchasing, and qualified other life facets of a visual artist in Northeast Ohio.

METHODOLOGY

The Center for Economic Development (the Center) collected over 730 email addresses of VACD individuals and organizations to participate in the Survey of Visual Artists, which was conducted online and disseminated via email.¹²⁸ Using the Internet-based survey software *Qualtrics*, digital collection of the Survey of Visual Artists was conducted over an eight-week period starting on July 9, 2013. Potential respondents were emailed on consecutive Tuesdays. When respondents completed the survey, they were removed from future email advertisements.

The Center also publicized the survey via the Internet, Facebook, and through local partners who participated in interviews and focus groups to garner support and enhance participation in the survey. The research team attempted to collect names and emails from the VACD sector and promoted the survey at locations (i.e. art fairs, studios, farmers' markets, etc.) in the county to obtain the largest amount participation possible. The Center continued to collect new email addresses of individuals and groups throughout the survey process in order to maximize survey response numbers. In addition, an incentive was offered to respondents who completed the survey; specifically, they would be entered into a drawing to win one of two \$25 gift-cards.

This survey did not use any particular sampling method to select participants; in addition, it did not have data on the universe of artists in Cleveland from which to estimate a representative sample of artists for this survey effort. Consequently, the Center is not able to quantify any bias that may have occurred in this survey but does acknowledge the types of bias that can be detected based on survey responses. Survey participant selection bias may have occurred because the individuals and groups the Center solicited for participation were selected from a variety of Internet sources where email addresses and contact information were available and this selection was not random.¹²⁹ Selection bias also occurred due to the dissemination method and collection of this survey. If a potential respondent did not have an email address or a computer, they were not able to participate in the survey and were therefore not represented in the sample of respondents. Such nonresponse biases these estimates downward, but is uncontrollable based upon the information available at the time.

¹²⁸ For more information on the survey instrument, please see Appendix A.14.

¹²⁹ For more information on a listing of sources, please see Appendix A.15.

SURVEY ANALYSIS

The survey's primary goal was to gather information on amateur artists' perspectives on VACD sector as this data is not included in other measures of the sector; however, professional input was also welcome. Professional/amateur status was determined by the answer to the question "What portion of your personal income (or family income) comes from selling visual art?" If an individual selected a response indicating that 51% or more of their income derived from selling art, then s/he was considered a professional. If the respondent indicated that personal income from selling art was 50% or less, they were considered an amateur artist.

Respondent Demographics

Examining the overall response trends to the Survey of Visual Artists helps explain the motivations and reasoning behind participant answers. Table 6 displays respondent counts by geographic location, amateur/professional status, totals for each sub group, and the overall respondent count. A total of 185 respondents completed the survey. Of those 185, 150 reside within Cuyahoga County, and 35 reside outside of the county. Among all of the survey respondents, 28% (51 respondents) were determined to be professional artists, 67% (124 respondents) were amateur artists, and 5% (10 respondents) did not indicate their amateur/professional status.

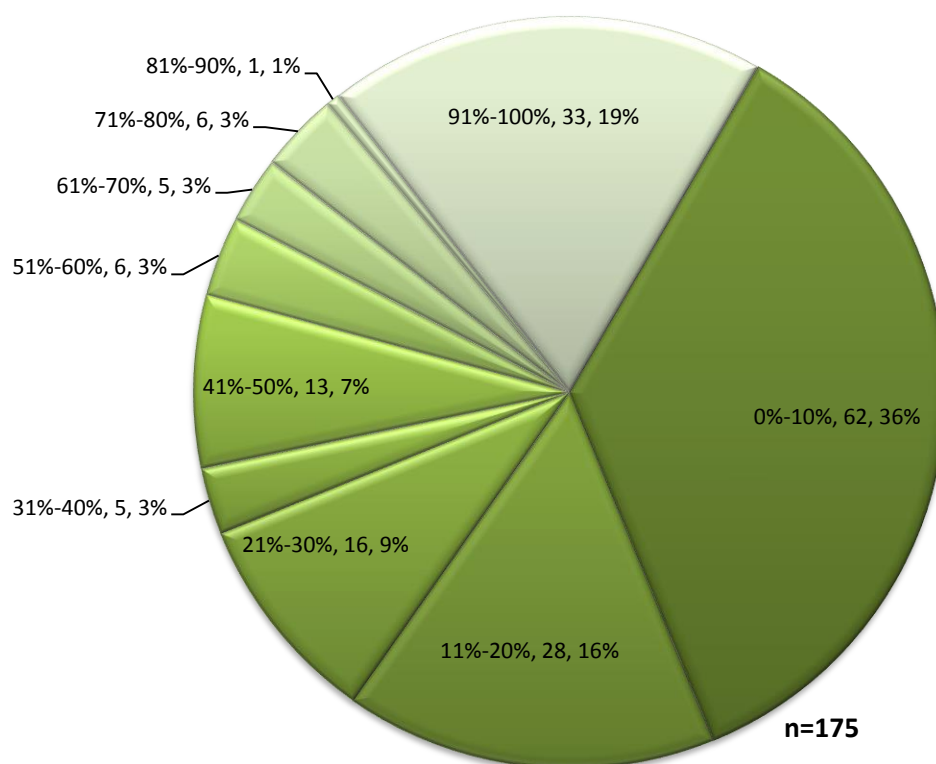
Table 6: Geographic Location of Respondent by Amateur/Professional Status

Geographic Location	Amateur/Professional Status							
	Amateur		Professional		Non-Response		Total	
	Count	% of Count	Count	% of Count	Count	% of Count	Count	% of Count
Live in Cuyahoga County	98	65%	44	29%	8	5%	150	100%
Do not Live in Cuyahoga County	26	74%	7	20%	2	6%	35	100%
Total	124	67%	51	28%	10	5%	185	100%

Over 83% of respondents have had some formal training in visual arts. This percentage is somewhat higher for professionals (90%, 46 respondents) than amateurs (80%, 105 respondents). All of the educational institutions and organizations where respondents received their training possess prestigious art programs. The most frequent response was the Cleveland Institute of Art, followed by Kent State University, Cleveland State University, Cooper School of Art, and Baldwin Wallace University. Esteemed Institutions on this list also included Oberlin College, Rochester Institute of Technology, Rhode Island School of Design, the New School in New York City, and Parsons School of Design in New York City. The quantity and quality of art education speaks to the depth of the visual arts sector in Cuyahoga County for professionals and amateurs alike.

Figure 21 visually depicts responses regarding the portion of respondent income/family income that is derived from visual art sales. The figure clearly shows respondents treated their art as either a hobby contributing little to their overall income (0%-10%, 36%), or as their primary career (91%-100%, 19%). These two categories accounted for 55% of responses for this question. From this question, the study designated amateur and professional status, designations that were used throughout the survey's analytic process.¹³⁰

Figure 21: Portion of Income/Family Income from Selling Visual Arts, All Respondents



Data in Figure 21: Answer Choice, Number of Respondents, Percentage of Total Respondents

Table 7 exhibits the length of time respondents have been involved in creating visual art, and most have created art for at least eleven years. In fact, regardless of status, the majority of respondents have created art for more than twenty years. However, these responses also parallel the “graying” of the workforce across the country, especially in Northeast Ohio – also known as the Silver Tsunami. The median age in Cuyahoga County in 2000 was 37.3¹³¹ but jumped to 40.2 in 2010,²³ revealing a 7.8% increase in the median age. Further investigation into the implications and consequences of these findings should be made so public policy initiatives can be created to address the aging artist workforce in Northeast Ohio.

¹³⁰ Those who earned less than 50% of their income were determined to be amateur artists; and those that earned 51% or more of their income was professional artists.

¹³¹ US Census Bureau, 2000 Decennial Census

²³ US Census Bureau, 2010 Decennial Census

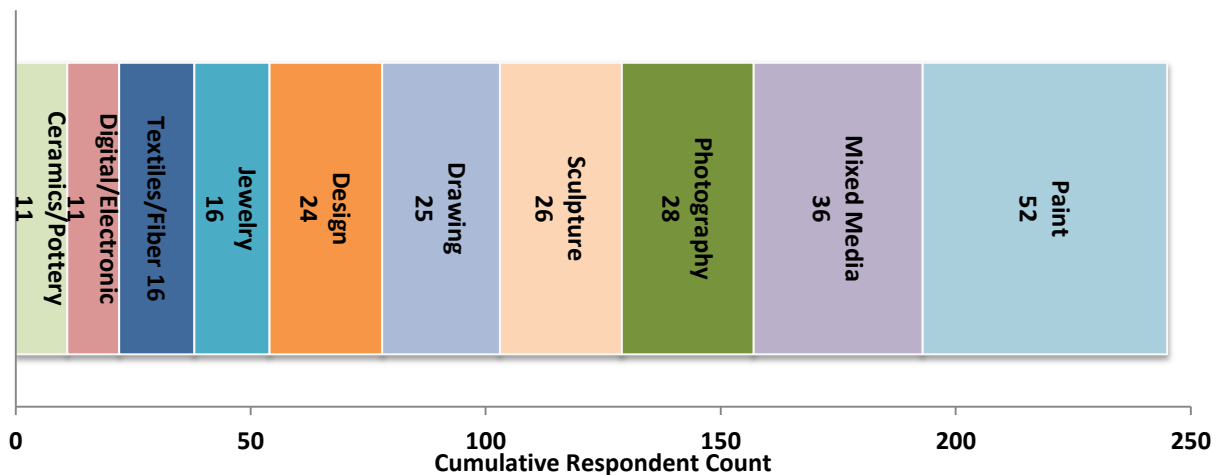
Table 7: Length of Time Creating Visual Arts by Amateur/Professional Status

Length of Time Creating Visual Arts	Artists Status					
	Amateur		Professional		Total	
	Count	% of Count	Count	% of Count	Count	% of Count
Less than 5 years	3	2%	1	2%	4	2%
6 to 10 years	21	16%	5	10%	26	14%
11 to 20 years	28	22%	18	35%	46	25%
More than 20 years	78	60%	27	53%	105	58%
Total	130	100%	51	100%	181	100%

Survey of Visual Artists Responses

When asked, “What do you consider as your primary medium/media?” respondents were allowed to select multiple options in order to accurately encompass their art-related activities. Overall, 287 responses were collected. Figure 22 displays the top ten aesthetic mediums from all respondents, disregarding their sub-classification. The most popular medium was *Paint* with 52 respondents, followed by *Mixed Media* (36 respondents), and *Photography* (28 respondents). The top ten primary mediums in Figure 2 represent 85% of responses (245 responses) to this question.

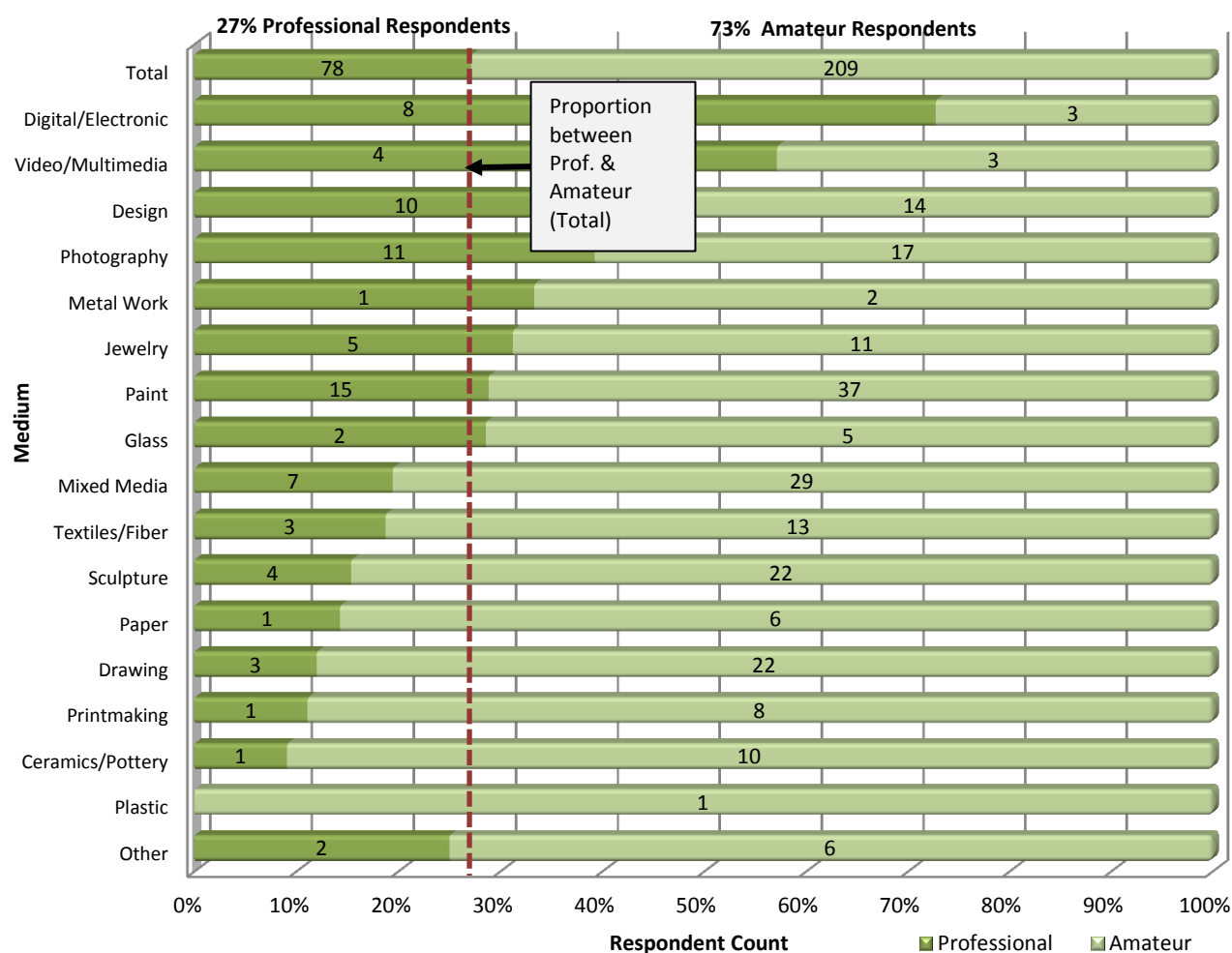
Figure 22: Top 10 Primary Medium(s), All Respondents



Note: Respondents were able to select more than one answer

Figure 23 displays the selections from respondents regarding their primary medium(s) and organized by amateur/professional status. Examining these responses reveals that 27% of professionals (78) and 73% of amateurs (209) answered this question (Figure 3). The red line in Figure 18 indicates the 27% baseline of the expected average for each medium based upon the total proportion of professional to amateur respondents. Only amateur respondents indicated that their primary medium was Plastic (1), and Ceramics/Pottery captured the highest proportion of amateur respondents (90%, 10 respondents).

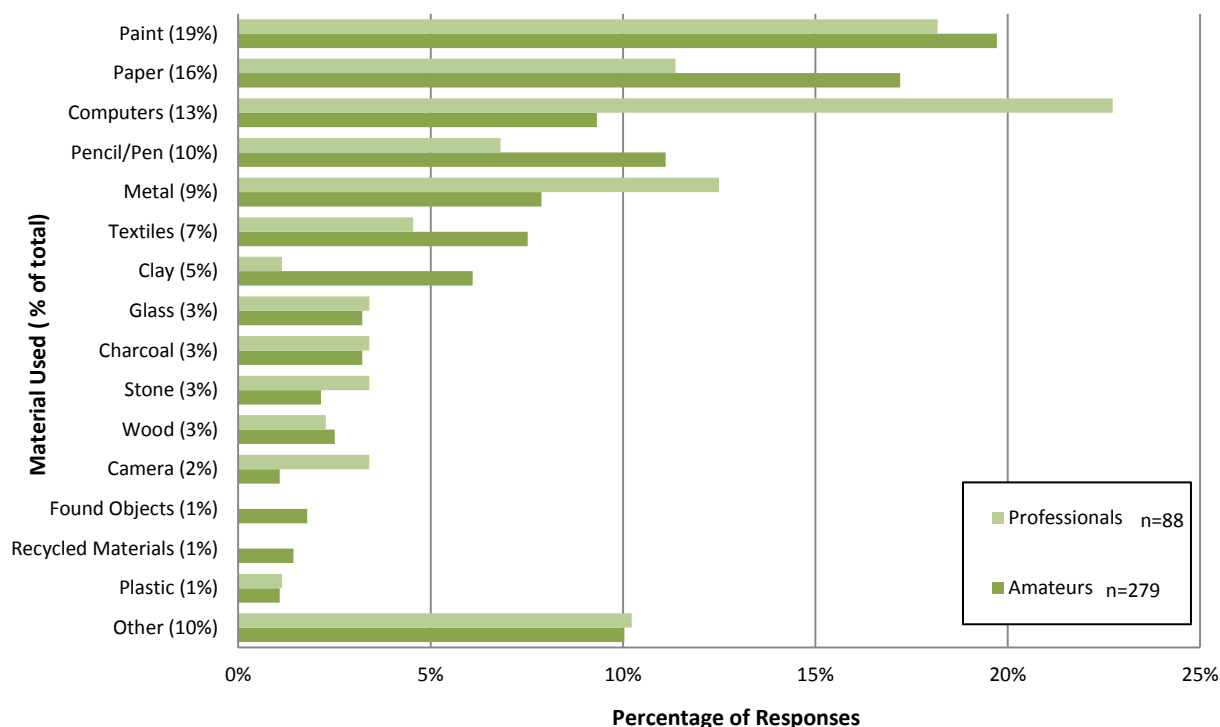
Figure 23: Primary Medium(s) by Amateur/Professional Status



Note: Respondents could select more than one answer

Respondents were asked about their primary art medium and the materials they use in order to create their art. It was not surprising that among all selections (367) the category with the highest frequency was paint (19%, 17 selections), especially since painting was the most selected medium. Curiously, Figure 24 reveals a larger percentage of amateur artists (20%, 55 respondents) using *Paint* as a primary material than professional artists (18%, 16 respondents), despite *Paint* being the most selected primary medium among professionals. Professionals reported a greater use of *Computers* (23%, 20 respondents) than amateurs (9%, 26 respondents), while more amateurs than professionals favored *Paper* (17%, 48 amateur respondents versus 11%, 10 professional respondents).

Figure 24: Primary Material Used by Amateur/Professional Status



Note: Respondents could select more than one answer

Table 8 expands on Figure 24 and shows respondent's primary material percentage according to medium. Most of these responses were anticipated, in that respondents tended to choose the material needed for their primary medium. For example, 39.7% of those who classified their primary medium as *Paint* said they use *Paint* as their primary material, 13.5% indicated they used *Paper*, and 10.3% use *Pencil/Pen*. What was somewhat surprising was the pervasiveness of *Computers* across mediums; and examples of responses of materials individuals used for work in *Other* categories were *Wood*, *Mosaics*, and *Mixed Media*.

Table 8: Respondent's Primary Medium by Primary Material, as a Percentage of Total Medium

		Respondent's Primary Medium															
		Ceramics/ Pottery	Design	Digital/ Electronic	Drawing	Glass	Jewelry	Mixed Media	Paint	Paper	Photography	Plastic	Print Making	Sculpture	Textile/ Fiber	Video/ Multimedia	Other
Respondent's Primary Material	Charcoal	8.0%	4.8%	0.0%	9.2%	0.0%	4.4%	3.8%	5.6%	8.7%	3.0%	0.0%	0.0%	2.9%	0.0%	4.5%	2.6%
	Clay	44.0%	6.3%	0.0%	2.3%	5.6%	6.7%	1.9%	2.4%	8.7%	1.5%	0.0%	3.0%	7.4%	4.9%	0.0%	10.3%
	Computers	0.0%	22.2%	38.5%	6.9%	5.6%	8.9%	6.7%	4.8%	17.4%	26.9%	0.0%	9.1%	11.8%	4.9%	22.7%	5.1%
	Glass	4.0%	0.0%	3.8%	0.0%	38.9%	6.7%	3.8%	1.6%	0.0%	0.0%	0.0%	3.0%	1.5%	4.9%	4.5%	5.1%
	Metal	0.0%	9.5%	3.8%	3.4%	27.8%	26.7%	8.7%	2.4%	0.0%	3.0%	20.0%	6.1%	14.7%	4.9%	4.5%	12.8%
	Paint	12.0%	9.5%	15.4%	17.2%	5.6%	13.3%	21.2%	39.7%	13.0%	9.0%	20.0%	21.2%	10.3%	14.6%	13.6%	12.8%
	Paper	4.0%	12.7%	23.1%	24.1%	0.0%	4.4%	14.4%	13.5%	21.7%	22.4%	20.0%	18.2%	11.8%	12.2%	13.6%	10.3%
	Pencil/Pen	8.0%	11.1%	7.7%	21.8%	0.0%	4.4%	8.7%	10.3%	13.0%	4.5%	20.0%	15.2%	7.4%	7.3%	13.6%	5.1%
	Plastic	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.8%	0.0%	4.5%	20.0%	3.0%	4.4%	0.0%	4.5%	2.6%
	Stone	8.0%	3.2%	0.0%	2.3%	5.6%	13.3%	1.9%	2.4%	8.7%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	10.3%
	Textile	8.0%	3.2%	0.0%	4.6%	5.6%	6.7%	8.7%	5.6%	8.7%	4.5%	0.0%	6.1%	7.4%	36.6%	9.1%	5.1%
	Other ¹³²	4.0%	17.5%	7.7%	8.0%	5.6%	4.4%	18.3%	11.1%	0.0%	20.9%	0.0%	15.2%	20.6%	7.3%	9.1%	17.9%

Note: Respondents could select more than one answer for both primary medium and primary material

¹³² Other categories include *Wood*, *Mosaics*, and *Mixed Media*.

Furthermore, the survey inquired into consumer trends among artists to determine whether or not there is a local supply-chain for art materials in the Northeast Ohio area. Of the 167 respondents who indicated that they purchased some material locally, 86 reported that they purchase 51% or more of their art-related material locally (Table 9). Cuyahoga County residents were divided almost equally between those purchasing less than 50% of their material locally (51% or 75 respondents) and those purchasing over 50% of their art material locally (49% or 71 respondents).

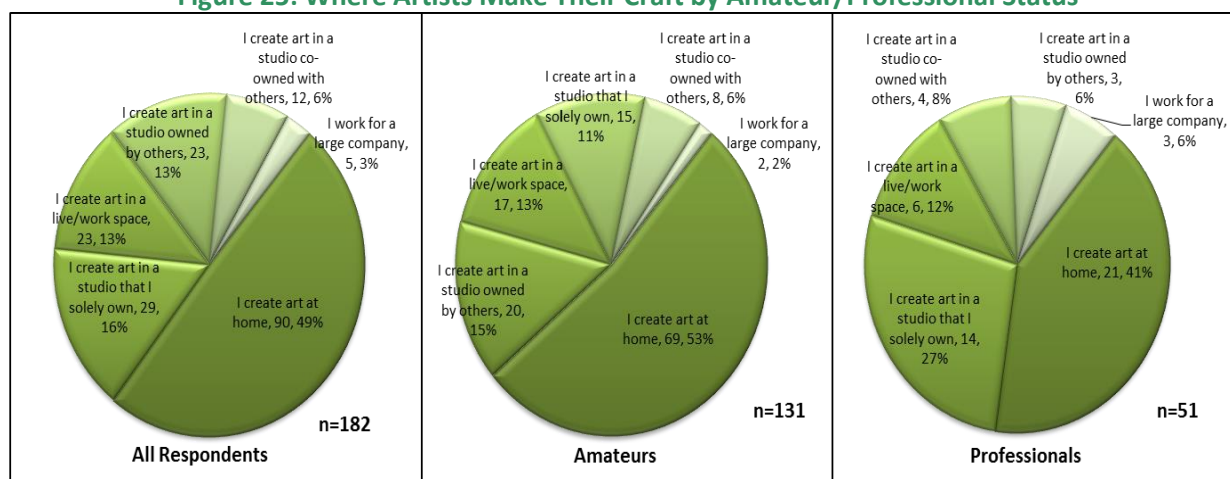
Table 9: Percentage of Materials Purchased Locally by Geographic Location of Respondent

% Materials Purchased Locally	All Respondents		Live in Cuyahoga County		Do Not Live in Cuyahoga County	
	Respondent Count	Percentage	Respondent Count	Percentage	Respondent Count	Percentage
0%	13	7%	9	6%	4	12%
1%-10%	23	13%	19	13%	4	12%
11%-20%	18	10%	15	10%	3	9%
21%-30%	10	6%	9	6%	1	3%
31%-40%	9	5%	8	5%	1	3%
41%-50%	21	12%	15	10%	6	18%
51%-60%	6	3%	5	3%	1	3%
61%-70%	7	4%	7	5%	0	0%
71%-80%	22	12%	16	11%	6	18%
81%-90%	19	11%	15	10%	4	12%
91%-100%	32	18%	28	19%	4	12%
Total	180	100%	146	100%	34	100%

In addition to surveying artists' geographic location respective to Cuyahoga County, we also polled respondents on the location types —studio, home, live/work space—in which they tend to work. These results indicate the kind of support mechanisms in place for artistic creation.

Figure 25 displays the responses to: "Where do you make your craft?" among amateurs and professionals. Almost 50% of respondents stated that they create art at home and is consistent among amateurs (53%) and professionals (41%). However, more professionals reported that they create art in a studio that they own (27%) than amateurs (15%).

Figure 25: Where Artists Make Their Craft by Amateur/Professional Status

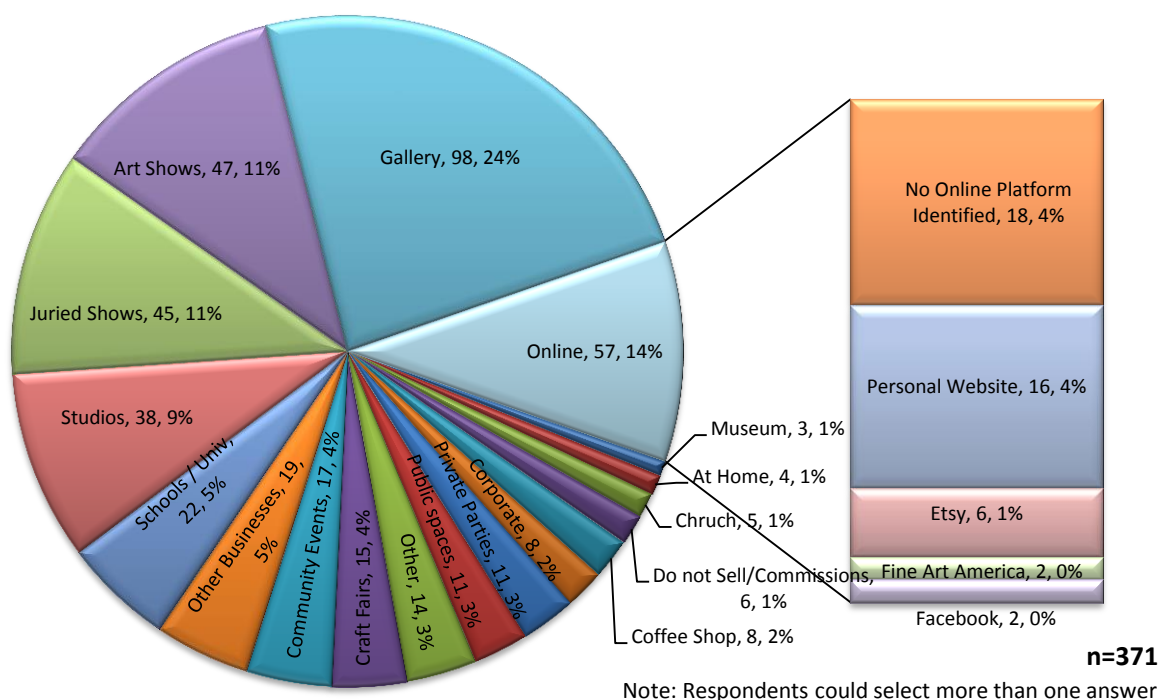


Another important element to discerning the market for art in Northeast Ohio is determining where artists and consumers exchange goods. Consequently, the survey measured the types of venues and locations where artists sell and display their goods; Figure 21 reflects these responses.

Most respondents indicated that their art is displayed in *Galleries* (24%), *Art Shows* (11%), *Juried Shows* (11%), and *Studios* (9%). The questionnaire provided 14 answers to this question, but respondents wrote in *Museum*, *At Home*, and *Do not Sell/Commissions* for *Other* so often that these responses are included in Figure 26.

It was important to the research team to understand how the Internet has facilitated the display and sale of art. When artists responded that they displayed their art online, a write-in text box was provided for artists to specify the online platform they use. Most artists use their own personal website, with a small amount using Etsy, Facebook, and FineArtAmerica.com.

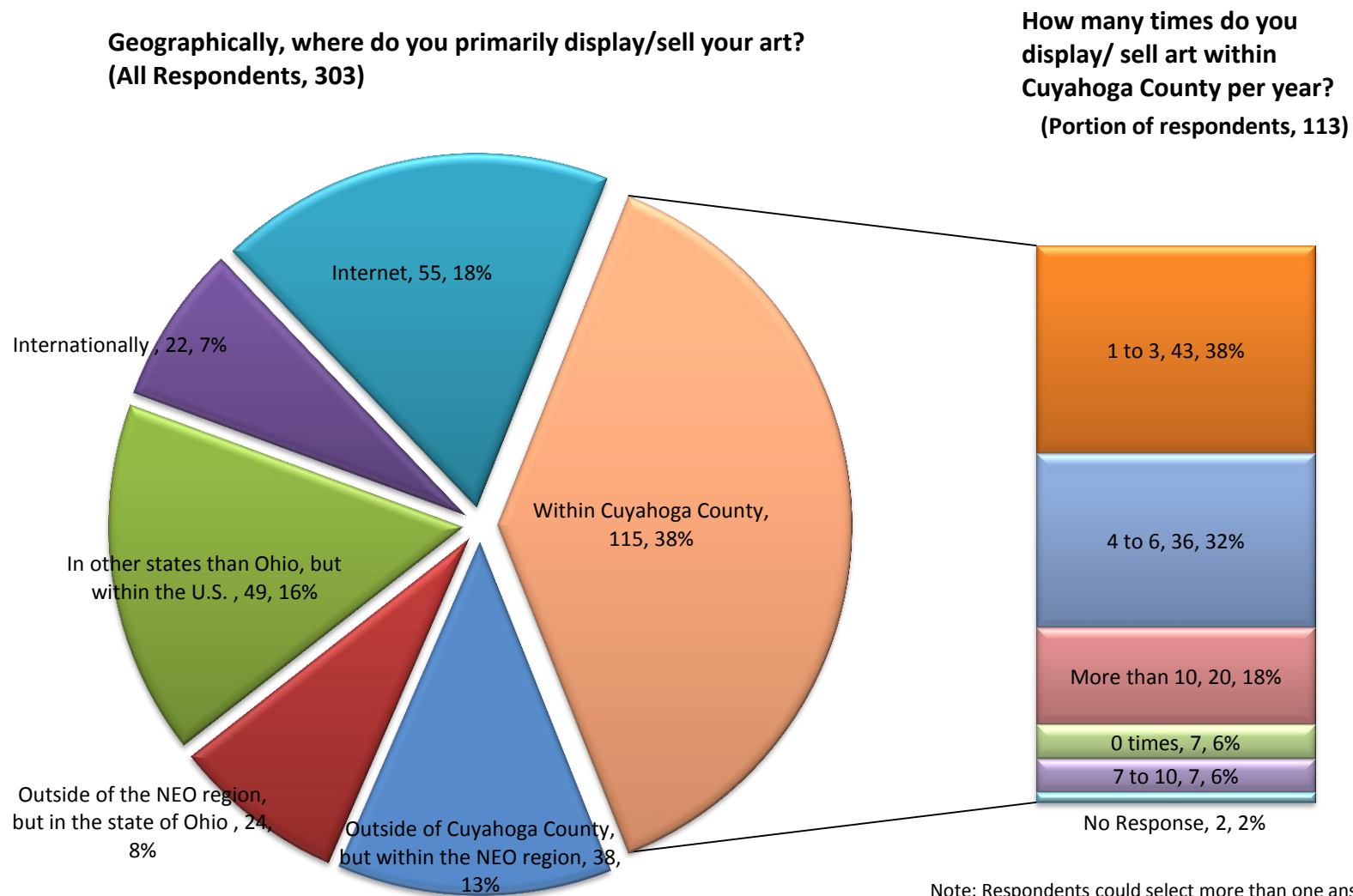
Figure 26: Locations Where Artists Sell/Display Art, All Respondents



Quantifying geographic location and venue type are important for economic development and public policy. Thus, participants were asked, “Geographically, where do you primarily display/sell your art?” If a respondent selected Cuyahoga County, they were asked the follow-up question, “How many times do you display/sell art within Cuyahoga County per year?” Figure 27 depicts the results of these two questions.

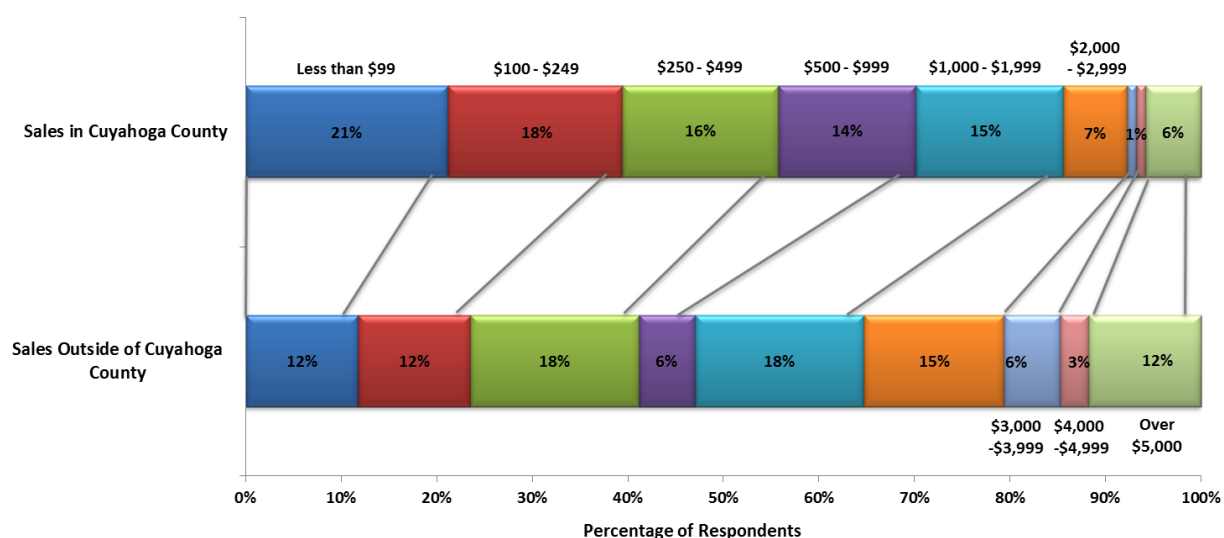
Generally, most respondents (38%) sell their art in Cuyahoga County. Surprisingly, the second most selected response was the Internet (18%). This first and second ranking held for all of the subgroups: professional, amateur, Cuyahoga County residents, non-residents of Cuyahoga County. A large majority of Cuyahoga County residents (70%) sell their art in Cuyahoga County 1 to 6 times a year.

Figure 27: Where Artists Geographically Display Their Art, All Respondents



Below, Figure 28 exhibits the spectrum of income earned per art display by all respondents in- and outside of Cuyahoga County. There are some differences between the two geographies, but it is inconclusive whether venues in Cuyahoga County are more lucrative than those outside of Cuyahoga County as artists' targeted price points also affect their earnings.

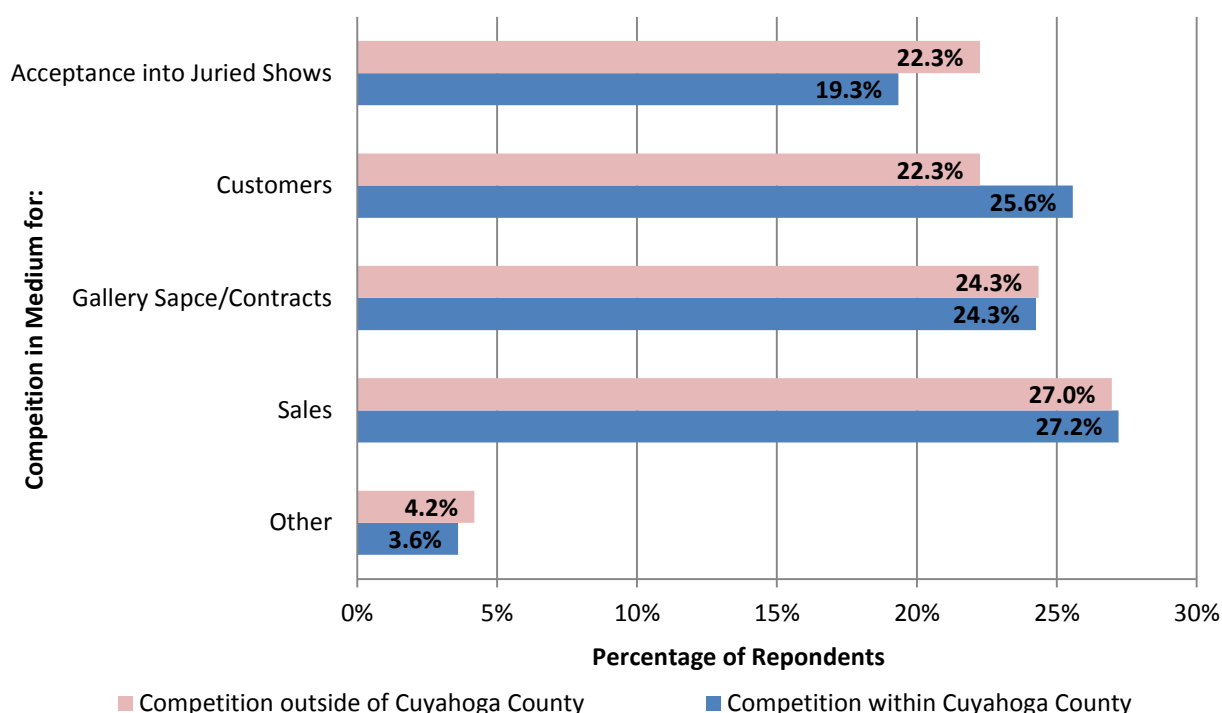
Figure 28: Income Earned Per Art Display, All Respondents



The next question focused on competition for artists working in- and outside of Cuyahoga County. The purpose of this query was to determine where competition comes from so that public policies are shaped to best aid these artists. Depending on where the respondent sold art, s/he was then asked certain follow-up questions regarding competition in their geographic location.

Figure 29 examines replies from all survey participants on competition in- and outside of Cuyahoga County. Among all respondents, there seems to be a correlation between sales and gallery space/contracts in the two different geographies. *Juried Shows* outside Cuyahoga County seem to experience greater competition, while artists in Cuyahoga County encounter more competition from *Customers*.

Figure 29: Competition within Medium, All Respondents



Note: Respondents could select more than one answer

CONCLUSION

Overall, the Survey of Visual Artists had a response rate of 25% (185 respondents). The majority of respondents (150) lived within Cuyahoga County and 35 resided outside the county; 51 respondents were determined to be professional artists and 124 amateurs. In addition, disregarding the status (amateur or professional) there seems to be an overall aging of the artist community, paralleling trends seen throughout the entire workforce in Ohio.

Over 83% of respondents have had some formal training in visual arts, with the most frequent response the Cleveland Institute of Art, followed by Kent State University, Cleveland State University, Cooper School of Art, and Baldwin Wallace University. The quantity and quality of education training of artists of all kinds speaks to the depth of the visual arts sector in Cuyahoga County for professionals and amateurs alike.

CHAPTER 5

CLEVELAND ART FAIRS: SUPPLY AND DEMAND

INTRODUCTION

This chapter of the Cleveland Visual Arts, Craft and Design (VACD) sector report is designed to assess and compare supply and demand of artists, crafters, and designers in Cleveland as well as art-related products. Through evaluating the economic market of individuals and their products in the VACD, it is feasible to visualize the supply and demand of these goods throughout the broader geography of Cuyahoga County.

Dovetailing off of Chapter 2: Occupational Analysis of the Cleveland VACD Sector, which describes occupations and occupational employment in the VACD – the supply of workers in this sector, this chapter examines viewpoints beyond available federal statistical data. This chapter compiles information about the supply and demand of VACD workers and their skills from in-person interviews, focus groups, and surveys conducted by the research team in order to enrich data in regard to what is the existing perceptions and reality within this sphere.

PERCEPTIONS OF SUPPLY AND DEMAND

Personal interviews and focus groups were conducted in order to interpret local artists' perceptions of the supply and demand of the Cleveland VACD sector. Overall, the majority opinion of interviewees and survey participants is the supply of art and artists is a complex phenomenon. It is not as simple to say supply does not equal demand, and there are more artists than consumers of art in Cuyahoga County. To the contrary, many of those interviewed by the Center stated there was a large network of buyers in the Cleveland region who spent a sizeable amount of money on art, but not necessarily on local art. Many artists believed art patrons would only purchase art from a Chicago or New York artist at twice the price of local artists because it was "from Chicago" or "from New York."

To those consumers of art with which the research team spoke admitted the Cleveland arts scene was one where high quality art could be purchased for minimal cost. All active participants of this sector did quickly admit those not immersed in the Cleveland art scene do not see its richness and breadth, and therefore do not appreciate and purchase it readily. Many interviewees noted arts and culture consumers are not fully educated about Cleveland's arts scene, but admit artists have not been very active in carrying out such educational outreach. Moreover, they discussed how artists as a group can be insular and how it is often the same individuals who attend arts events.

Perceptions of supply and demand from interviews conducted by the research team and focus groups align with quantitative data from surveys and federal data collected. There is a rich supply of artists, crafters, and designers within Cuyahoga County and Northeast Ohio as well as market capacity to include the next generations of artists. Moreover, there is a demand for art products all types from local and national artists by those who live within the region.

So, where does that leave us? Cleveland has a rich and active visual art, craft and design scene; and it has a sizeable amount of consumers of arts (from purchasing at art fairs to spending thousands in a gallery). However, it is matching these producers and consumers beyond the individual level – but to a magnitude that it will appreciably affect the economy – that is important to attain.

THE REALITY OF SUPPLY AND DEMAND

In order to gather quantitative data on the supply and demand of art and art-related activities in Cuyahoga County, the research team disseminated several surveys to capture this information and collected secondary data from federal data sources such as the National Center for Education Statistics.

The research team attended art fairs and festivals¹³³ throughout Cuyahoga County surveying artists¹³⁴ and individuals who attend these events in order to gauge the participation of the supply and the demand sides. Researchers surveyed participants in face-to-face intercepts in order to further delineate the typology of the visual arts sector, quantify aspects of visual artists' earnings and purchasing, as well as qualify further facets of the life of a visual artist in Northeast Ohio. The research team attended eight events throughout the summer of 2013.¹³⁵

The Survey of Galleries, Shops, and Studios was a phone-based survey to solicit open-ended responses in regard to varied questions of their operations.¹³⁶ Data was gathered and analyzed to understand the role of galleries and shops involved in the VACD sector and learn about the local demand for visual arts satisfied through the supply provided by galleries and shops. In order to contact these establishments, the Center for Economic Development (the Center) collected information on almost 100 galleries, shops, and studios. To call all of these establishments, the master list of organizations was compiled across three categories: 1) retail stores and shops, 2) auction houses, and 3) galleries. Respondent calls were made over a two-week period in August 2013, and 21 responses were gathered (over 20% response rate).

SUPPLY OF ARTISTS

Degrees Conferred in Cuyahoga County

Cuyahoga County undoubtedly has a rich stock of educational institutions, which produce an ample supply of artists. Table 10 displays degrees conferred in art in Cuyahoga County from 2008 to 2012, noting that some colleges and universities do not distinguish between art and music degrees – those institutions are demarcated with a star. Moreover, it is important to note individuals can major in subjects other than art, but still become artists; these artists are not accounted for in Table 10. Moreover, individuals who attend Cuyahoga County educational institutions can come from all over the United States and the world. According to the University System of Ohio, the retention rate of Ohio

¹³³ For more information on the Survey Instrument for Visitors of Art Fairs and Festivals, please see Appendix A.16.

¹³⁴ For more information on the Survey Instrument for Artists at Art Fairs and Festivals, please see Appendix A.17.

¹³⁵ For a listing of events attended see Appendix A.18.

¹³⁶ For more information on the survey instrument, please see Appendix A.19

residents in the Arts and Humanities in 2011 for bachelor degrees was 68%, master degrees 69%, and doctoral degrees 67%.¹³⁷

Overall, art degrees conferred in Cuyahoga County account for 3.5% to 7.0% of degrees conferred at these eight institutions from 2008 to 2012. Examining the educational institutions conferring degrees in Table 10 and Figure 30 shows the exceptional variety of skill levels from associate to doctorate degrees. This variety of programming is an asset to the workforce development system of Cuyahoga County, and filling the replacement rate for the supply of artists exiting the workforce due to retirements. This is important because the Survey of Visual Artists reinforced that no matter of amateur or professional status, a majority of respondents reported they had been creating art for more than 20 years, indicating they were on the mature side of the production cycle. It is important to continue to have an appropriate supply of new artists entering the workforce.

Table 10. Degrees Conferred in Art in Cuyahoga County, 2008-2012

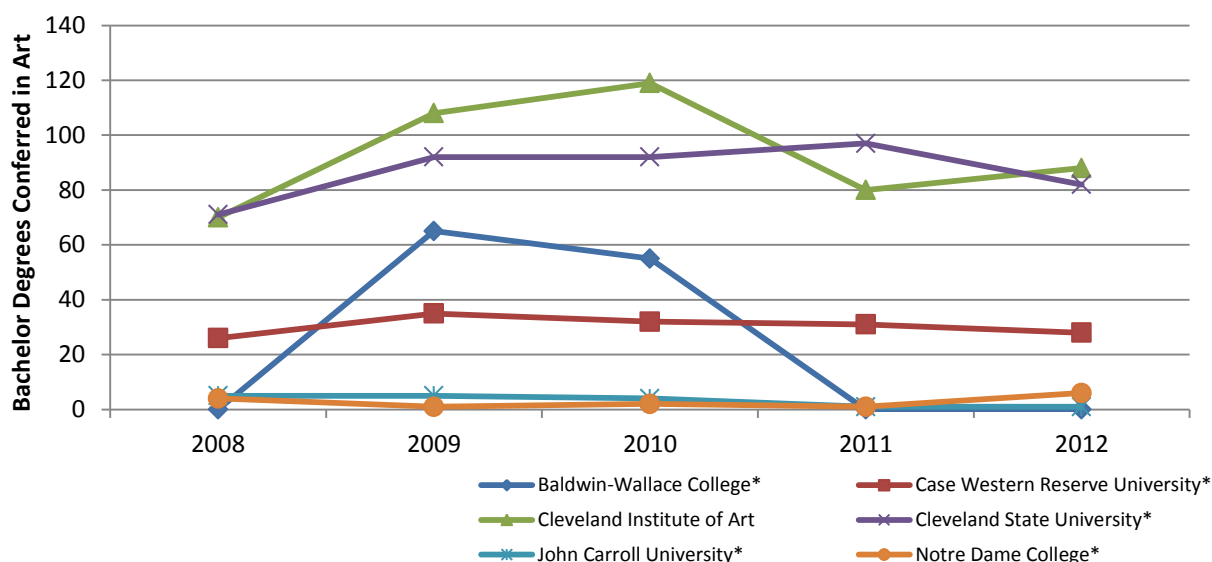
College/University	City of College/University	Degree Conferred	2008	2009	2010	2011	2012
Baldwin-Wallace College* (now Baldwin Wallace University)	Berea	Master	0	65	55	0	0
		Bachelor	69	285	253	70	75
		Associate	0	7	1	0	0
Case Western Reserve University*	Cleveland	Doctorate	2	5	0	0	0
		Master	19	20	26	10	20
		Bachelor	26	35	32	31	28
Cleveland Institute of Art	Cleveland	Bachelor	70	108	119	80	88
Cleveland State University*	Cleveland	Master	11	10	18	18	17
		Bachelor	71	92	92	97	82
Cuyahoga Community College*	Cleveland	Associate	55	45	42	60	54
John Carroll University*	Cleveland	Bachelor	5	5	4	1	1
Notre Dame College*	Cleveland	Bachelor	4	1	2	1	6
Virginia Marti College of Fashion and Art	Lakewood	Associate	59	44	38	33	39
TOTAL (% of All Degrees Conferred)	-	All Degrees Conferred	391 (3.9%)	722 (7.0%)	682 (6.2%)	401 (3.5%)	410 (3.6%)

Note: *Art and Music degrees conferred

Source: National Center for Education Statistics

¹³⁷ In-State Retention and Salary Analysis of Spring Graduates, 2007 to 2011
https://www.ohiohighered.org/sites/ohiohighered.org/files/graduates_employment_sp07-11_grads.pdf

Figure 30. Bachelor Degrees Conferred in Art, 2008-2012



Note: *Art and Music degrees conferred

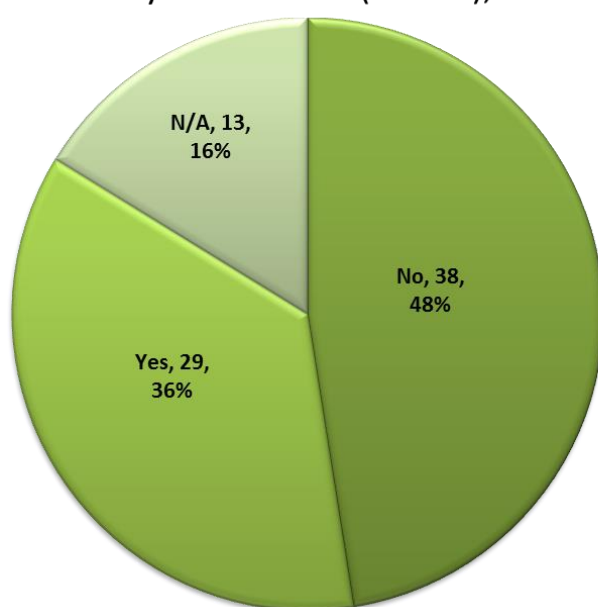
Source: National Center for Education Statistics

Working as an Artist

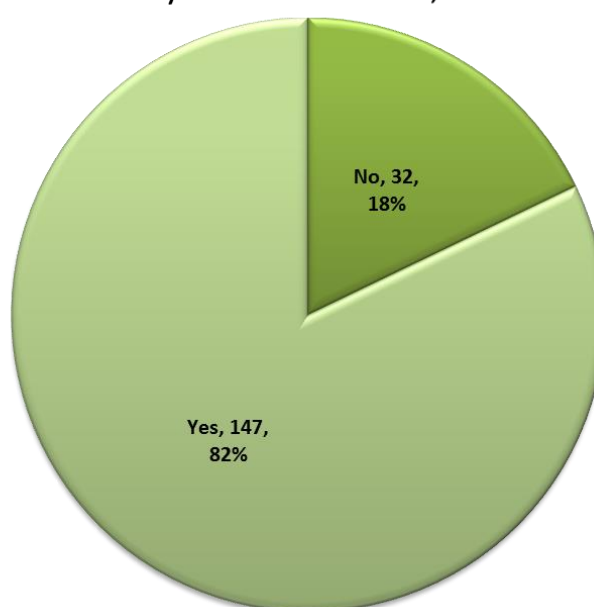
Beyond those who have graduated from Cuyahoga County academic institutions are those visual artists, crafters, and designers working full- and part-time in the field. Among the Center's data gathering techniques, Figure 31 displays responses from two surveys on responses to the question, "Is your primary occupation a visual artist, crafter, or designer?" Collectively, the majority of those surveyed through both efforts identified being a visual artist, crafter, or designer as their primary occupation.

Figure 31. Is Your Primary Occupation a Visual Artist, Crafter, or Designer?

Survey of Arts Fairs (Artists); n=80



Survey of Visual Artists; n=179

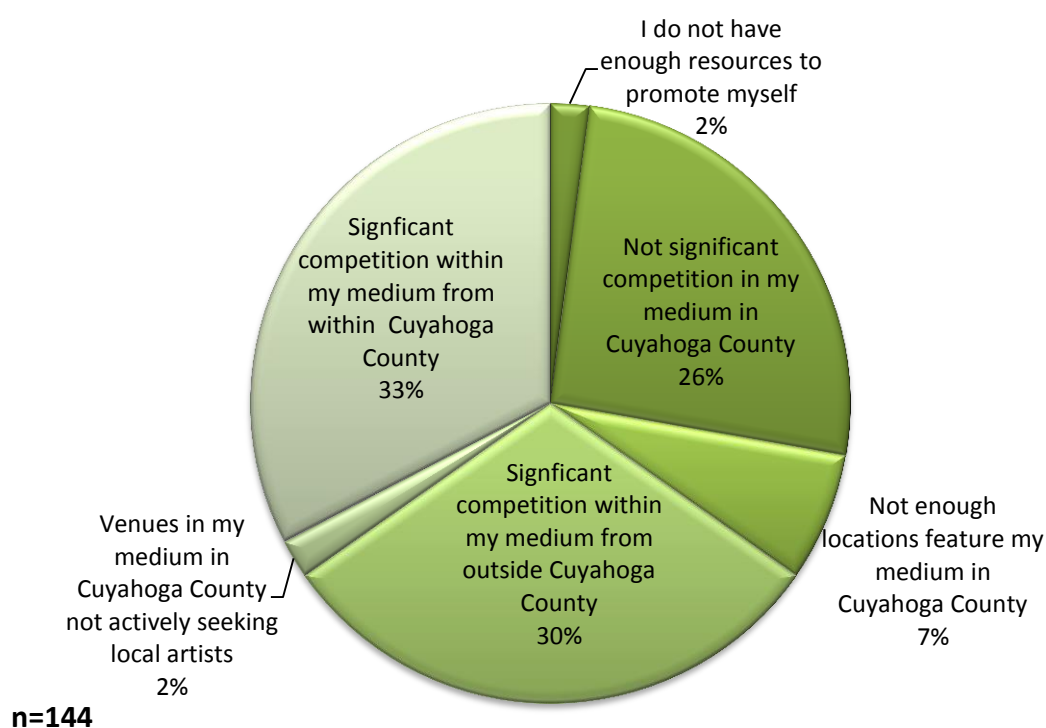


SUPPLY OF ART

Understanding how these artists perceive the competition within their medium has implications for the supply of artists within Cuyahoga County and Northeast Ohio. Analyzing data from artist responses in the Survey of Art Fairs and Festivals reveals most artists have the impression, within their medium, that there is significant competition within and outside of Cuyahoga County (Figure 32).

Specifically, 33% of respondents said they believed competition existed from inside Cuyahoga County, and 30% of respondents said they believed competition existed from outside of Cuyahoga County. These responses provide evidence to support the perception espoused during the interviews and focus groups that a large supply of artist exists in the greater Cleveland area.

Figure 32. Artists' Perception of Competition in Medium by Location



Note: Respondents could select more than one answer

DEMAND FOR ART & ARTISTS

Purchasing and Commerce

One way to estimate the demand for art and artists is to evaluate the ratio of VACD establishments per person in a given geographic area. This ratio is designed to represent the number of residents living in a region per every one establishment. Through the laws of supply and demand, the more people who demand a product, the more the market will look to supply that good; therefore, if consumers demand a product (art) then the market will look to set up (additional) establishments to provide that good.

This evaluation is possible using data gathered from the U.S. Bureau of Labor Statistics' Quarterly Census of Employment and Wages (QCEW) database and population counts from the 2010 U.S. decennial

census provided by the U.S. Census Bureau. This data was gathered for the Cleveland-Elyria-Mentor MSA, and four additional MSAs utilized for comparative purposes: Cincinnati, OH; Columbus, OH; Indianapolis, IN; and Pittsburgh, PA.

As seen in Table 11, the Cleveland, OH MSA has the second smallest ratio of MSAs depicted in the table (2,241 residents to 1 establishment), exceeded only by the Cincinnati, OH MSA. This implies the greater Cleveland area has a larger total number of establishments than most of the comparable MSAs available to service the art demand of local residents. By extension, the Cleveland MSA, because of its large number of establishments, has a larger demand for art and art-related activities than the other four MSAs.

Table 11. Ratio of Persons per VACD Establishment by MSA, 2010

	Metropolitan Statistical Area (MSA)				
	Cleveland, OH	Cincinnati, OH	Columbus, OH	Indianapolis, IN	Pittsburgh, PA
Population	2,077,240	1,625,406	1,836,536	1,756,241	2,356,285
No. of Establishments	927	841	691	745	885
Ratio (Persons per Establishment)	2,241	1,933	2,658	2,357	2,662

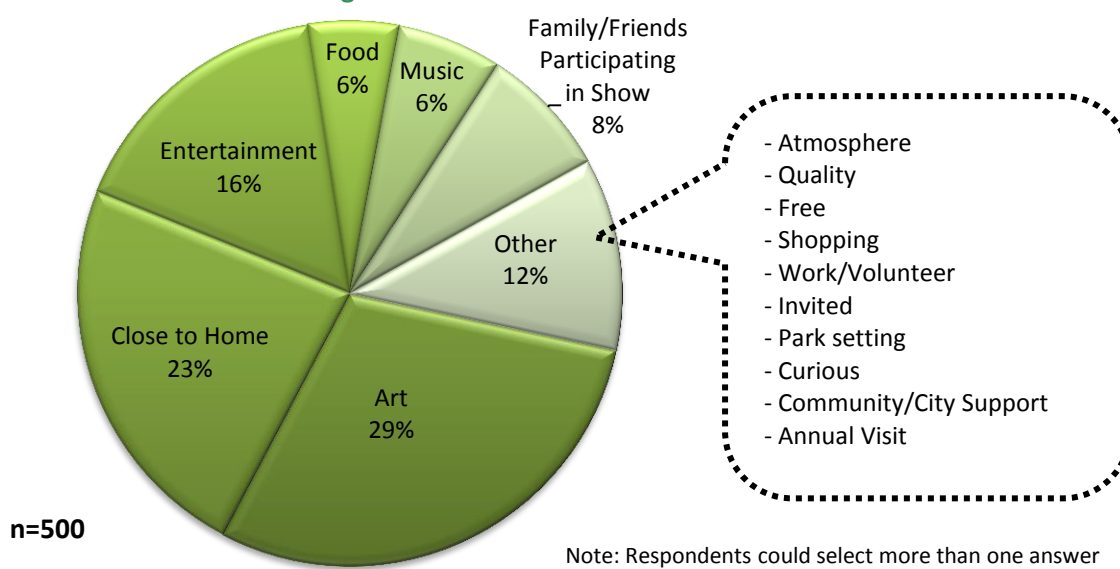
Note: Total Population; Establishments derived from primary VACD NAICS only

Sources: U.S. Bureau of the Census, Decennial Census; U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Art Fair and Festival Attendance

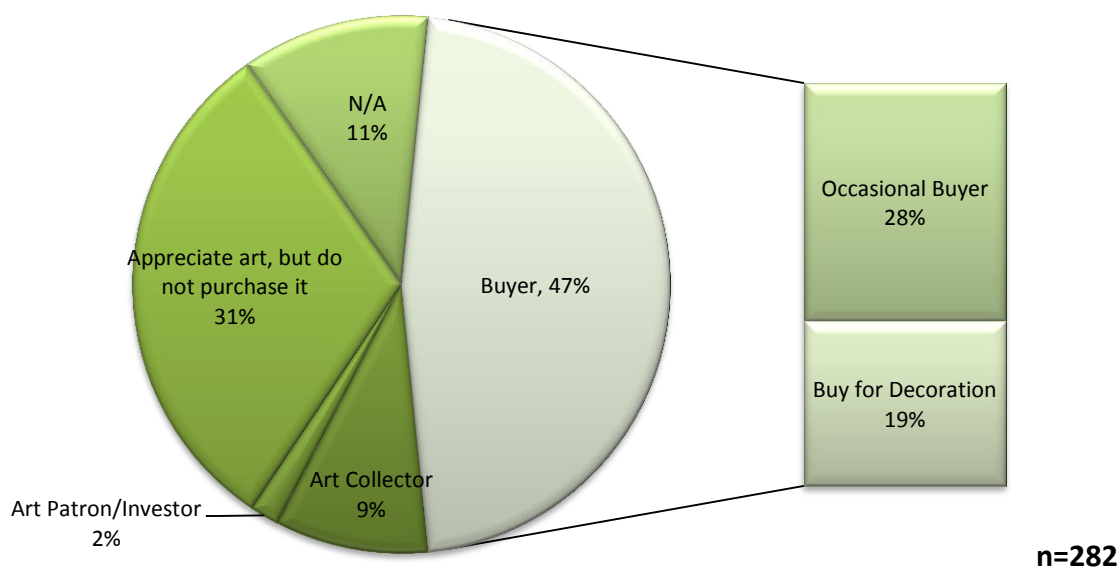
When both sample populations (visitors and artists) of the Survey of Art Fairs and Festivals were asked whether they attended the event at which they were surveyed before, a majority of both sample populations stated they had participated in the past (63% of visitors and 66% of artists). Moreover, half of visitors acknowledged they had attended the art fair six or more times in the past, noting consistent and repeated demand for local arts-related events. When visitors were asked why they attended the art fair instead of another event, 29% of respondents stated they attended because of the art, while 23% attended because it was close to home (Figure 33). Moreover, of those who came because of the art, almost half stated they came because of the art in general, not because of any one particular artist or medium.

Figure 33. Reasons Visitors Attended Art Fairs



Visitors were asked to classify themselves based upon self-identification of their purchase and consumption of art based upon the categories: *art collector*; *art patron/investor*; *occasional buyer*; *someone who appreciates art, but doesn't buy it*; and *someone who buys art to decorate home* (Figure 34).

Figure 34. Visitors Self Classification of Art Purchases



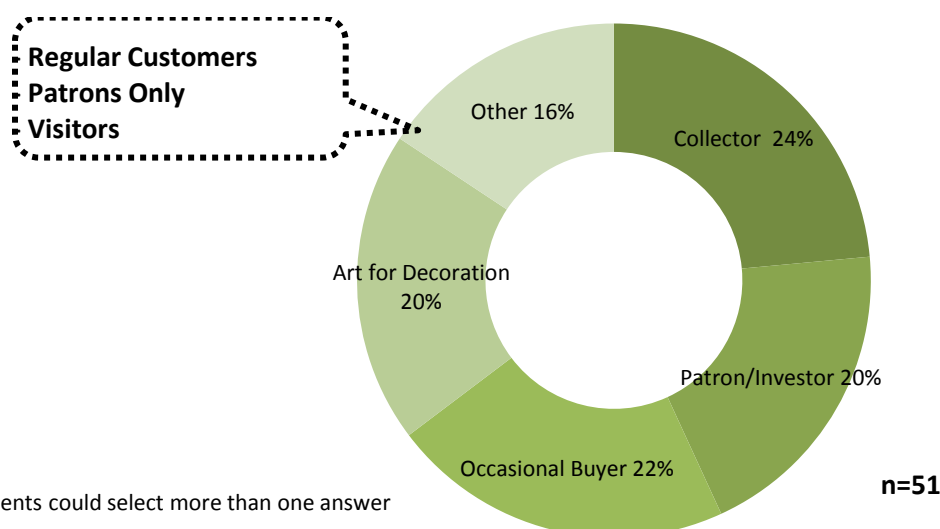
Galleries, Shops, and Studios Attendance

In regard to demand for local art, respondents were split exactly 50/50 on whether gallery and shop owners have seen an increase in demand for local art in their establishment. Following this pattern, the research team asked if respondents have seen an increased demand for Cleveland art in other cities, and again, respondents were split in half. Those who saw an increase in demand reported it in the mediums of *Textile/Fiber*, *Other*, and *Paint*.

In order to determine the market demand for Cleveland artists and their art, the research team asked respondents about the demographic of customers who purchased from their location. The questions targeted sex, race, relationship status, age, and type of interest in art. When asked if men, women, or both shop at their business more, 50% of respondents stated that *Both Men and Women Equally* shop at their business; 40% *Men* and 10% *Women*. This follows their responses that *Both Couples and Singles* frequent their location equally; 19% *Couples*, and 14% *Singles*. Ninety-five percent (95%) of respondents indicated that their customers are *White*, and 71% are from within Cuyahoga County.

Owners were asked to describe their customers as a type of art enthusiast based upon five major categories: *Collector*, *Patron/Investor*, *Occasional Buyer*, *Art for Decoration* and *Other*. Figure 35 displays the categories and responses. Overall, responses were split almost equally one fifth to each category, with slightly more feedback for the *Collector* identity (24%).

Figure 35. Description of Customer Base



CONCLUSION

Personal interviews and focus groups were conducted in order to understand local artists' views of the supply and demand of the Cleveland VACD sector. The research found that there was a large network of art buyers in Northeast Ohio, but these consumers may not buy local art. Many interviewees noted arts and culture consumers are not fully educated about Cleveland's arts scene, but admit artists have not been very active in carrying out such educational outreach. Insights of supply and demand from interviews conducted by the research team and focus groups align with quantitative data from surveys and federal data collected illustrating large untapped potential for local visual arts.

In regard to supply and demand by the numbers, thirty-three percent (33%) of respondents from the Survey of Art Fairs and Festivals said they experienced competition from inside Cuyahoga County, and 30% of respondents indicated they believed competition existed from outside of Cuyahoga County. These responses support the perception espoused during the interviews and focus groups that a large supply of artists exists in the greater Cleveland area. This large supply is accompanied with a limited demand for local arts and comparable scarce opportunities for local artists within the region. One way to estimate the demand for art and artists is to evaluate the ratio of number of people per VACD establishment in a given geographic area. The Cleveland MSA has the second smallest ratio of MSAs (2,241 residents to 1 establishment) as compared to the Cincinnati MSA, Columbus MSA, Pittsburgh MSA, and Indianapolis MSA. This small ratio indicates there are less people for every art establishment in the Cleveland MSA compared to other regions. Less people may be creating less total demand, especially if they are not well-educated about the availability of local art supplies and the sector's high quality. On the other hand, this small ratio may reflect that the greater Cleveland area has a larger total number of establishments than most of the comparable MSAs available to service the art demand of local residents. Because of this, the Cleveland MSA may have larger individual demand for art and art-related activities than the other four MSAs or demand for a wider, more diverse range of artistic establishments.

CHAPTER 6

ART GALLERIES: IMPORT AND EXPORT OF VACD

INTRODUCTION

The analysis of import and export for the Cleveland Visual Arts, Craft and Design (VACD) sector aims to display its perception and position of Cuyahoga County to the Northeast Ohio region, state of Ohio, and the nation. In order to examine the import and export capacity of this sector the research team engaged the “art ambassadors” of our city – shop and gallery owners, as well as other professionals in the sector. The shop and gallery owners were involved in a survey to further delineate the typology of their involvement in the visual arts scene, importation of artwork, exportation of artwork, overall acquisition of artwork, and business operations.

METHODOLOGY

The Survey of Galleries, Shops, and Studios was a phone-based survey to solicit open-ended responses in regard to their operations conducted by the Center for Economic Development (the Center). Data was gathered and analyzed to understand of the role of galleries and shops involved in the VACD sector and learn about the local import and export functions surrounding the visual arts that they provide. In order to contact these establishments, the Center collected information on almost 100 galleries, shops, and studios. To call all of these establishments, the master list of organizations was compiled across three categories: 1) shops, 2) auction houses, and 3) galleries. Respondent calls were made over a two-week period in August 2013, totaling 21 responses (over 20% response rate). In general, the 21 respondents to the Survey of Galleries, Shops, and Studios, 16 were galleries and 5 were shops.

Moreover, the research team attended art fairs and festivals throughout Cuyahoga County. At these events, artists and individuals in attendance were surveyed in order to gauge supply and demand. Researchers surveyed participants in face-to-face intercepts in order to further delineate the typology of the visual arts sector, quantify aspects of visual artists’ earnings and purchasing, as well as qualify further facets of the life of a visual artist in Northeast Ohio. The research team attended eight events throughout the summer of 2013.

Additional information for the analysis of the imports and exports to the VACD sector was collected through interviews, focus groups, and research conducted by the Center throughout 2013. This analysis includes input from these varied sources to produce a more complete picture of the imports and exports of VACD.

IMPORTING ART

Institutional Art

There are many ways art and artists are imported into a region. Major institutions hold vast collections of art from across the world. Progressive Insurance, headquartered in Mayfield Heights, has a collection of more than 7,500 pieces including works from across the globe which makes it one of the largest corporate collections of its kind in the world. The company also has a free Progressive Art App and a book called “ArtWorks: The Progressive Collection” detailing pieces of their collection.¹³⁸ The Cleveland Clinic Art Program has a mission to “enrich, inspire and enliven patients, visitors, employees and community, and to embody the core values of the institution.” Their collection includes over 4,500 pieces of local, national, and international artwork.¹³⁹ University Hospitals started developing its art collection in 1988. Their collection consists of work in various mediums including paintings, photographs, drawings, prints, textiles, glass, sculpture, and ceramics. The artists are local as well as from across the United States, Canada, and Europe. They have pieces from emerging and internationally recognized artists.¹⁴⁰ The crown jewel of the art world in Cleveland is without a doubt the Cleveland Museum of Art. The museum opened in 1916 and in its almost 100 year history it has amassed a collection of almost 45,000 pieces covering 6,000 years of artwork.¹⁴¹

But how do these institutions collect and import their art? Yes, many institutions have their own curators but galleries also play a major role in helping them identify works of art to purchase. Moreover, more than half of the shops/galleries surveyed by the Survey of Galleries, Shops, and Studios sell to businesses. Several respondents indicated when businesses purchases happen, they are from a corporate entity, and can happen as quite a sizable sale. Types of business that may engage in these sales are large corporations, hospitals, law-firms, and universities to name a few. In order to understand this mechanism better, the research team inquired how a gallery or shop would establish a contract with a business or a corporation. Responses varied, but by far, the most common answer was referrals. Many respondents indicated their reputation and personal relationships, that business seeks them out, and events/trade shows. The pervasive support individuals within the visual arts scene provide each other through the interconnectedness of its artists, galleries, shops, and as we now see, businesses investing and supporting the sector, is a common theme throughout the study.

LOCAL ART LOVERS

From interviews and focus groups, many artists stated individuals who purchase art, from a collector to an average tourist, import art to Cleveland as memories of their travels. Moreover, artists described a tendency for consumers to want the art to not only represent their travels, but also their tastes (i.e. ordering a particular color, shape, or style). In addition, many artists said art patrons in Cleveland look to purchase art from larger art markets (i.e. New York or Chicago) because it is an established market, no matter if the art is more costly than in Cleveland.

¹³⁸ To see more on The Progressive Collection, go to <http://www.progressive.com/AtProgressive/The-Progressive-art-collection.aspx>

¹³⁹ For more information about the Cleveland Clinic’s Art Program, go to http://my.clevelandclinic.org/arts_medicine/art-program/about-art-program.aspx

¹⁴⁰ See <http://www.uhhospitals.org/services/art-collection/art-program/u-h-art-collection> for more details.

¹⁴¹ The Cleveland Museum of Art, <http://www.clevelandart.org/about/press/general-museum-information>

In order to understand the mindset of a consumer, the research team conducted a survey in a face-to-face intercept style with attendees at local art fairs and festivals. Thirty-one percent answered they appreciate art, but do not purchase it; while 28% are occasional buyers, 19% buy art for decoration, 9% are collectors, and 2% are patrons/investors.

SUPPORTING LOCAL ART

There are many agencies and foundations that support arts and culture and bring money into Cuyahoga County. While not all of these sources are available, the National Endowment for the Arts (NEA) makes their grant history accessible. In 2013 alone, the NEA awarded \$150,000 to Cuyahoga County VACD programs. These included \$90,000 to the Cleveland Museum of Art for the reinstallation of the Chinese, Indian, and Southeast Asian galleries; \$20,000 to SPACES, a nonprofit gallery, for support of the World Artists Program, a residency opportunity for national and international artists to create new work; \$20,000 to the Sculpture Center to support the development and implementation of the Window to Sculpture Emerging Artist series; and \$20,000 to Zygote Press for a series of artists residencies and exhibitions. In 2012, the NEA awarded a total of \$145 million, \$1.9 million of which was in Ohio (1.3%), and \$255,000 of which was in Cuyahoga County (.2%).¹⁴² The Ohio Arts Council is a state-wide agency that funds, supports, and provide leadership for the arts. Their vision and mission is dedicated to strengthening Ohio communities via arts experiences.¹⁴³ In FY 2013, the Council funded 123 grants in Cuyahoga County totaling more than \$2.5 million, of which over \$1 million was awarded to recipients engaged in VACD programs. When those grants for programs categorized as “multidisciplinary” are removed, a more conservative estimate of VACD grants is obtained, with total VACD grants of \$0.7 million, or 28% of total grant making.

Aside from the national and state levels, support to local artists is also coming from Cuyahoga Arts and Culture (CAC). As a political subdivision of the State of Ohio, CAC administers public funds accumulated via the cigarette tax and distributes it to organizations supporting arts and culture in Cuyahoga County.¹⁴⁴ Since 2007, CAC has invested more than \$112 million dollars in 237 arts and cultural organizations throughout the County. For 2014 alone, CAC announced that it will invest \$13.7 million in grants to 57 arts and culture organizations. The Cleveland Museum of Art, the beneficiary of the largest 2014 grant in the visual arts community, is accompanied by the Cleveland Institute of Art, LAND Studio, Museum of Contemporary Art Cleveland, SPACES, The Sculpture Center, Zygote Press, and Community Partnership for Arts and Culture.

Other local efforts are supporting the arts and culture sector as well. For example, CPAC’s mission is to strengthen, unify and connect greater Cleveland’s arts and culture sector through a range of programs and services. CPAC has a nationally-known Creative Workforce Fellowship program which annually offers twenty, \$20,000 fellowships to advance individual artists’ work and professional development. The nonprofit operates the Artist as an Entrepreneur Institute (AEI) which is a workshop driven model to help artists strengthen their business operations. CPAC regularly convenes the arts and culture sector around issues of common cause through its Arts and Culture Roundtables. Through its Artist in Residence pilot program CPAC, in conjunction with neighborhood partner Northeast Shores

¹⁴² To see more information of different grants, you can search the National Endowment for the Arts’ database at <http://apps.nea.gov/GrantSearch/SearchResults.aspx>

¹⁴³ To read more about the Ohio Art Council, go to <http://www.oac.state.oh.us/aboutOAC/>

¹⁴⁴ To read more about Cuyahoga Arts and Culture, go to <http://www.cacgrants.org/mission-and-history.php>

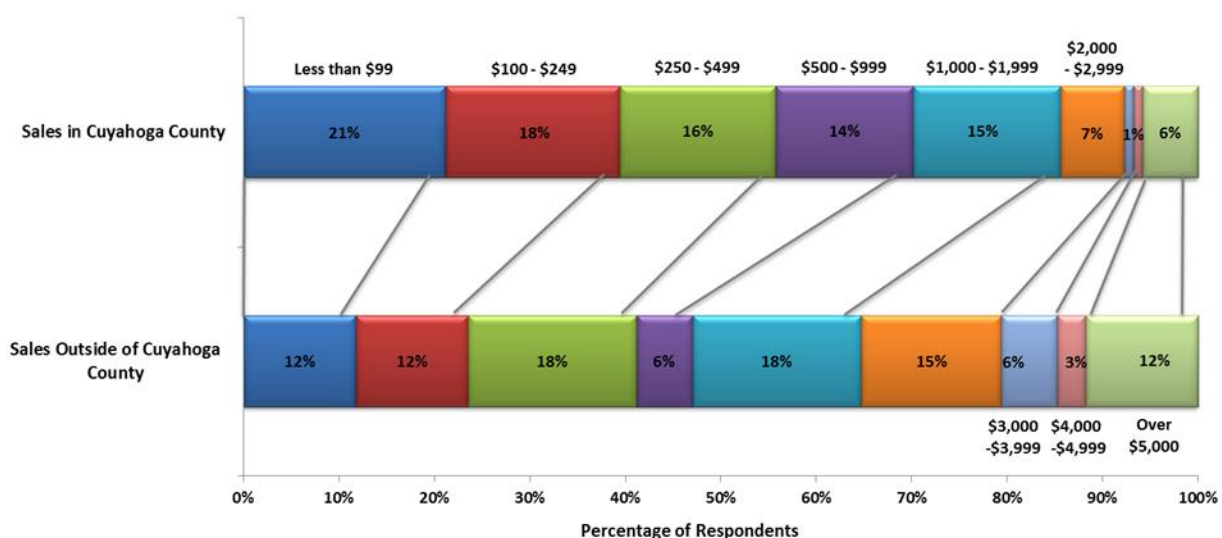
Development Corporation, increased artists' access to affordable space and demonstrated the role artists play in promoting revitalization in the North Collinwood neighborhood.

Cuyahoga County organizations also received funding from ArtPlace, a private sector offshoot of the NEA, which awarded \$875,000 to Cuyahoga County organizations: UpCycle St. Clair received \$375,000 for an arts-based strategy that will show how creative reuse can lift an entire neighborhood and Northeast Shores received \$500,000 for its Collinwood Rising program, which dovetailed with the Artist in Residence initiative there.¹⁴⁵

SUPPORTING LOCAL ARTISTS

Answers to the Survey of Artists showed the majority of the money local artists earn from outside of Cuyahoga County are on higher-end pieces of artwork. Twenty-one percent of the sales in the county were less than \$99, while only 12% of the sales outside the county were in that range (Figure 36). On the opposite side of the spectrum, 6% of the sales in the county were over \$5,000 each, while 12% of their sales outside the county were over that rate.

Figure 36. Amount of Money Earned Per Art Display, All Respondents



EXPORTING ART

Cleveland Art Beyond Cleveland

Cleveland artists sell their products all over the world. Thirty-eight percent of artists who responded to the Survey of Artists said they sell their work within Cuyahoga County; 13% sold work in Northeast Ohio, 8% in Ohio, 16% in the U.S., and 7% internationally. Also, from the Survey of Visitors at Art Fairs and

¹⁴⁵ To see other grants awarded by ArtPlace, go to <http://www.artplaceamerica.org/grants/>

Festivals, 30% of the respondents attended these events from outside Cuyahoga County; exporting local art to their hometown.

Galleries, shops, and studios also sell their art both inside and outside the region. While 68% of the respondents said their customers were from within the county, 11% reported customers outside of Cuyahoga County and 18% reported customers outside of Ohio.

Companies like Cleveland Art are also in the business of exporting. Founded in 1994, this company repurposes and recycles industrial machinery and other surplus materials, and sits at the forefront of what they call “vintage and recycled industrial design.” The company now has showrooms in Cleveland, New York, and Los Angeles as they continue to grow their business which focuses on selling tables, display units, carts, storage solutions, seating, lighting, consoles, credenzas, and decorative art pieces.¹⁴⁶

One unexpected export from Cleveland and other Midwest cities is a new concept known as “Rust Belt Chic.”¹⁴⁷ This concept aims to capture some of the “cool” associated with being in a post-industrial city. As the book *Rust Belt Chic* notes,

“Rust Belt Chic is churches and work plants hugging the same block. It is ethnic as hell. It is Cleveland punk. It is getting vintage t-shirts and vinyl for a buck that are being sold to Brooklynites for the cost of a Manhattan meal. It is babushka and snakeskin boots. It is wear: old wood and steel and vacancy. It is contradiction, conflict, and standing resiliency. But most centrally, Rust Belt Chic is about home, or that perpetual inner fire longing to comfortable in one's own skin and community. This longing is less about regressing to the past than it is finding a future through history.”¹⁴⁸

The book tells a love story about Cleveland and what it means to be from and live in this city – what makes it unique. This was echoed when Jason Schupbach, director of design programs for the NEA, visited Cleveland to see the city’s work on “creative place-making” – a broader concept that links art and investment to improving blighted neighborhoods. Not only was Schupbach impressed with neighborhoods like Detroit Shoreway, Collinwood, and St. Clair-Superior, but he is quoted as saying, “What we’ve been talking about since my first day on the job two years ago is how artists can change places....We’re talking about it; you’re doing it.” He goes on to say, “There’s really interesting stuff going on here. There’s an enormous amount of fun and creative things happening. Artists are moving here and building careers here in really interesting ways.”¹⁴⁹

View from the Galleries & Shops

Overall, shops and galleries understand what it takes to survive. Sixty-three percent (63%) of respondents saw an increase in sales over the last three years, but for many of them this did not come

¹⁴⁶ To read more about Cleveland Art, go to http://clevelandart.com/about_us/

¹⁴⁷ Jim Russell “Genealogy of Rust Belt Chic.” April 24, 2013. <http://www.newgeography.com/content/003659-genealogy-of-rust-belt-chic>

¹⁴⁸ Piiparinen, R. & Trubek, A. (Eds.). (2012). *Rust Belt Chic: The Cleveland Anthology*. Cleveland, OH: Rust Belt Chic Press.

¹⁴⁹ Cited in Steven Litt “Creative placemaking in Cleveland is hailed by the design chief of the National Endowment for the Arts.” *Plain Dealer*, July 27, 2013. http://www.cleveland.com/arts/index.ssf/2013/07/clevelands_fusion_of_the_arts.html

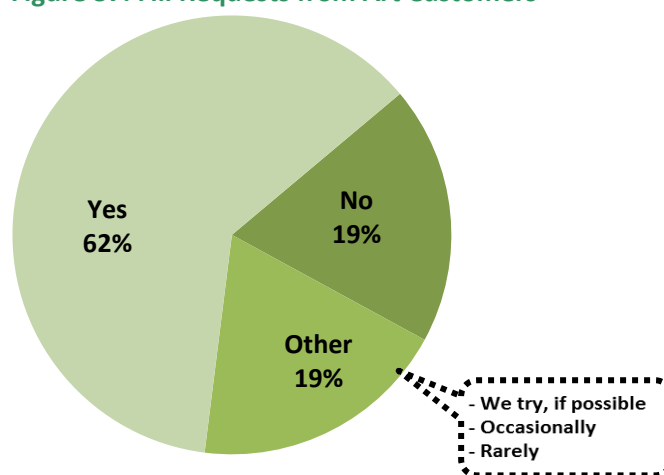
easy. Some pointed to the fact they were hit hard during the recession, and the last two years of growth in sales have recovered those losses. The other 40% that either declined in sales or stayed the same indicated it has been a challenging environment to be a gallery or shop. Looking to build business beyond face-to-face interaction, 62% of galleries/shops use the internet as a marketplace. It illustrates the role the Internet has played in the art industry and how its importance is increasing.

Beyond art, more than half of respondents indicated they venture into sales that are not art related, or are art peripheral (i.e. framing, posters, etc.); this allows them to diversify their product line. It is through importing, diversifying, and innovating product lines that galleries and shops can continue to stay in business.

Contracts are a major component to importing art into the Cleveland area. A majority of respondents (71%) are using various arrangements to display works of art in their gallery or shop rather than purchasing artwork outright. A small percentage of shops/galleries buy artists' work for their exhibitions. Very rarely the contracts for artists are exclusive to a single gallery or shop.

Galleries and shops also need to differentiate themselves from each other in a competitive market. In order to accomplish this, organizations examine their niche market and either engage in product or process differentiation to qualify themselves. Respondents indicated they segmented their services to a niche market within the visual arts, offered a unique product, and/or provided a higher quality of product (product differentiation). Others identified processes or services that distinguish them from other galleries/stores such as service and/or business model. Moreover, respondents were asked if they fulfill specific requests from art customers; 62% said *Yes*, and of those that responded *Other* (19%), some indicated they try if possible (Figure 37).

Figure 37. Fill Requests from Art Customers



An important feature of the contract is that gallery/shop owners display works on consignment basis. But these were not the only types of agreements that gallery/shop owners enter into with artists; responses also include making their own works, verbal agreement with artists, and receiving display commission. Except for this small number of responses, consignment is recognized as the traditional way to display artwork. With a typical consignment, artists sign contracts with retailers including galleries. Afterward artists provide shops/galleries with their work and products; they receive the

proceeds of the sale minus a commission. The commission depends on the contract, but it is usually 40 to 60 percent of the sale price.

THE ROLE OF GALLERIES, SHOPS, & STUDIOS

Galleries, Shops, and the VACD Sector

The Survey of Galleries, Shops, and Studios elicited responses from 16 galleries and five shops to better understand their role in the VACD sector in Cuyahoga County. In general, when asked to describe the VACD in three words, most respondents replied with positive characteristics. Figure 2 displays a word cloud with the most common words and phrases given by respondents when asked “How do you classify the Cleveland arts scene in three words.” Words such as *Vibrant* (4), *Exciting* (3), *Growing* (2), and *Talented* (2), were the most common words showing the positive atmosphere around the VACD sector. All other words mentioned by respondents had a frequency of one. Although the most prominent words in Figure 38 characterize a growing sector that can be exported to other locations, some did consider the sector to be *Disappointing* and *Disconnected*.

Figure 38. Respondent Words to Classify the Arts Scene



Source: Center for Economic Development, Cleveland State University; [www. Wordle.com](http://www.Wordle.com)

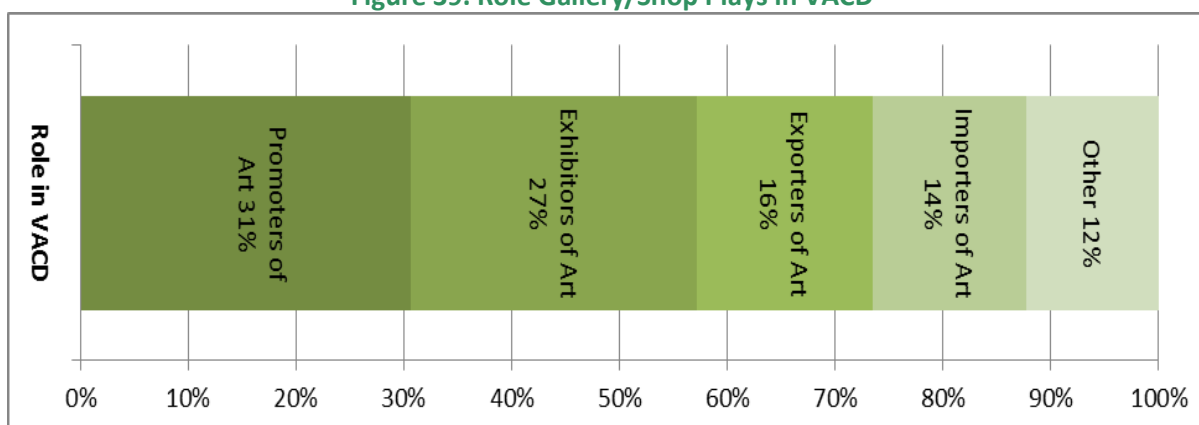
Supporting Artists

When asked if the shops or galleries act as a broker with entities in other cities, only 14% of respondents answered in the affirmative. Though an art broker can give artists more exposure by arranging for display of their works, it seems the respondents focus on their shops’ work of selling instead of acting as a brokerage firm which exports local art.

When asked to respond to the provocative statement, “A gallery or shop’s job is to sell art, not be a platform for the artist.” Forty percent (40%) of respondents disagreed with the statement, showing that

“Art sells when it is about the artist.” Interestingly enough, 30% said that it could be both, a platform for the artist and a way to sell art; noting there is a need to balance the promotion of the artist with the need to sell the works of art. These answers interplay with how galleries and shops see their role in the Cleveland VACD sector (Figure 39). Almost a third (31%) of respondents considered they act as *Promoters of Art*, while a smaller group sees themselves as *Exhibitors of Art* (27%). It is interesting to see only a quarter of respondents indicated an economic role in the sector for themselves (*Exporter of Art* (16%) or an *Importer of Art* (14%)).

Figure 39. Role Gallery/Shop Plays in VACD



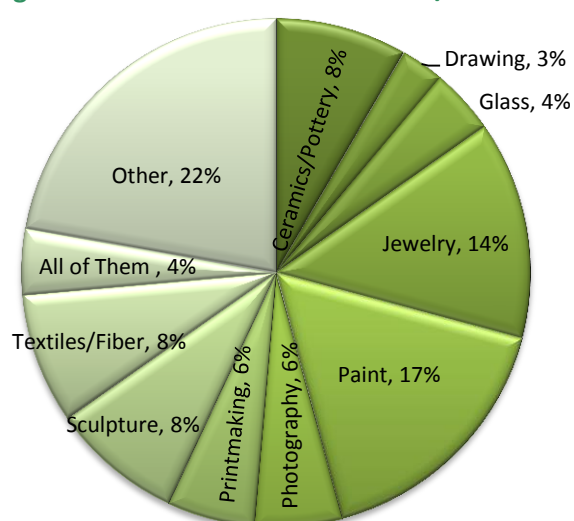
Local Quality

Understanding the perceived role of shops and galleries, and how they see the VACD sector in Cleveland, the research team wanted to see how the local art scene has changed over the short-term and therefore the amount it has exported from the Cleveland region.

When asked if the quality of local art increased over the last three years, 70% of respondents said *Yes*; and when followed-up with a question that asked in what mediums they saw the increase of art quality, the top responses were in: *All of them*, *Other*, and tied for third, *Textile/Fiber* and *Jewelry*.

The mediums displayed and sold in galleries and stores were also varied. The most popular mediums were paint (17%), jewelry (14%), sculpture (8%), and textiles/fiber (8%) (Figure 40).

Figure 40. Mediums Sold in Galleries/Stores

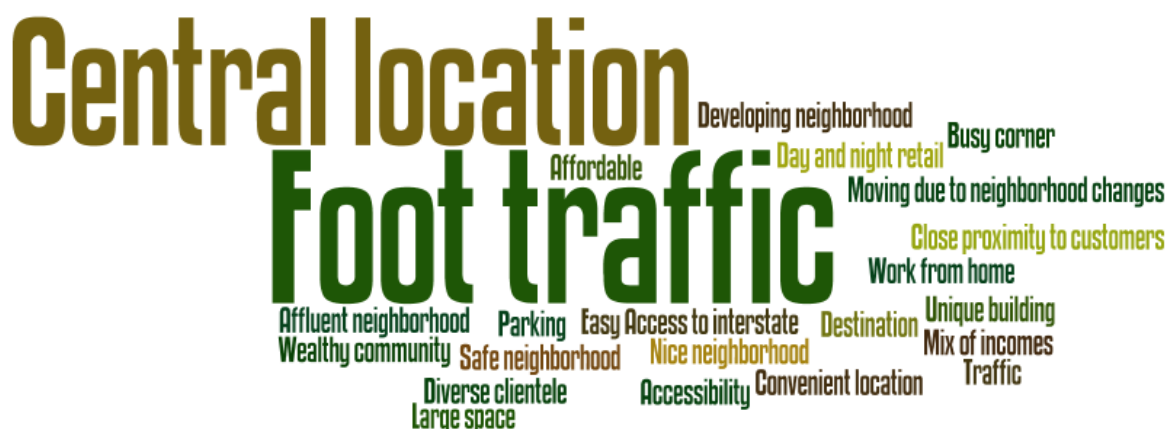


Note: Respondents could select more than one answer

Location

Most gallery and shop owners recognized significant benefits to their current locations. They noted how their locations help generate sales, expose individuals to their goods, and open them to new markets (Figure 41). Understanding that location and perceptions are key to the mindset of consumers, owners were asked if the image of Cleveland helps them sell art. Respondents' opinions were split down the middle on the effect of the image on sales (53% yes, 47% no). They noted how Cleveland has a rich history and high quality of art, but many people do not know Cleveland is synonymous with art.

Figure 41. Word Describing Benefits of Current Location



Source: Center for Economic Development, Cleveland State University; [www. Wordle.com](http://www.Wordle.com)

CONCLUSION

Through surveying galleries and visitors of art fairs the research team was able to find out the motivation of buyers on how they import and export art of the VACD sector. The importation of art happens through several mechanisms: business purchasing, collectors purchasing from local galleries or using them as brokers, buying arts while vacationing, and buying art at fair and shows outside of Cuyahoga County. It is through the last mechanism that art buyers can directly support local artists and those within the VACD sector. The answers to the Survey of Artists show the majority of the money local artists earn is from outside of Cuyahoga County and specifically on higher-end pieces of artwork. Moreover, Cleveland artists sell their products everywhere – outside of Cuyahoga County, outside of the state and abroad. With Rust Belt Chic hipper than ever, many are looking to take advantage of the authenticity Cleveland brings. When asked “How do you classify the Cleveland arts scene in three words?” Words such as Vibrant (4), Exciting (3), Growing (2), and Talented (2), were the most common words showing the positive atmosphere around the VACD sector. Many experts, galleries and shop owners know Cleveland has a rich history and great quality of art, but admit many people do not realize Cleveland is synonymous with art.

CHAPTER 7

THE ECONOMIC IMPACT OF THE CLEVELAND VACD SECTOR

INTRODUCTION

This analysis uses IMPLAN Professional and IMPLAN Data Files. IMPLAN Professional 3.0 is an economic impact assessment software system. The IMPLAN Data Files allow for the creation of sophisticated models of local economies based on relationships between industries to estimate a wide range of economic impacts.

The Cleveland Visual Arts, Craft and Design (VACD) Sector is linked to other industries through buy-sell relationships which contribute to the overall impact of the sector. To provide goods and services, companies in this sector buy intermediary goods and services from other companies both in- and outside the VACD sector.

The total economic impact estimate assumes the Cleveland VACD sector came into existence at the beginning of 2012 and instantly generated a demand for goods and services needed for its operation. We can equally also conceptualize the economic impact results in terms of what the Cuyahoga County economy would lose if the VACD sector disappeared. Five measures of impact estimated by the model are analyzed here: employment, labor income, value added, output, and taxes.

- *Employment* measures the number of jobs that are present because of the Cleveland VACD sector.
- *Labor income* is payroll paid to employees plus proprietors' income.
- *Value added* measures the value of goods and services produced by the sector, minus the intermediary goods.
- *Output* measures the total value of goods and services produced as a result of the activities of the Cleveland VACD sector.
- *Taxes* include federal, state, and local tax revenues.

Each of the impacts, except taxes, is a summation of direct impact, indirect impact, and induced impact.

- *Direct impact* is the initial value of goods and services the Cleveland VACD sector purchases.
- *Indirect impact* measures the jobs and production needed to manufacture goods and services required by the Cleveland VACD sector.
- *Induced impact* is the increase in spending of local households due to the income received through their work in the Cleveland VACD sector and its suppliers.

METHODOLOGY

To estimate the economic impact of the Cleveland VACD sector, a data set of artists, designers, and other VACD-related establishments in Cuyahoga County were created by gathering data from three sources: the Quarterly Census of Employment and Wages (QCEW, also known as ES202), a web-based survey of Cleveland artists, and spending by visitors at eight art and craft fairs. The data entered into the model represent our best attempt to gather all of the employment, wages, and sales of the Cleveland VACD sector.

The ES202 data is managed, maintained, and edited by the Center for Economic Development at Cleveland State University's Levin College of Urban Affairs (the Center). The Center receives quarterly updates of this data from the Ohio Department of Jobs and Family Services. The ES202 includes information such as company name, address, city, county, industry classification code (NAICS), employment, and wages on most establishments with paid employees (by site location) in Ohio. Although the database includes company level information, only industry level data can be reported because of confidentiality restrictions. The ES202 database reports only data for businesses that have paid employees and pay unemployment insurance. Establishments with one employee do not report to ES202. The 2012 ES202 data was pulled for each establishment located in Cuyahoga County that was assigned an NAICS code and included as part of the Cleveland VACD sector definition.¹⁵⁰

The data estimates for local artists came from a survey conducted by the Center that targeted Cuyahoga County artists. Some artists might not be captured by the ES202 data due to the individualistic nature of the art business. The earnings for artists are also undercounted due to data gathering limitations, and, consequently, this study represents only a small fraction of the total number of Cuyahoga County artists. In addition, some artists may not have reported all of their income on the survey. All these undercounts make our estimates of economic impact conservative.

The Center staff attended eight art and craft events in Cuyahoga County during the summer of 2013. These events were: 78th St. Studios Art Walk, Arts by the Falls, Clifton Arts and Music Fest, Shaker Heights Arts and Music, Cain Park Arts Festival, Lakewood Arts Festival, Berea Arts Fest, and Ingenuity Fest. A random sample of guests was surveyed to ask about their spending patterns on both arts and crafts and local food. For the impact analysis, a ratio of guests from outside the county was calculated and applied to the total number of guests at the event, an estimated number from in the *2012 Ohio Arts Festivals & Competitions Directory*.¹⁵¹ Cuyahoga County residents were excluded based on what is known as the “substitution effect” – the assumption that if residents did not attend this event, they were nonetheless likely to spend their money elsewhere in the county and thereby provide no additional economic impact at the arts and crafts show. Then, an average of the total spending on art and total spending on food and beverages was made and included in the impact analysis.

OVERALL IMPACT

The overall economic impact of the VACD sector in 2013 includes a total of 9,707 direct employees, \$478 million in employee compensation, and an additional \$993,136 in sales at events. From this direct

¹⁵⁰ See the trend analysis methodology for more details in regards to the Cleveland VACD NAICS definition.

¹⁵¹ Source: Ohio Arts Festivals & Competitions, Ohio Arts Council.

<http://www.oac.state.oh.us/search/OACFestival/SearchFestivals.asp>

impact, the VACD sector accounted for 17,844 total jobs (Table 12). Fifty-four percent of these jobs made a direct effect; in other words, 9,707 people were directly employed by Cuyahoga County's VACD sector. Another 25% of all employment economic impact constituted the indirect effect. This 25% represents 4,460 jobs (existing and newly created) in the industries that house a supply-chain of the VACD sector, which are industries that sell their products and services to art industries identified in the VACD sector so they can produce art products. Lastly, 21% of the total employment impact reflects the induced effect. In other words, 3,677 jobs exist across many sectors and industries due to purchases people make from salaries earned either being directly employed in the VACD sector or being employed in the industries supplying to the VACD sector in Cuyahoga County.

Table 12: Economic Impact of the Cleveland VACD Sector (by Direct, Indirect, and Induced Impacts), 2013

Impact Type	Employment	Labor Income	Value Added	Output	Tax
Direct Effect	9,707	\$491,254,691	\$760,047,355	\$1,794,410,357	\$135,415,475
Indirect Effect	4,460	\$269,272,489	\$412,907,991	\$639,315,215	\$75,721,066
Induced Effect	3,677	\$174,389,430	\$297,455,644	\$469,642,477	\$62,750,114
Total Effect	17,844	\$934,916,610	\$1,470,410,990	\$2,903,368,049	\$273,886,655

The total labor income associated with the VACD sector was \$934,916,610. Of this total, \$491 million comprised the direct effect (52%), \$269 million derived from the indirect effect (29%), and \$174 million made up the induced effect (19%).

In terms of value-added impact, the VACD subsector had a \$1.5 billion effect. Over \$760 million is considered direct effect (52%), \$639 million came from the indirect effect (28%), and \$297 million was from induced effect (20%).

The total output impact of the VACD was \$2.9 billion in 2013. Sixty-two percent of this was in the direct effect (\$1.8 billion), 22% was from indirect effect (\$639 million), and 16% derived from induced effect (\$469 million).

The total tax impact of the VACD sector in 2013 was \$274 million. Forty-nine percent was the direct effect (\$135 million), 28% – the indirect effect (\$75 million), and 23% – the induced effect (\$62 million). Almost \$98 million was in state and local taxes and \$176 million was in federal taxes.

The true economic impact of VACD sector can be assessed by calculating how the rest of the economy will grow if we increase the final demand in the VACD sector by one unit. That is, for each employee that works in the VACD sector (increase in the final demand by one employee), an additional 0.84 jobs are created outside of the sector through the VACD's supply chain and increase of the purchasing power of employees of the VACD sector and/or the supply industries (induced and indirect effects) (Table 13 – Table 13 top line). In other words, for every 10 jobs that exist in the VACD sector, more than 8 other jobs exist in other sectors of the Cuyahoga County's economy. Also, for each employee added in the VACD sector, an additional \$96,428 in labor income is created, an additional \$151,725 is created in value added, an additional \$299,718 is created in output, and an additional \$28,264 is created in taxes.

Also, for the per unit change in final demand, for each dollar in labor income in the VACD sector, an additional \$0.90 is created; for each dollar in value added, and additional \$0.93 is created in value added; for each dollar in output, and additional \$0.62 is created in output; and for each dollar in taxes, an additional \$1.02 is created in tax impact (Table 13 second line).

Table 13: Impact per Unit Change in Final Demand and per Employee

	Employment	Labor Income	Value Added	Output	Tax
Per Employee	1.84	\$96,428	\$151,725	\$299,718	\$28,264
Per Unit Change in Final Demand	0.84	\$0.90	\$0.93	\$0.62	\$1.02

ECONOMIC IMPACT OF THE VACD SECTOR BY EMPLOYMENT, EVENTS, & AMATEUR ARTISTS

The VACD sector generates an impact on the local economy that can also be conceptualized through the economic impact from the artistic base, employment and income of people who work in industries related to the sector, and the spending by visitors that come from outside of Cuyahoga County and spend their income within the region. To assess the differences between the activities related to base employment in the sector and the visitor spending from the arts-related events, the data was again split into three groups: the base employment, wages, and sales in the VACD sector; the employment, wages, and sales related to events; and the group of amateur artists from the survey instrument (Table 14).

In terms of economic impact, the base employment in the VACD sector is significantly larger than the employment generated by amateur artists and events. This difference in impact occurs because employment generated by visitors represents only a fraction of base employment in the sector and mainly reveals the employment generated in other arts-related industries generated through spending patterns (such as employment in the hospitality and food industries).

The base employment represented 98% of the total employment impact (17,509) and 99% of the total labor income, value-added, output, and tax impacts (\$922 million, \$1.5 billion, \$2.9 billion, and \$271 million respectively), 88% of the output impact (\$736.6 million).

The amateur artists and the events each represented less than one percent of the total impact. The employment of 136 artists from the survey created 320 jobs, \$12 million in labor income, \$17 million in value added, \$30 million in output, and \$3 million in taxes. The \$993,136 that was estimated to be spent at arts-related events in Cuyahoga County generated the equivalent of 15 jobs, \$603,011 in labor income, \$839,476 in value added, \$1.4 million in output, and \$160,296 in taxes.

Table 14: Economic Impact of VACD by Employment, Events, & Amateur Artists

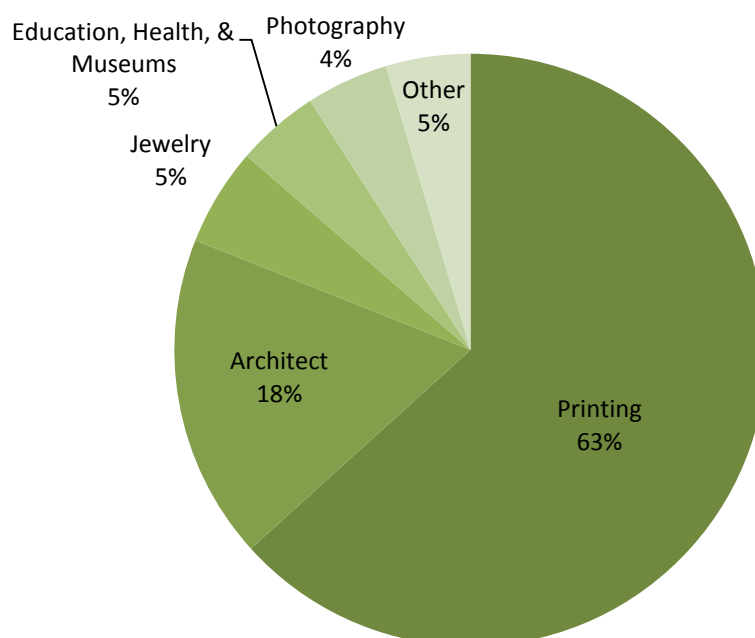
Impact Type	Employment	Labor Income	Value Added	Output	Tax
Employment	17,509	\$921,978,194	\$1,452,511,059	\$2,872,168,560	\$270,684,963
Amateurs	320	\$12,335,405	\$17,060,455	\$29,759,591	\$3,041,396
Events	15	\$603,011	\$839,476	\$1,439,898	\$160,296
Total Effect	17,844	\$934,916,610	\$1,470,410,990	\$2,903,368,049	\$273,886,655

ECONOMIC IMPACT OF VACD SUBSECTORS

Next, the economic impact of the VACD sector was examined according to subsector. Nine subsectors were included in the impact analysis using the data from the ES202 database: *Artists; Architects; Education, Health, & Museums; Glass; Jewelry; Metal, Stone, & Wood; Photography; Printing; and Textiles*. Additionally, *Amateur Artists* are included with data based on the artist survey. Finally, *Events* were included with data based on the survey at eight art events.

The largest VACD subsector in terms of all measures of impact (employment, labor income, value added, output, and taxes) was *Printing* (Figure 42), which has the largest employment within this subsector in Cuyahoga County (See Chapter 1, “Typology and Trend Analysis of the Cleveland VACD Sector”). *Architects; Jewelry; Education, Health, and Museums; and Photography* subsectors rounded out the top five in terms of employment. The *Glass; Metal, Stone, and Wood; Amateur Artists; and Events* subsectors all had an impact of less than 100 employees.

Figure 42: Employment Impact by VACD Subsector, 2012



Other includes: *Amateur Artists; Textiles; Glass; Metal, Stone, & Wood; Artists; and Events.*

In terms of labor income, *Printing* remains the largest subsector, followed by *Architect*; *Photography*; *Jewelry*; and *Education, Health, and Museums* (Table 15). In value-added impact, the second highest impact was in the *Architect* subsector followed by *Photography*; *Education, Health, and Museums*; and *Amateur Artists*. In output impact, the second highest impact was again in the *Architect* subsector followed by *Photography*; *Education, Health, and Museums*; and *Jewelry*. Finally, in terms of tax impact, *Printing* was again the highest, followed by *Architects*; *Jewelry*; *Photography*; and *Education, Health, and Museums*.

Table 15: Economic Impact of the Cleveland VACD Sector by Subsector, 2012

Subsector	Employment	Labor Income	Value Added	Output	Tax
Artists	40	\$1,017,240	\$1,557,151	\$3,629,570	\$272,982
Architects	3,165	\$176,736,452	\$248,555,309	\$412,788,499	\$45,943,500
Education, Health, & Museums	808	\$34,059,436	\$62,575,338	\$104,094,599	\$11,093,356
Glass	97	\$5,563,753	\$8,484,188	\$19,144,950	\$1,660,008
Jewelry	953	\$34,435,287	\$57,310,663	\$66,939,322	\$17,210,805
Metal, Stone, & Wood	85	\$4,846,948	\$6,176,487	\$13,690,445	\$1,200,925
Photography	801	\$38,662,126	\$69,409,590	\$170,089,666	\$12,895,627
Printing	11,294	\$621,242,204	\$990,514,721	\$2,073,083,373	\$177,812,398
Textiles	266	\$5,414,748	\$7,927,612	\$8,708,136	\$2,595,362
Amateur Artists	320	12,335,405	17,060,455	29,759,591	3,041,396
Events	15	603,011	839,476	1,439,898	160,296
Total	17,844	\$934,916,610	\$1,470,410,990	\$2,903,368,049	\$273,886,655

Other Affected Industries

Going deeper into the analysis reveals *Printing*, with its 3,047 jobs, as the industry most affected by the VACD sector impact in terms of direct employment. The largest indirect employment impact was *Employment services* (602 jobs). The largest sector in terms of induced impact was in *Food services and drinking places* (755 jobs).

The industry most affected by the VACD sector impact in terms of direct labor income impact was *Directory, mailing list, and other publishers*¹⁵² (\$155 million). The largest indirect labor income impact was *Management, scientific, and technical consulting services* (\$18 million). The largest sector in terms of induced impact was in *Private hospitals* (\$17 million).

In terms of value added impact, the industry most affected by the VACD sector impact was again *Directory, mailing list, and other publishers* (\$298 million). The largest indirect labor income impact was *Real estate establishments* (\$45 million) and the largest sector in terms of induced impact was in *Imputed rental activity for owner-occupied dwellings* (\$36 million).

¹⁵² NAICS 511140 - Directory and Mailing List Publishers: This industry comprises establishments primarily engaged in publishing directories, mailing lists, and collections or compilations of fact. The products are typically protected in their selection, arrangement and/or presentation. Examples are mailing address lists, telephone directories, directories of businesses, collections or compilations of proprietary drugs or legal case results, compilations of public records, etc. These establishments may publish directories and mailing lists in print or electronic form.

The above industries also represented the top three in terms of direct output. The industry most affected by the VACD sector impact in terms of direct output was, *Directory, mailing list, and other publishers* (\$709 million). The largest indirect labor income impact was *Real estate establishments* (\$58 million) and the largest sector in terms of induced impact was in *Imputed rental activity for owner-occupied dwellings* (\$55 million).

Printing Sector

The printing sector was the largest in terms of economic impact. The direct employment impact was 5,567 jobs, the indirect employment impact was 3,278 jobs, and the induced employment impact was 2,449 jobs – for a total of 11,294 jobs in this subsector alone (Table 16). This sector represents 63% of the total employment in the VACD subsector.

Additionally, the printing sector represents 66% of the VACD labor income (\$621 million), 67% of the value added impact (\$991 million), 71% of the output impact (\$2.1 billion), and 65% of the tax impact (\$178 million). This sector includes some larger export-based Cuyahoga County employers and is also the designation for many small- to medium-sized firms that serve the local population.

Table 16: Economic Impact of Printing Sector

Impact Type	Employment	Labor Income	Value Added	Output	Tax
Direct Effect	5,567	\$302,152,663	\$479,750,581	\$1,276,800,275	\$78,857,571
Indirect Effect	3,278	\$202,963,404	\$312,687,242	\$483,517,841	\$57,169,157
Induced Effect	2,449	\$116,126,137	\$198,076,898	\$312,765,257	\$41,785,670
Total Effect	11,294	\$621,242,204	\$990,514,721	\$2,073,083,373	\$177,812,398

Architecture Sector

The architecture sector was the second largest in terms of economic impact. This sector includes both population-serving and export-based Cuyahoga County businesses. The direct employment impact was 1,890 jobs, the indirect employment impact was 584 jobs, and the induced employment impact was 691 jobs (Table 17). This culminates in a total employment economic impact for this sector of 3,165 jobs. This sector represents 28% of the total employment in the VACD subsector.

Additionally, the printing sector represents 28% of the VACD labor income (\$177M), 25% of the value added impact (\$249M), 20% of the output impact (\$413M), and 26% of the tax impact (\$46M).

Table 17: Economic Impact of Architecture Sector

Impact Type	Employment	Labor Income	Value Added	Output	Tax
Direct Effect	1,890	\$111,887,800	\$145,926,036	\$253,318,908	\$25,714,565
Indirect Effect	584	\$32,097,003	\$46,765,284	\$71,261,402	\$8,444,117
Induced Effect	691	\$32,751,649	\$55,863,989	\$88,208,189	\$11,784,818
Total Effect	3,165	\$176,736,452	\$248,555,309	\$412,788,499	\$45,943,500

CONCLUSION

The VACD sector is a dynamic part of Cuyahoga County's economy. The sector accounted for 17,844 jobs, \$935 million in labor income impact, \$1.5 billion in value added impact, \$2.9 billion in output impact, and \$273 million in tax impact.

The limitations of this study resulted in conservative numbers, which underrepresent the actual impact of the sector. This only emphasizes the VACD sector's significance to Cuyahoga County. First, many artists are not registered businesses and therefore are not counted in the data from ES202. Also, many venues like restaurants and coffee houses that sell art were not captured in this analysis. Additionally, the survey of artists likely did not capture the entirety of those working part- or full-time in the arts. In terms of art-related events, the Center attended only eight shows throughout the 2013 season, which represents only a portion of the total art events in the county. Many events that are not specifically "arts events" feature art as a portion of the festivities, and this too is missing from the analysis.

Finally, it should be noted that although these measures show the economic impact of the Cleveland VACD sector, the benefits of the arts in enhancing the quality of life for Cleveland residents and visitors far outpace the financial return. While a number can be placed on the economic impact of the Cleveland Museum of Art, for example, the fact that this marvelous institution is situated in the heart of University Circle and remains free to the public carries immeasurable impact.

CHAPTER 8

CASE STUDIES

MOCA CLEVELAND: STURDY, DYNAMIC & STYLISH

MOCA Cleveland's new home is making an architectural statement at the intersection of Euclid Avenue and Mayfield Road. The museum is heralding the city's contemporary arts – and challenging us to think boldly about reimagining our future.

MOCA Cleveland's new home is a \$27 million exclamation point for broader redevelopment efforts taking place in the Uptown district of Cleveland's University Circle neighborhood. Today, the area is a hub for Cleveland's arts and culture, medical, and educational sectors, and the Museum of Contemporary Art (MOCA) Cleveland serves as a significant anchor cultural institution for the area.¹⁵³ Its presence is spurring economic investment, improving the urban landscape, and redefining perceptions of place that can attract and retain knowledge-based talent.

The already iconic building, which opened in October 2012, conveys a sense of dynamism, excitement and importance as well as audacity for broader efforts to re-envision our region. Jill Snyder, MOCA's executive director, says the building was designed to make a statement; indeed, its morphing geometric forms – pentagon, cube and prism –protrude into the Euclid Avenue and Mayfield Road intersection, creating a salient beacon for the urban district.

Building a Home for Contemporary Art

For most of its recent history, MOCA was largely hidden away in a rented space on the second floor of a retrofitted Sears department store that was part of the old Cleveland Play House complex. "People would never wander by and go in" at its former home, says David Abbott, executive director of the George Gund Foundation. As the former President of University Circle Inc., the neighborhood's community development corporation, he pushed for relocating the museum into a more high-profile setting over a decade ago.

Snyder echoes this sentiment when she recalls the initial site selection talks for the new building in the early 2000s. She says the goal was to move MOCA to a more visible location in University Circle, near the Cleveland Museum of Art, the Cleveland Institute of Art, and Case Western Reserve University (CWRU) to take advantage of the foot traffic those entities generated. In 2005, CWRU began exploring the area that has become known as Uptown. At the time though, the original master plan was dubbed the University Arts Retail District, giving credence to the idea that, in Snyder's words, "Culture was always a core piece of the economic plan."

MOCA hired Iranian-born architect Farshid Moussavi to design the new building in summer 2006, before CWRU had even engaged a developer for the district. "MOCA was at the table the whole time," Snyder

¹⁵³ For more information see Penn Institute for Urban Research study "Anchor Institutions and their Role in Metropolitan Change" <http://penniuur.upenn.edu/uploads/media/anchor-institutions-and-their-role-in-metropolitan-change.pdf>

says. The museum's decision to retain an architect so early in the discussions of the district allowed MOCA to have greater influence over the project. "We didn't know at the time that MOCA would take up the central corner," Snyder says about the planning process. "The timing worked out well. We were able to take the lead in how the master plan evolved before they selected the developer. We proposed the corner site."

Building Support

After securing MOCA's location, the next step in the master plan was to aggressively fundraise and leverage a mix of private, philanthropic, and public funds. The project received \$5 million in New Market Tax Credits, which were made available as part of the federal stimulus program, and \$450,000 in funding from the state. "Everything else was from foundations, corporations or private individuals," Snyder says.

Early foundation support came from the George Gund Foundation and the Cleveland Foundation. Snyder attributes MOCA's successful fundraising efforts to the museum's civic vision and its sustainable approach, both from a business and environmental perspective. The "green" building is heated and cooled by geothermal wells and is expected to earn a Silver rating from the U.S. Green Building Council for Leadership in Energy and Environmental Design (LEED).

Another compelling factor for funders was MOCA's "relatively modest scale," Snyder says. Compared to expansion projects that total in the hundreds of millions of dollars at the Cleveland Museum of Art, Cleveland

Institute of Art, University Hospitals, and CWRU, "we looked doable," Snyder says. "For the community, a \$35 million campaign was modest scale with high impact."

SPACES

SPACES is not a "traditional" art gallery. The Cleveland nonprofit serves artists as a resource and public forum to explore and experiment. SPACES works with artists to help them create new and cutting-edge work that pushes the boundaries of their medium. At the same time, SPACES acts as a platform and advocate for artists; for instance, the artists who display their work in the gallery maintain all rights to their art.

SPACES opened in 1978, sending out invitations to artists in the community to immediately engage in the programming process. The first event hosted by SPACES was attended by 35 people. Since then, over 9,000 artists have worked with the nonprofit as it transitioned from its first location in Playhouse Square to the Warehouse District, and then to its current location in Ohio City on the Superior Viaduct.

Today, the organization offers three programs for artists: The Swap, The Vault, and research and development. The research and development program helps artists, curators, and others explore ideas and objects through exhibition projects, which include solo and group endeavors. The Swap program is a residency program for international, national, and/or local artists to promote the exchange of ideas through discussion and the creation of new art, particularly through collaboration with local artists. The third program, The Vault, started in 2010, is an audio-visual experience inside a converted, walk-in safe allowing audience members to choose their own adventure in what they want to see. The art in the vault rotates every six months.

Website: <http://www.spacesgallery.org/>

Because of these efforts, MOCA had already raised the entire \$27.2 million building cost prior to breaking ground for the new structure. So far, all but \$4 million of its \$35 million campaign goal has been raised, including funds for building the facility and an endowment for the museum. MOCA's

fundraising success is particularly notable because it carried out its capital campaign during a time of economic recession. “We were the little engine that could,” Snyder says.

Anchoring a Neighborhood

Since the building’s completion, MOCA has quickly become an attractive anchor for neighborhood redevelopment. Examples of this include \$44 million in mixed-use development, totaling more than 144,000 square feet, in addition to \$30 million in public investment at two nearby transit stations that build upon the neighborhoods’ transit and pedestrian character. “It is part of a growing mixed-use neighborhood with lots of foot traffic,” notes Abbott. “There’s a much greater opportunity [for people] to walk in casually and participate. That’s only going to get better as University Circle grows. That location is a huge part of it.”

“We’ve been told by folks developing retail stores [and housing units] that those are leasing, in part, because of MOCA,” says Stewart Kohl, who serves on MOCA’s board of directors and co-chaired its capital campaign. “Their job of leasing space has been made significantly easier because of MOCA. People see that something is happening in the neighborhood. They envision themselves out on their balcony overlooking [the building and the nightlife around it]. It’s alive.”

Snyder says the building’s design also sends a message about MOCA’s commitment to helping redefine the surrounding neighborhood. “The architect did an unexpectedly bold thing,” she says. “The building literally juts into the intersection. So a section of the building is open in the back as public space.” This public space contradicts original plans for the building: “The open space had faced the road and wasn’t inviting for the public to use,” she says. “This design makes it friendlier to use. It really does create a welcoming space.”

Transformer Station

Opened in early 2013, the Transformer Station was the result of a partnership between the Bidwell Foundation and the Cleveland Museum of Art seeking to bring contemporary art to the west side of Cleveland through events and programming. The former rail electric substation, built in 1924 and one of sixteen built in Cleveland, was converted into an exhibition space and now acts as a new anchor in Cleveland’s Ohio City neighborhood.

The Transformer Station is the first endeavor of the Cleveland Museum of Art located outside of the University Circle neighborhood. Six months out of the year, the Museum will use the Station for contemporary art displays, with the remainder of the year being devoted to the Bidwell collection. The space serves as a lab or think tank; a place where the museum can uncover new opportunities and take more risks with their art. The space also displays the Fred and Laura Bidwell’s collection containing contemporary art pieces from the last twenty years by artists from across the globe. The focus of their collection has been on artists in the beginning and middle stages of their careers, with the intent of supporting new and emerging talent.

Website: <http://www.transformerstation.org/>

CWRU owns the plaza behind MOCA and views the open area as an extension of its campus. Restaurant, tavern and store patrons surrounding the plaza will now spill out into the public space behind MOCA. Snyder is pleased at the thought of retail, campus, and cultural life intersecting in a space dedicated to community exchange. MOCA encourages even more public interaction by allowing free access to its spacious first floor during open hours. Snyder envisions the space as an “urban living room,” an informal space that invites civic conversations among those who pass through its doors. “These kinds of buildings

are really important,” Snyder says. “Not for organizational self-congratulation, but for what they come to represent – they become icons,” she says. “They say something about the area.”

MOCA has especially focused on cultivating the museum’s connection with the students drawn each semester to the surrounding area. For example, students at CWRU and the Cleveland Institute of Art receive free memberships to the museum. Some students have been hired to help artists-in-residence and serve as security and retail workers. MOCA also commissioned industrial design students at the Cleveland Institute of Art to create lounge furniture for the community space.

During its annual fund raiser in October 2013, MOCA lowered the event’s admission fee to \$25 after 11 p.m. “so anyone can come,” Kohl says. “The crowd got younger with more piercings and tattoos. But it was also amazing how many of the original crowd [the funders] stayed. Not many places in the area do you see that. That’s really healthy.”

Adapting to Change

Despite its success, MOCA admits there may be some challenges ahead. Snyder expects MOCA to experience some growing pains which may require the museum to reframe its operations and programming.

“I think the jury is still out about our size,” she says. At 34,000 square feet, MOCA’s new building itself is significantly larger than its old, rented space, which totaled 20,000 square feet. MOCA’s operating budget is also larger, increasing from \$1.6 million to \$2.7 million, as well as its annual number of visitors, growing from 18,000 to 60,000. “This growth is risky for us,” Snyder says. “It will take us a few years to get there. Half of our visitors have never been here before. We have to be focused on understanding our visitors and audience.”

As a non-collecting institution, MOCA must also manage its new overhead costs while being mindful of its mission. “Now we have a building and are working toward an endowment,” Snyder says. “It’s not our mission to collect and preserve pieces. That’s a resource issue. If the pie is only so big, if you devote resources to a building and a collection, then you don’t have resources for our core mission of creating exhibitions, identifying trends and bringing them to this region, and doing that in a nimble way that’s forward-looking and that has that laboratory quality to it.”

Redefining a Region

While the museum continues to adapt to its new structure, Snyder is adamant about the regional implications of the institution as well. "What we did was very bold," Snyder says. MOCA's presence adds "heft and weight" to the ongoing effort to redefine the region that has become particularly important as more corporate, academic, and philanthropic voices talk about the kind of "culture shift" that is needed in how our region responds to change and takes on entrepreneurial risk. "We're making the case for why contemporary art matters," Snyder says. "Artists are visionaries. Contemporary art museums are hubs for creative people." The new building "is sort of a laboratory environment that celebrates innovation . . . Our job in the next few years is to use our role to communicate with the entrepreneurial sector."

The goal was always to create a space that captures attention and conveys a sense of dynamism, excitement, importance – and audacity. While David Abbott admits he doesn't expect that every greater Clevelander will love the building's design, he does expect everyone in the region will benefit from the progressive, creative statement it sends. "Even if you are a 65-year-old person living in the suburbs and will never think about going [to the museum], you have a stake in its success," Abbott says. A vibrant and visible contemporary arts community sends a message "about our openness, our willingness to approach things in new ways. That helps attract and retain the kinds of people who have a positive impact on our economy."

Region-wide economic impact may seem like a high expectation for moving a 45-year-old museum a few blocks down the

street, but Abbott believes its importance cannot be overstated: "Cleveland continues to struggle with and adapt to the notion that it is in competition with the world in a variety of ways. If we don't have the quality of place that people want, then they will move because they can. If Cleveland is going to win at attracting the kind of talent that gives rise to new enterprises and attracts businesses back to the region, it has to exhibit an authentic and engaging quality of place. Contemporary art is part of that attractive mix," Abbott says. One important area of competition for talent is for "young, creative, innovative people who can be anywhere," Abbott says. "That's a never-ending challenge. What is it Cleveland must do to attract and retain talent? One important statement is the arts." Not all art is created equal, of course, and Snyder notes that "cutting edge funky arts" like those featured at MOCA are one important key to appealing to that talent demographic.

Contemporary art not only tends to appeal to the adventurous, entrepreneurially young workers the region needs to attract, but it also challenges the region to rethink business as usual. "We can't just be

Cleveland Museum of Art

One of the world's most distinguished comprehensive art museums, the Cleveland Museum of Art was established in 1913 "for the benefit of all the people forever." Through Cleveland industrialists Hinman B. Hurlbut, John Huntington, and Horace Kelley setting aside money specifically to found an art museum, Cleveland's art museum was born. Lending his support, Jephtha H. Wade II, whose family had donated the land for the Museum of Art and Wade Park, served as a founding incorporator and the founding president of the board of trustees. These endowments originally created for the museum continue to fund it to this day and have helped it to remain free and open to the public.

Furthermore, through the leadership of William M. Milliken, museum director from 1930 to 1958, the institution prospered and started to gain its international reputation. That reputation owes itself, in part, to the generous funds from the Rogers Bequeath and the Severance Fund, which allowed the museum to purchase significant works that contribute to the museum's reputation as a world-class institution.

Website: <http://www.clevelandart.org/>

traditional. We can't be afraid of controversy," Abbott says. MOCA's glistening new home "helps us break some of our tradition-bound approaches to doing things. The nature of the world is such that we have to be willing to rethink anything and everything. Contemporary art helps us do that . . . having a separate institution, especially one that gets attention through its architecture and location is a powerful message. It says something about Cleveland that is important."

In this way, MOCA's building is an embodiment of what contemporary art is intended to do – provoke discussion, challenge convention, and call attention to our present. Sturdy, dynamic, and stylish, the MOCA building has firmly planted itself at the intersection of tradition and change, a shimmering metaphor for the region that stands as a permanent beacon for those wanting to experience contemporary art and those daring to change the global conversation about a region.

TREMONT: CREATIVE PLACEKEEPING

While other cities across the country are beginning to adopt “creative placemaking” as a means of revitalizing neighborhoods, many Cleveland neighborhoods have established reputations as havens for pioneering artists. Today, the Tremont neighborhood is taking steps to ensure it maintains its prominence as one of Cleveland’s established art enclaves.

Creative placemaking is the name of a recent trend for revitalizing neighborhoods, cities, and regions through the cultivation and promotion of their arts and cultural assets. While such efforts have occurred for many decades throughout the country, Ann Markusen and Anne Gadwa, in their 2010 report of the same name, coined the concept “creative placemaking”.¹⁵⁴ This report explains how arts and culture assets are key components of a broader economic development toolkit because of their unique ability to reimagine vacant spaces, celebrate ethnic and historic legacies, attract and welcome visitors, and rally community stakeholders around issues of common cause.

While more recent national initiatives like “Our Town”¹⁵⁵ and “ArtsPlace America”¹⁵⁶ are providing funding to support creative placemaking activities, Cleveland is home to many neighborhoods where artists, community partners, and arts and culture organizations have much longer histories of working together to impact economic and community development outcomes. An emerging issue for such communities is not “creative placemaking” per se, but rather “creative placekeeping.” Specifically, how do Cleveland neighborhoods that were early adopters of utilizing arts and culture-based redevelopment strategies maintain their momentum, remain competitive and respond to their community’s evolving tastes?

Cleveland’s Tremont neighborhood is a primary example. It was one of the first neighborhoods in Cleveland to witness a resurgence through the cultivation and growth of its arts and culture assets – a resurgence that was decades in the making.

Latent Potential

Visual artist, former gallery owner, and Tremont West Development Corporation staff member Jim Votava has one word to describe the neighborhood in 1993: “scary.”

Votava moved to Tremont as part of, what he describes as, a wave of artist settlers and squatters. When Votava arrived, the perception of many residents was that Tremont’s better days were behind it. The neighborhood that, decades earlier, had once attracted waves of Eastern European immigrants looking for good jobs in the nearby steel mills had lost its economic verve and more than two-thirds of its population, which went from a high of about 36,000 in 1920 to 8,138 in 2000.¹⁵⁷

¹⁵⁴ Ann Markusen and Anne Gadwa. A White Paper for The Mayors’ Institute on City Design “Creative Placemaking.” National Endowment for the Arts. 2010.
<http://arts.gov/sites/default/files/CreativePlacemaking-Paper.pdf>

¹⁵⁵ To read more about National Endowment for the Arts’ creative placemaking program, go to <http://arts.gov/national/our-town>

¹⁵⁶ To read more about ArtPlace America, go to <http://www.artplaceamerica.org/>

¹⁵⁷ To learn more about Tremont history, go to Neighborhood Link’s Neighborhood Tour: <http://www.nhlink.net/neighborhoodtournew/history.php?neighborhood=tremont>

Despite the neighborhood's challenges, Tremont's embrace of arts and culture, in addition to its cheap rent, encouraged Votava to leave his 5,000 square feet of studio space with its enviable lake views in downtown Cleveland noting that he "wanted to be part of a neighborhood that celebrated art and was affordable."

Other early artists like crafter Angelica Pozo were also drawn to Tremont for its affordability and the opportunity to be an artist-pioneer that would make arts and culture a driving force in the area's redevelopment.

Tremont's affordability and appreciation for the arts also attracted early gallery owner, Jean Brandt. Just two years out of college, she arrived in 1987 to open both her law office and Brandt Gallery, managing to successfully reinvigorate the boarded-up storefronts on Kenilworth Avenue. Eventually, Brandt's passion for the neighborhood and the arts would coalesce around the development of new programming that served to promote and expand the visibility of Tremont's art and culture assets.

Growing an Artistic Place

Six years after first arriving in Tremont, and encouraged by the continued growth in the art scene, Jean Brant and Sandy Rutkowski, then-bar manager at Edison's Pub, organized a handful of galleries and restaurants into a monthly *ArtWalk*. Today, the *Tremont ArtWalk*, which celebrated its 20th anniversary in 2013, continues to draw roughly 4,000 art lovers and pub crawlers the second Friday of each month. Votava points to the *ArtWalk* as being a critical driver to the neighborhood's attractiveness and the catalyst for developing the extensive activities available today. "Everything kicked off with the *ArtWalk*," Votava says.

As community support for the arts grew, so did the number of programs related to arts and culture. Marking their eleventh anniversaries in September 2013, *Arts in August*, *Tremont Trek*, *Taste of Tremont*, along with the *Tremont Arts and Cultural Festival* (which celebrated its fifteenth anniversary in September 2013), have followed

in the footsteps of the *ArtWalk*. Arts and culture has become so central to the neighborhood's identity and sense of place that Votava even includes an "art yard" in the *Tremont Farmer's Market*.

Cleveland Bazaar

The Cleveland Bazaar, once known as Bazaar Bizarre Cleveland, is Cleveland's longest running indie crafts show, operating for over a decade. Throughout several shows a year, one can find dozens upon dozens of indie artists and vendors, all of whom display unusual and creative treasures. Items for sale range from earrings made from old vinyl records to designer tote bags made from recycled plastic bags. The funky, alternative, and eclectic vibe draws people to the craft shows, which helps the Cleveland Bazaar reach its goals –to draw people out of the malls and into the neighborhoods to support local and regional artists.

Website: <http://www.clevelandbazaar.org/>

Over time many of these programs, like the *Arts and Cultural Festival*, have grown significantly. Scott Rosenstein, Tremont West's Community Involvement Manager and Tremont Arts and Cultural Festival Manager, points to the 94 visual artists and twenty or so performance artists featured as part of the 2013 *Arts and Cultural Festival*, held in Lincoln Park in September. Rosenstein estimates that the first festival in 1998 attracted about 8,000 people, while 2013 organizers planned for a crowd of 25,000. Rosenstein points out that, unlike years past, the festival now covers the "whole park" and finding ways to fit everyone in has become a problem. Nonetheless, "That's a good problem to have," he says.

Redefining Place

With the establishment of new arts and culture venues and events, outsider perceptions of Tremont changed and the next wave of in-migration attracted non-artists seeking to surround themselves with the culture and vitality that artists had created.

“People began to realize it was someplace special,” says Rosenstein. “With the coming of artists came the people who wanted to be around such a space. Young singles, couples, [and] empty nesters found Tremont a cool place to be.”

The process of gentrification often is a double-edged sword for neighborhoods revitalizing through the presence of arts and culture. While an influx of new residents increases property values and draws in new businesses, with it also comes the potential for displacement. Rising rents and increased competition for space often threaten to price out the original residents, in this case the artists and galleries, that had made the neighborhood highly desirable to the subsequent waves of residents.

Local artist and writer Josh Usmani explored the extent to which the forces of gentrification may in fact be displacing Tremont’s arts and culture assets. In a *CoolCleveland* article Usmani asked “Is Tremont Still an Art Community?”¹⁵⁸ He asked artists and gallery owners to weigh in. Many, including Usmani, observed that restaurants, bars, and boutiques have seemingly crowded out galleries.

“Every time I go out to Tremont I see more people at bars and restaurants than galleries,” Usmani wrote.

In the article, artist Dana Depew, who ran Tremont’s celebrated non-profit Asterisk Gallery from 2001 until it closed in 2010, chalked up the shrinking presence of art to a simple matter of economics: “The bottom line is affordability. The model has existed forever; artists come in when rent is cheap until the place becomes nice and is no longer affordable. . . . Galleries just don’t generate a lot of income compared to restaurants or shops.”

Also contributing to this trend is the dual role that galleries play as both promoters and sellers of art.

“The art gallery business is like a labor of love, especially for unconventional artists who care more about making statements than selling their work”, gallery owner Paul Duda says. “Once rents start to go up, artists can’t afford to stay there any longer.”

The Survey of Galleries, Shops, and Studios, which focused on a group of 21 organizations throughout Cleveland, confirms this dual role as gallery and shop owners report viewing themselves as primarily promoters (31%) or exhibitors (27%) of art and identifying an economic role for their work to a lesser extent, identifying themselves as exporters (16%) or importers (14%) of art.

Evolving Cultural Tastes

As Tremont’s desirability as a neighborhood grew over the past decade, demand for collectible art pieces declined. According to Votava, the recession of 2001 led to a significant drop in sales as fewer art buyers from New York were coming to town to take advantage of lower Midwest pricing to expand their

¹⁵⁸ Josh Usmani “Is Tremont Still an Art Community? A Conversation with Cleveland Artists”
<http://www.coolcleveland.com/blog/2013/07/is-tremont-still-an-art-community>

collections. The more recent Great Recession, followed by a tepid recovery, has also meant that those who frequent the *ArtWalk* and *Arts and Cultural Festival* are more likely to be browsers than buyers and more likely to enjoy dinner or drinks at one of Tremont's eating houses than leave with a "luxury" art purchase from one of its art houses.

However, for galleries throughout Cleveland, recovery from recessionary challenges has been uneven. The Survey of Galleries, Shops, and Studios, which focused on a group of 21 such organizations throughout Cleveland, revealed that sixty-three percent (63%) of respondents actually saw an increase in sales over the last three years, but for many of them this did not come easy. Some pointed to the fact that they were hit hard during the recession, and the last two years of growth in sales have merely recovered those losses. The other 40% that reported either declines in sales or staying the same indicated that it has been a challenging environment to be a gallery or shop. Looking to build business beyond face-to-face interaction, 62% of galleries/shops use the Internet as a marketplace. Beyond art, more than half of respondents indicated that they venture into sales that are not art related, or are art peripheral (i.e. framing, posters, etc.); this allows them to diversity their product line. In Tremont, these broader trends are driving new approaches to promoting arts and culture as well.

Votava and Rosenstein acknowledge that rising rents in Tremont have put pressure on galleries and pushed artists to exhibit in less traditional ways. Votava himself was forced to close his own Fruit Avenue Gallery, which he opened in 1998, and he counts only a few exhibition spaces that remain open. With fewer galleries, it is now becoming commonplace for Tremont's bars and restaurants to double as exhibit space. Local establishments arrange to display the work of regional artists, rotating pieces around monthly. This shift has changed the type of art displayed, as installation, three dimensional, and crafts are eschewed in favor of two-dimensional visual arts. Some artists, like Angelica Pozo, also see differences in the type of artists that are willing to display in these non-traditional venues, which tends to skew toward artists in the early stages of their careers. She notes many established artists would not want to have their art displayed in poorly lit settings, making it difficult to fully appreciate the work. Many such artists, she contends, still prefer the gallery model where the art itself is the focus for visitors. The Survey of Visual Artists also confirms the continuing prominence of galleries as locations for selling or displaying art with most respondents indicating that they display their art in galleries (24%).

Angelica Pozo

As a full time, self-employed artist, Angelica Pozo splits her time between her widely exhibited sculptural studio work, artist-in-residence programs, and major public art commissions. These commissions include designs at the RTA Airport Station, the Market Place Bench by the Quicken Loans Arena in Cleveland's Gateway District, as well as mosaics at Rainbow Babies Children's Hospital and the Cleveland State University Law Library.

A New York City native born to parents of Cuban and Puerto Rican descent, Angelica Pozo moved to Cleveland in 1984 after receiving her Master of Fine Arts degree at the University of Michigan in Ann Arbor. Pozo has been awarded the Individual Artist Fellowship by the Ohio Arts Council and an Arts Midwest/National Endowment for the Arts Regional Artist Fellowship. Additionally, some of her work is part of a permanent collection in the Museum of Art and Design in New York City.

Website: <http://www.angelicapozo.com/>

Other innovative mechanisms for the delivery of art include the concept of pop-up galleries or temporary exhibitions that avoid the long-term overhead of a permanent gallery. Votava has used this

tactic with increasing frequency as a way to be more strategic and creative in how he showcases art. From October to December in 2012, he organized a pop-up show similar to the conglomeration of pieces and products assembled through the Cleveland Bazaar, a nearly decade-old craft fair. Votava's pop-up show included a variety of fine art and craft items, which he used to help market the *ArtWalk*'s 20th anniversary celebration. The pop-up gallery model, though certainly important for the continued vibrancy of the art scene, may suffer from similar issues as displaying in restaurants and bars. Though the art is certainly the center of attention, the types of art remain limited since large and heavy installations may not be feasible for shows with very short lifecycles. The Survey of Visual Artists also reveals that online platforms for selling art are gaining prominence, with 14% of respondents indicating they have used such virtual space – the second-highest category behind galleries.

Although many rightfully lament the loss of well-known galleries like Asterisk, gallery owner Paul Duda has welcomed the new, wider mix of activities in the neighborhood and does not feel threatened by bars displaying artwork. The way he sees it, Tremont will continue to be a visual arts destination if there is more artwork on display. Additionally, Duda is happy to see *ArtWalk* spotlight local salons, antique shops Cleveland Auction and Tremont Emporium, and clothing boutiques Banyan Tree and Evie Lou, in addition to the neighborhood galleries, bars, and restaurants. He believes people are attracted to the idea of a fun evening out and want to be able to eat dinner, have a drink, shop for a vintage toy or unique jewelry, get some ice-cream, and buy a piece of art.

"The more that goes on, the better for everybody," he says. "You have to have destinations to make it fun for people to come down."

As the notion of display space has changed, so has the neighborhood's notion of art. Part of this change comes from the recognition of the culinary arts as a new and important addition to the art mix. "We're all entertaining food as an art form," Votava says. "We have had very high-end chefs come out of here." Chefs like Lolita's Michael Symon, Fahrenheit's Rocco Whalen, and Dante's Dante Boccuzzi have all garnered national attention.

The shift in the gallery model toward non-traditional space poses challenges for artists who may not be accustomed to working outside of more formal gallery spaces. However, Tremont continues to offer a mix of options for displaying art and remains a fertile ground for new and burgeoning artists. The neighborhood also continues to find new ways to keep arts and culture opportunities available to ensure they are meeting the evolving desires of residents and arts patrons alike.

Local Placekeeping, Regional Placemaking

Even in cases where an artist, whether due to issues of affordability or not, chooses to live outside of the neighborhood, there is a push to nonetheless engage them in the arts and culture programming in Tremont. Much of this push continues to come from Tremont West, which hosts the majority of arts and culture programs in the neighborhood, including the *Arts and Cultural Fest*. Though not explicit in the organization's strategic plan, Executive Director Cory Riordan emphasized that arts and culture is an important part of the fabric of the community, and contributes to Tremont West's mission of making the neighborhood a "national destination."

"We continue to look for ways to express [Tremont's special qualities] to make it a desirable place to live," Rosenstein says.

To that end, Tremont West has worked to keep arts and culture in the neighborhood and deliver arts experiences in ways that reflect the changing behaviors of arts consumers who increasingly want to engage with arts and culture in more experiential ways. In many cases this entails bringing art out of formal gallery spaces and into the neighborhood. Examples include public art projects like *Lucky Fireflies* and innovative “un-programming” like street violinists that lend a feeling of spontaneity and help build an urban ambiance reflective of the neighborhood’s artistic fabric. Tremont West also recently had success in bringing the Beck Center for the Arts, a Lakewood-based non-profit arts institution, to a vacant storefront in their building. The Beck Center in Tremont currently offers classes for adults ranging from drawing to improvisation open to residents and visitors alike. Tremont West and the Beck Center are actively working to establish new partnerships to keep the Beck Center involved in the neighborhood.

Additionally, Tremont West recognizes the importance of expanding the perceived boundaries of the neighborhood to leverage the Tremont brand and encourage development in “Greater Tremont” beyond the traditional arts district. The most visible part of this effort has been the aggressive use of Tremont branded signage outside of what is traditionally viewed as Tremont’s arts district. Visitors are now greeted with signage and banners at the neighborhood’s gateways along Clark, W. 25th, and parts of Scranton. These areas have largely missed out on the arts-based economic revival in the neighborhood’s core further north. By expanding what is perceived as Tremont it is hoped that many of these benefits, like an improved housing stock and rejuvenated commercial districts, will naturally begin to expand outward.

Finally, Tremont West is currently working with Angelica Pozo to develop an innovative artist-in-residence program for Tremont that would be geared toward developing art with, by, and for residents. The proposed program, which is designed with existing Tremont artists in mind, could potentially buffer said artists from continued increases in rents and property values, helping to create strong artistic anchors that act as a foundation for neighborhood arts and culture. “We continue to look for ways to express [Tremont’s special qualities] to make it a desirable place to live,” Rosenstein says.

Rosenstein admits to feeling a twinge of concern as other Cleveland neighborhoods seek to grow their art presence: “Arts funding is always competitive. From the standpoint of community development, that’s a shrinking pot. As more and more neighborhoods go after grants, it gets more competitive.” His concern is also more basic than competition for limited buyers and grant resources; it’s a matter of civic pride: “The thought crossed my mind that I was so ... proud of Tremont that I wanted it to be unique.”

Despite wanting to maintain Tremont’s special qualities, Rosenstein says he now welcomes more communities to follow Tremont’s lead: “I was a little threatened by some [of what has been going on in the other Cleveland neighborhoods], but a rising tide lifts all boats.” Rosenstein says. “As West 25th Street [in Ohio City] has done better, I think there’s a spillover effect. As communities grow and they become connected more and more, I think it builds up all the neighborhoods. It helps each area to be more desirable.”

Votava echoes Rosenstein’s concerns about competition, but he believes neighborhoods must focus on their different assets. “We attract a very specific crowd,” he says. “I go out all over the place. Ohio City is a very different crowd. Each neighborhood has to look at what makes it attractive.”

Tremont has successfully demonstrated that when neighborhoods focus on their unique assets they not only improve the lives of their own residents, but also contribute to a stronger regional mix of amenities for Cleveland's visitors and residents.

ST. CLAIR SUPERIOR: CREATIVE REUSE

Cleveland's St. Clair Superior neighborhood is making a name for itself finding value where so many others see waste. Whether in empty 2-liter soda bottles, unwanted vinyl flooring remnants, discarded sterile packaging material, or abandoned two-story homes, the Upcycle St. Clair project sees repurposing as the path to this neighborhood's revitalization.

Visual artist Nicole McGee describes upcycling as a process that takes a material other people don't assign value to, and which is otherwise headed for a landfill or recycling plant, and creatively transforms it into a valuable object. She is also part of a broader partnership with the St. Clair Superior Development Corporation (SCSDC) to leverage this upcycling spirit in the neighborhood through a project called "Upcycle St. Clair." In June 2013, the Upcycle St. Clair project was awarded a \$375,000 grant from ArtPlace America, a consortium of six banks and 13 national and regional foundations. The 18-month grant is being used to pursue an arts-based strategy that dovetails with placemaking efforts already underway in the neighborhood.

"This is not the only arts-based strategy we have, but it is clearly the most significant both from the scope and from the fundraising capacity," says SCSDC Executive Director Michael Fleming. Counting the ArtPlace America grant, the SCSDC has raised more than \$500,000 to help revitalize the St. Clair Superior neighborhood east of E. 55th Street. "That doesn't even include housing, which we are also working on." Fleming says the ArtPlace funding for the Upcycle St. Clair project is providing a "hook" for the Retail Ready economic development strategy the SCSDC launched in 2012: "The ArtPlace component is infusing our existing efforts with the arts," Fleming says. "We had a really interesting business strategy behind this."

The Retail Ready program provides small grants and free rent to businesses that want to move into vacant storefronts on St. Clair Avenue. Although the project was attracting support from potential business owners and the media, Fleming says his group realized "that there wasn't that clever hook that neighborhoods need. We wanted to make sure that we included the arts in there. So, when we pulled those two together, we saw that a lot of our artists were doing upcycling. Either creating art or doing something for sale, but basically everyone was doing something in that sort of creative reuse model."

Building the "Art Quarter"

For more than a decade, artists have been migrating to the St. Clair Superior neighborhood, home to a mix of industrial and residential buildings stretching along the two east-west avenues from E. 18th Street to E. 65th Street. In 2002, the neighborhood became designated a Live-Work Overlay District, the first in Cleveland, which spurred growth in the neighborhood's arts and culture presence. For example, Tower Press, a century-old industrial site at E. 19th and Superior, was the first live-work loft project developed under the new zoning ordinance enacted by the city to encourage the development of artist studio spaces. Of the facility's eighty units, sixteen were made available at under market value rates to accommodate artists. In another converted warehouse along E. 30th Street, Zygote Press provides printmaking facilities and individual studio space, Terra Vista Studios offers airy workspace for ceramic artists, and ArtSpace Cleveland works to help local artists find affordable live-work options. The LoftWorks Building, a former automotive plant at the corner of E. 40th Street and Payne Avenue, now houses a photography studio, galleries and a jewelry designer.

The growing concentration of artists and arts and culture organizations led to the area's renaming in 2007; it is now known as the Cleveland Art Quarter. The ArtPlace grant is allowing the St. Clair Superior neighborhood to build on its success in attracting artists to grow retail presences and expand economic activity, all the way to the neighborhood's easternmost edge. To continue building on this momentum, the SCSDC wanted to develop a strategy for leveraging the neighborhood's underappreciated objects and places from a new perspective.

Creative Upcycling

Fleming approached McGee in February 2012 about the placemaking and retail potential of creative reuse. "We activate vacant retail spaces," says McGee, whose Collective Upcycle shop has popped up in empty storefronts around greater Cleveland, including, Gordon Square, Shaker Square, and the Fifth Street Arcade. "Part of the goal of the Collective Upcycling effort was to create an ongoing retail experience" to keep people interested in local products and raise awareness of "the value of secondhand."

Morgan Paper Conservatory

Located on E 47th St. in Cleveland's Midtown neighborhood, the Morgan Paper Conservatory is an organization dedicated to preserving the art and production of hand papermaking. The organization is primarily education-driven, teaching people how to make paper by hand. Currently the Morgan Paper Conservatory teaches people papermaking, book arts, letter press, and silk printing.

The organization also offers students internships and actively promotes education. The goal is to establish the Morgan Paper Conservatory as an anchor encouraging artists to stay in Cleveland. The exhibit space displays invitational portfolios, which provide a platform to paper artists. Beyond their educational and preservation goals, the Morgan Paper Conservancy also aims to provide locally-sourced materials for their products through their garden. The garden has 51 Kozo trees for Japanese paper, as well as other plants, like indigo, to make dyes unique to the organization.

Website: <http://morganconservatory.org/>

Today, the ArtPlace grant is supporting the creation of Collective Upcycle's permanent home on St. Clair, where sixty regional upcyclists will display their products at the store, similar to the Ten Thousand Villages model, as described by McGee. To be considered "upcycled," 75 percent of each product must be a resourceful reuse of other products. Products will be sold on consignment, with seventy percent of each sale going to the artist and thirty percent going to the store. "Artists from all over the region will be featured," McGee says, "but they have to upcycle." McGee says the goal of the Upcycle St. Clair project is to build an economy around the practice. "We've sold the goods of 65 upcyclists [through the pop-up events], and there are way more out there. . . . We've proven the model. The pop-up model has definitely worked."

Adding to the Upcycle St. Clair marketplace will be a creative resource center, which McGee will run. This center will function as a "thrift store" for craft supplies culled from waste products. Artists, teachers and other creative types may find inspiration amid fabric remnants, wallpaper rolls, washers, sterile equipment packaging, or even a box full of wine corks. "If you have two corks from a wine bottle, you probably wouldn't think of a use for them, but if you had a big box of corks, then that inspires imagination," McGee says. "We're taking materials that can't be recycled and finding a different use for them." She envisions a mutually beneficial arrangement. "We're helping them [the suppliers] get rid of things" they see as waste. Meanwhile, artists have access to inexpensive, imagination-inspiring supplies, and the St. Clair neighborhood gets an innovative new business.

McGee admits to building on the model of ZeroLandfill, an upcycling program that channels outdated samples of interior designers and architecture firms into the hands of artists and arts educators in need of creative supplies. The ZeroLandfill program began in Northeast Ohio in 2006 and has since spread to about twenty markets throughout the nation. McGee says she was also inspired by the work of the Scrap Exchange in Durham, North Carolina, which has served as a model for collecting materials from local businesses and distributing them to artists, craft-makers, and arts educators. McGee envisions her Upcycle Parts Shop as a means to engage the community not just in retail activity, but also through community partnerships and workshops.

In addition to the Collective Upcycle and the Upcycle Parts establishments, the ArtPlace grant will help create a permanent home for the Cleveland Flea. The Flea, described on its website as “part urban treasure hunt, part culinary adventure, part maker center,” began in February 2013 as a marketplace for about twenty vendors as part of the Kurentovanje or Slovenian Carnival Festival. The St. Clair Superior neighborhood that is the ArtPlace grant’s target has a rich Slovenian history, encompassing the historic Slovenian National Home and nearby St. Vitus, Cleveland’s first Slovenian Catholic parish. The Flea returned to the neighborhood in April as a Saturday market day for local artists, artisans, and vendors, and has continued to take place monthly in various locations around the neighborhood.

Fleming depicts the upcycling strategy – adding value to something seemingly valueless – as complementary to other revitalization efforts underway in the neighborhood, including a partnership with Loft Home Builders, Inc. and the Cuyahoga Land Bank, to develop affordable, desirable housing options. The home renovation plan converts vacant, outdated two-story duplexes into single-family homes with open and airy floor plans. Because the redesign eliminates some of the structural, electrical, and ductwork components, the homes can be rehabbed for \$10,000 to \$15,000 – only a few thousand dollars more than it would cost to tear them down. So far, two houses in the neighborhood have been gutted and rehabbed as part of the effort; four more are under way. The two renovated homes rent for \$400 to \$500 a month. “We wanted this to be an artist-driven housing project,” Fleming says; so far the plan seems to be working: He has a waiting list of thirty people, mostly artists, hoping to move in.

Building the Broader Community

“Arts are happening here,” Fleming says. Upcycle St. Clair, however, has “more than just an arts focus - we’re pairing it with economic development.”

Consequently, the SCSDC has looked toward their Retail Ready economic development strategy, modeled after a similar program in Bethesda, Maryland. That program, called the Vibrant Streets Initiative, bills itself as a toolkit for helping communities grow retail spaces “from the grassroots up.” Fleming makes clear “the buildings targeted for the program aren’t falling apart - they’re not burned-out buildings, they are just closed up.” Since Fall 2012, the Retail Ready offer of small business loans and six months’ free rent has attracted four new establishments – a dance studio, a genealogical society, Santana’s Artist Gallery and a coffee and bakery shop. “Part of what we wanted was to import a number of businesses all at once,” Fleming says. “The problem was that not everything fit the space. The infrastructure has taken time to develop.”

Infrastructure refers to more than simply the physical presence of adequate buildings and roads; it also entails the know-how for creating a product, gauging a potential market, accessing funds, and starting a new business. The SCSDC development strategy is part business attraction and part business creation modeling. Witnessing the creativity going on around them and experiencing upcycling opportunities through workshops and other community events encourages residents to think, “I can do this. I can

make this,” Fleming says. Collective Upcycle and the Flea give potential neighborhood entrepreneurs sales outlets to test their products’ viability. Over time, the budding entrepreneurs may be able to expand their products into storefront businesses. “We’re laying out all the steps for people,” he says.

Though the Upcycle St. Clair program zeroes in on the traditionally Slovenian commercial district along St. Clair Avenue between E. 60th and E. 65th Street, Fleming believes the development strategy’s benefits will spill into other parts of the ethnically diverse neighborhood. As an example, he cites the artists and artisans living and working in the AsiaTown district along St. Clair and Superior Avenues a few blocks west. Those artists, he says, need public exposure and retail access to help sell their creations. The neighborhood’s overall marketability is also enhanced by its convenient highway access and its proximity to both downtown and University Circle’s cultural attractions and health industry hub. These factors would indicate that a spark in the Slovenian commercial district could potentially lead to spillovers for the rest of the neighborhood.

Nicole McGee

The ongoing Collective Upcycle pop-up shop, now entering its third year, and the new Upcycle Parts Shop (expected launch Spring 2014) each share a common founder - Nicole McGee. Her personal artistic expression, is manifested through her company Plenty Underfoot, whose products can be found throughout Northeast Ohio, from restaurants to non-profits. McGee has championed upcycling for years, and her business has transformed countless discarded products into jewelry and home furnishings.

McGee is also planning to launch what she calls the “Shop the Window project,” displaying various artisans’ upcycling products in otherwise empty storefronts and allowing shoppers to purchase items through the ease of Quick Response (QR) codes. The potential for this project is considerable given how vendors across the nation and around the world have successfully used QR codes to enable commuters, pedestrians, and window shoppers to buy everything from groceries to Christmas presents through their smartphones. McGee has her eye on an empty storefront in Shaker Square but plans to experiment with the process in other high-traffic sites throughout the area. Ideally, McGee says, the “activated” vacant storefronts will help artists sell products, raise the visibility of individual artists, and increase recognition of upcycling in general. Through her own and other artists’ upcycled art, McGee has shown that upcycling is a personal passion she is determined to share.

Website: <http://www.plentyunderfoot.com/>

To encourage the neighborhood-wide appeal, the SCSDC has been using art to engage the public and brand the neighborhood. On an empty lot at the corner of St. Clair and E. 64th Street, a kiosk system containing doors on seven turnstiles label the neighborhood “ST CLAIR” and invite residents to share their visions for the community. In the future, Fleming and McGee envision a vibrant streetscape of color designating a revitalized retail district. “Part of what we want to do with coloring the street is to make sure we have impact beyond the grant,” McGee says. “It’s important that we’re building the area and not parachuting into the community. It’s important that we’re building community, not just ‘doing something’ to it.”

While Fleming says some St. Clair Superior residents tend to see the neighborhood’s better days firmly in the past, he hopes the SCSDC’s efforts will encourage them to “be positive about their neighborhood again.” Unique placemaking activities, like those provided by the Flea and Upcycle shops, attract people from outside the neighborhood, and even outside the region to their area, exposing them to the positive

changes taking place in the community. Long-established businesses have reported increasing numbers of customers coming in to shop, eat, or browse, Fleming says. “That exposure is really, really helpful.”

The parallel between the work of local upcyclists and the SCSDC is clear – both are innovatively taking something that is undervalued, whether it’s a piece of scrap material or a whole neighborhood, and reimagining it as something far more valuable. “We’re polishing off and uncovering the assets that are here,” McGee says. “It’s the strategy that feels like it makes the most sense. What we have around us and underfoot is what we need.”

PUBLIC ART: PLACEMAKING IN ACTION

Public art is intrinsically linked to the character of its public spaces. Public art can also test local perceptions: Is painting on the exterior of buildings creative expression or unwelcome graffiti? Are statues and displays worthwhile uses of limited funds, especially when communities are faced with difficult issues like poverty, joblessness, and failing schools? Such questions are important to consider as public art is increasingly valued by developers and community leaders alike for its power to build and brand neighborhoods, leverage existing assets and reveal future purpose.

"Public art" can be a challenging term to define. Murals on exterior walls that commuters pass by every day and statues in public parks would certainly fall within the definition. However, the definitional gray areas of public art are where questions most often arise. In the case of the statue, does public art also extend to the essential components of the park in which it resides? Can the definition be applied to benches that invite commuters to sit and rest while they wait for a bus? Surprisingly enough, many designers would argue yes.

"Public art in the most traditional sense is the insertion of beautiful and meaningful structures" into public spaces, says Terry Schwarz, director of Kent State University's Cleveland Urban Design Collaborative (CUDC), which is headquartered in PlayhouseSquare. Understood this way, public art's definition can be expanded to include sidewalk pavers, well-designed transit shelters, and beautiful trash cans. "It's not about looking at an individual paving or trash can. It's the haptic experience of the overall space. The paving and trash cans add up to the point of changing people's perception of a neighborhood."

Art's relationship and overlap with utilitarian elements create a condition in which public art and public spaces are intrinsically linked. "We would point out our front window at Market Square Park [in Ohio City] and ask is it art or is it a park?" says Ann Zoller, executive director of LAND studio, a nonprofit organization that seeks out opportunities at the intersection of art, landscape, neighborhoods, and development. "Or is it a combination of both? The park component is very much reliant on the art component."

Despite public art's somewhat abstract and porous nature, it nonetheless represents a powerful tool for placemaking by sparking community dialogue, nurturing community potential, and by helping residents envision new uses for old spaces. In all three functions of placemaking, public art can help inject energy and investment into neighborhoods.

Spurring Dialogue

Amy Callahan, director of Waterloo Arts (formerly Arts Collinwood), admits to thinking a lot about the nature of public art in 2013. Callahan spent the year overseeing and watching *Zoetic Walls*¹ come to life, a project of 10 murals painted by various local, national and international artists on buildings around Cleveland's Collinwood neighborhood. "I naively thought when we started this project that it would be simple," Callahan says. On the Internet, Callahan found pictures of murals in cities around the world and wondered, "wouldn't it just be cool to go paint murals, and everyone will love them?"

As it turns out, not everyone in Collinwood loves the murals, which were completed in June 2013. "You just get a reaction much faster when you put up art in public areas than if you put anything else up," Callahan says. People expect to see billboards, telephone poles, and business signs in their public

spaces, but “as soon as you put up a piece of art, a million opinions start to fly.” Some residents were angry about a mural in a prominent spot on the corner of Waterloo Road and East 156th Street that was painted by Argentinean artist Ever. Questions for Callahan abounded like “why did the man in the painting resemble Fidel Castro?” and “why would she allow a mural that seemed to promote communism?” Other residents questioned the meaning of another mural in which an individual is shown wearing a gas mask. “Was the artist calling their neighborhood ‘stinky’?” they asked. Still others wondered why artists from outside of the community were commissioned to create art within it. Callahan understands such perspectives from community members and says the exchange of energy that comes from public creations is worth some people disliking the work. In fact, Callahan purposefully did not seek to approve sketches or ask to see plans. She did not want to “pick” at the art. “To me that sort of ends up killing the energy that is so positive,” she says. “I’m OK not loving everything.”

“Not loving everything” is often what leads to public conversation and debate. Callahan describes an encounter that occurred when a resident began yelling that one of the artists should go paint “in his own neighborhood.” Another resident who lived near where the mural was being painted came out to ask why the critic was giving the artist such a hard time. “I feel like even those kinds of criticisms are fine,” Callahan says. “They create a dialogue.”

Nurturing Potential

Neighborhoods often find public art not only starts conversations, as was the case with *Zoetic Walls*, but also shifts the existing conversation about the neighborhood in a positive direction. This is true for Slavic Village, a neighborhood that at one point was referred to as the epicenter of the foreclosure crisis. In the wake of this designation, Slavic Village’s master plan for redevelopment hinged on the neighborhood’s Morgana Run Trail, Cleveland’s first multipurpose rails-to-trails project. As part of this trail, Slavic Village Development partnered with LAND Studio and artist Jake Beckman to develop *Rotaflora*, a 35-foot-tall whimsical flower sculpture made of bicycle wheels to mark the trailhead and give the neighborhood a focal point. These investments were a strong statement affirming the neighborhood’s rebirth, particularly to the thousands of commuters that pass the *Rotaflora*—or “Dr. Seuss Dandelion,” as it is affectionately referred to by LAND Studio’s Managing Director Gregory Peckham.

A few miles away, an 18-foot-tall statue of a trumpet player heralds the Art & Soul of Cleveland's Buckeye neighborhood, transforming a park into a statement about the community and its values. In this case, as with Slavic Village's *Rotaflores*, the power of public art to define communities is quite clear. "We can cite a dozen instances where we finished a project with a strong visible public art piece and immediately it was adopted on the front of organizations' annual reports," Peckham says. "Almost universally, the photographic landmarks in a city are these unusual public art pieces that define places."

These types of public art projects, however, serve as more than visual landmarks and tools for neighborhood branding. In fact, the potential economic development impact of these projects has, according to Zoller and Peckham, received greater acceptance among both private developers and political leaders. Starting in 2003, the City of Cleveland's required 1.5 percent of the budget for each new municipal construction or improvement project go toward artwork, which was a codified recognition of private and political acceptance. "There's growing consensus among our partners that [public art and public space] matters. There is recognition that investment in public spaces is an economic development tool," Zoller says. A decade ago, "we were more easily dismissed as the nice little park people." Back then, funding for public art pieces tended to derive from "money that was left over" after major development projects were completed. Now, there is a growing sense that the public art itself is a "difference maker" for neighborhoods. Because of art's growing significance for a community, Zoller and Peckham have noticed that private developers increasingly initiate the conversation with LAND Studio, seeking their input on projects around the city. This dialogue bolsters existing evidence for the growing consensus that quality of place, often enhanced through public art, is strongly linked to economic activity.

Zoetic Walls

Zoetic Walls came to fruition as part of an ArtPlace grant Waterloo Arts received to stage three exhibits, each exploring the theme of vacancy. Funds from the grant were also used to create a "Welcome to Collinwood" website. Nick Marzullo, a native Clevelander who created the organization Pawn Works in Chicago with street art as a focus, saw the website and contacted Amy Callahan, director of Waterloo Arts. Callahan admits to being largely unfamiliar with street art before Marzullo started talking to her about staging an event in Cleveland. The collaboration was a success, and Marzullo's relationships with artists have helped Callahan stretch her shoestring budget, allowing her to get 10 murals painted for roughly \$14,000.

An interesting twist to the project is that much of the art around the neighborhood is temporary. Three murals were even painted on buildings scheduled for demolition. This impermanent quality encourages freedom for exploration and creativity, particularly when compared to the planning and rules that involve erecting a new building or a new sign. "This is transitional art that allows you to not invest so much time," Callahan says. She hopes that adding interest to the walls of buildings around the community will call attention to the destruction and demolition that have leveled a number of the neighborhood's blocks. "A mural gets you attached in the way that you should be attached to a building," she says. Translation: "Maybe it means you'll notice" if it gets torn down.

Website: <http://artscollinwood.org/zoetic-walls/>

A New Perspective

Public art has the power to spur dialogue and help nurture a community, in addition to reimagining old, forgotten, or otherwise undesirable spaces. Both LAND Studio and Kent State University's CUDC have been involved in these types of projects, but each is taking a different approach.

The CUDC's *Pop Up City* initiative focuses on temporary and short-term interventions for vacant and foreclosed sites. The CUDC website highlights the opportunity: "Established by the CUDC in 2007, *Pop Up City* is a program that brings empty places to life through magical, ephemeral experiences that demonstrate how vacancy can be an opportunity and an adventure, not just a liability." Though *Pop Up City* was initially seen as a way of "reactivating the city," CUDC's Director Terry Schwarz suggests the short-term nature of the activities has proven to be a useful community engagement tool. "They help us make better design decisions," says Schwarz, who is nationally known for her upbeat and innovative approaches to transforming struggling cities. "They help engage the public in ways that we could not with a PowerPoint [presentation]. It gives people an opportunity to inhabit a future design, [and] to experience what a place could be like."

For example, one of *Pop Up City*'s early projects involved transforming a vacant lot on the East Bank of the Flats into a family-friendly winter wonderland for Leap Night 2008. With funding from the Civic Innovation Lab, the group created fire pits, a winter forest, an ice skating rink, a snowboard ramp, and snow and ice installations. The site was already owned by a developer, but redevelopment had been slow to materialize. Schwarz says the pop up event was meant to remind the public why this site's development, where the Cuyahoga River meets Lake Erie, was so important to the city. "There was just something about the Flats that nobody was going," Schwarz says "We were trying to change the perception about the Flats." Beyond changing perceptions, the project exposed the site developer to possibilities for public use.

Through another event in 2012, *Pop Up City* created a temporary streetscape downtown on Rockwell Avenue. The City of Cleveland had passed a Complete and Green Streets ordinance the year before, requiring 20 percent of all road-construction budgets go toward making the projects friendlier to pedestrians, bicyclists, people with disabilities, and the environment.

The temporary streetscape, dubbed "Pop Up Rockwell," was in place for one week as an effort to help people envision potential outcomes of the ordinance. It featured a dedicated two-lane bike path, or

Terry Schwarz

A Chicago native, Terry Schwarz moved to Cleveland in 1990 after receiving her Master's degree in City and Regional Planning from Cornell University. She worked for the Shaker Heights City Planning Department for ten years before becoming the director of Kent State University's Cleveland Urban Design Collaborative (CUDC), the university's architecture graduate program specializing in urban design. In 2009, she was awarded the Mid-Career Artists Award from the Cleveland Arts Prize.

In 2005, Terry Schwarz started the Shrinking Cities Institute, which aimed to explore the implications of large-scale population loss and urban vacancy. The Institute organized exhibits, symposiums, and research efforts to start a conversation about the City of Cleveland's urban transition. From this, *Pop Up City* was born. Examples of Pop-Up events include *Leap Night*, in which a vacant lot was transformed into a snow and ice installation on leap day; *Bridge Mixx*, a night celebration on a pedestrian bridge; and *Pop Up Rockwell*, a one-week experiment to test complete and green street improvements on Rockwell Avenue in downtown Cleveland.¹ This endeavor aimed to create programs that activated vacant and underutilized space throughout the city. The goal in each case was to inspire people to think of these areas differently and come up with unique solutions and uses for the vast amount of these places existing throughout Cleveland.

Website: http://www.cudc.kent.edu/about_us/people/

“cycletrack,” marked out with duct tape, as well as demonstration “bi-fi” sidewalk benches, which filter storm runoff while providing Wi-Fi access to those using the bench. “Basically the project was about taking an ordinance and giving it physical form,” Schwarz says. A physical representation allows people to interact with and better articulate their desired uses for a space.

LAND Studio’s projects, on the other hand, have tended to be more permanent. Take for example, Perk Park downtown and Market Square in Ohio City. Each was originally designed and built in the 1970s, a time when different sensibilities regarding public spaces were the norm. During that time, public spaces were often designed away from the street, which made access inconvenient for those most likely to use them, such as mass transit riders. Both parks had “outlived their useful lives,” Peckham says. Infrastructure was crumbling. Safety was an issue because of the lack of sight lines through the parks. “They were no longer functioning how the community wanted. They had to look and function differently.”

LAND Studio helped to facilitate a \$3 million redevelopment of Perk Park and a \$1 million redesign of Market Square Park. The positive effects of both projects, which were completed in 2012, include an increase in nearby storefront businesses opening. Long perceived as uninviting and unsafe, the redesigned Perk Park, with its expansive red canopy, concrete chairs and mood lighting, now draws lunching workers, young families, and dog walkers to an acre of tree-lined downtown greenspace at Chester Avenue and East 12th Street. On Wednesdays during summer months, visitors can enjoy a free outdoor concert while they dine on lunch from a nearby food truck. Market Square Park is serving as a “pivot point” to expand commercial development along West 25th Street south of Lorain Avenue. For both projects, it is hard to tell where “the park stops and the art begins,” Zoller

says, because the public art and the public park space are so tightly integrated. Market Square Park’s inviting landscaping, funky BookBox mini-library, coordinated wooden furnishings, and large mural celebrating the craftsmanship of Market District products work together to create a cohesive public space.

“When you say design, people think about fancy shoes rather than thinking about how you make something that solves a problem,” Peckham says. “But when people experience [a well-designed public space] they know that it feels right to them. . . . Public art is a part of that.”

LAND Studio

LAND studio has facilitated place-making efforts throughout Cleveland. In 2012 alone, LAND studio installed 32 public art works and spent \$1.8 million on design and implementation. LAND studio projects employed 127 artists and 39 contractors last year. “We spend a tremendous amount [of money] on artists and landscape architects and people like that,” LAND Studio managing director Greg Peckham says. “We certainly employ a lot of contract work, and people who fabricate local art projects are mostly all local workers. That’s where there is direct tangible economic impact. When anybody builds public art, there are all these people involved in making it, putting it together, putting it in the ground.”

LAND studio staff, working in separate organizations before a 2011 merger brought the thirty-year-efforts of Cleveland Public Art and ParkWorks together, helped the Slavic Village Development Corporation plant its new vision for the neighborhood with *Rotaflora*. LAND studio facilitates the creation of these defining pieces by helping match neighborhoods to artists. Selected artists work with neighborhood leaders, residents, and other stakeholders to develop works that reflect the image communities want to convey. LAND Studio executive director, Ann Zoller, adds: “Our work can be very symbolic in telling the story of what a neighborhood is hoping to achieve in a real physical way.”

Website: <http://www.land-studio.org/>

ARTIST ACTIVISTS: HEIGHTENING SOCIAL AWARENESS

Art can capture beauty; art can convey whimsy. Art can be commercial or personal, trendy or traditional, introspective or outward-looking. Art can also inspire collective action – even if that action is as simple as making us more aware of the consequences of our daily decisions.

The revelatory power of art makes it a powerful medium for shining a light on society. For millennia, artists have expressed their emotions, reflected on their societies, and spurred greater social consciousness through their work. The nonprofit Center for Artistic Activism goes even further, stating that art is the “bridge that connects uncommon, idealistic, or even radical ideas with everyday life.” This case study highlights two Cleveland artists who use the arts to raise public awareness of, and interest in, pressing issues they see around them in greater Cleveland. Donald Black, Jr., 33, has focused his hybridized photography techniques on exploring issues of foreclosure, father-son relationships, and racial divides, while Mimi Kato, 39, is shedding light, quite literally, on the spreading problem of invasive plant species.

“I have a hope for change”

Black-and-white photography projects an image in contrast, but nuances and distinctions lie in the gray values. Activist artists help to frame life’s “gray areas” and bring them into greater focus, Black says. By “creating artwork with a heightened social aspect to it, we’re looking for some kind of change to occur . . . I look at photography as very synonymous with how I perceive things; I’ve used it as a metaphor for how I live.”

A turning point for Black came while he was working in New York City building a small but successful commercial enterprise offering discount headshots to aspiring actors. He submitted his portfolio to a magazine editor, who reviewed his body of work and declared that he needed to “photograph more white people,” Black says. “It wasn’t conscious that I was photographing only black people. I was photographing mostly black people because that was who I was around,” he says. “I started wondering whether a photographer who photographed mostly white people, whether anyone, would say ‘you need to photograph more black people.’”

Black thought about all of his favorite photographers and how his attraction to them was predominantly based on their technical expertise. In particular, he had always been drawn to high-end studio photographs – photos that did not include a “huge array of black faces.” The comment nevertheless clicked with him. “It sent me in a different direction completely from the time I left the meeting.” He went home and painted his roommate in blackface, recalling the pose struck by hip-hop artist Mos Def on his 2004 album, *The New Danger*. Those photos became a series Black called “The Crisis of Realism.”

The exchange not only sent him in a different direction – encouraging him to reduce his commercial work so he could spend more time exploring what he wanted to say as an artist – but it also helped bring him home to Cleveland. “I had to do all sorts of jobs in New York to pay my rent. There was a huge economic benefit to moving back to Cleveland. It cleared my mind financially,” he says. “My only purpose for going to New York was to get away from home, to test to see if I could rise to the challenge.” He had started working with students in New York and, upon returning to Cleveland, led summer programs through the arts education group, Center for Arts-Inspired Learning (formerly Young Audiences of Northeast Ohio). Black worked with teens and preteens in a variety of after-school programs, teaching them about photography as well as life. “The whole goal is ‘what do you want to

say?” he notes. “Ultimately what you’re doing is about you, whether you are aware of it or not.” He quickly realized his story – growing up learning to draw from his mother, finding refuge from the neighborhood violence at school where he won a spot at Cleveland School of the Arts, and pursuing a passion for photographic technique and artistry at Ohio University – meant more to kids in Cleveland than in New York. When he was invited to work with the Center for Arts-Inspired Learning students for a second summer, Black opted to return to his roots. He never went back to New York.

That was the summer of 2008 – the year of the great U.S. financial crisis that threatened the global economy. Cleveland had already been impacted by the subprime mortgage meltdown, exemplified by the vast amount of boarded-up, abandoned homes. Black focused his artist’s eye on the issue. “It was very personal,” says Black, whose mother had worked as a general contractor when he was young and would participate in city-sponsored weatherization programs. When he drove around the city, he would see boarded-up homes he had shared with his mother throughout his childhood. Black had seen a couple of photography shows documenting the spate of foreclosures, but the photos had always been external shots of the houses. Those images felt distant and removed – and he was neither distant nor removed from what was going on in his hometown: “I became really attracted to what was inside the houses – the life inside. I was attracted to [the fact] that this was my community, [home to] a lot of people who look like me.”

In addition to his camera, he grabbed a screw gun, which he used to peel boards off of doors to gain entry to the vacant homes. Of the houses he explored, he had personal ties to only one, a house where his aunt had lived. “I felt like I was documenting some level of poverty. Being in my aunt’s house was like holding up a mirror. ‘Oh, wow, I’m a part of this,’ ” he says. “I went in the house to see what story was left.” He compiled a huge body of work – gritty black-and-white images of toys and trash and total abandonment. Then, he stopped. He thought foreclosure photography was becoming too popular, even cliché. He didn’t want his work to be misperceived as simply one more example of exploitative “ruin porn.” “I didn’t want to document ruins,” he says. “I was trying to be a voice for those inside the house, for those who didn’t seem to have a voice.”

Center for Artistic Activism

The Center for Artistic Activism was founded in 2007 by Steve Lambert and Stephen Duncombe to study and share research that surrounds the intersection between art and activism. Among the organization’s board members are a wide array of academics and artists, such as Jacques Servin, co-founder of the internationally recognized group the Yes Men. The group uses media tactics, including impersonating high-level government and corporate officials to make statements that deliberately contradict the actual policy platforms of particular organizations.

Lambert and Duncombe, recognizing the power that a dedicated non-profit could wield, set to work developing a robust organization with dedicated programs to support the Center’s mission. These included programs like the School for Creative Activism, a training program for grassroots activists on how to use creativity and the arts to win campaigns. Conversely, the weekend-long Art Action Academy—a workshop offered by the Center—was designed to engage artists interested in using their talents in change-making campaigns. According to the Center’s mission, “Creative activism is more than just an innovative tactic, it is an entire approach: a perspective, a practice, a philosophy. Our goal is to make more creative activists and more effective artists. We aim to win.”

Website: <http://artisticactivism.org/>

After completing his project on foreclosed homes in urban neighborhoods, Black moved on to explore what he perceived to be another sort of vacancy within urban families: absentee fathers. “The Power of the Pieces” was a temporary art installation Black developed in 2011 that recalled the relationship Black built with his own absentee father through chess. “My dad . . . would come and play me in chess when he was over partying on my side of town,” Black says. “I kind of really appreciated what the game of chess did for me.”

At the time, Cleveland Public Library and Cleveland Public Art (now LAND Studio) selected the installation as part of their See Also program, which installs a temporary work of art in the library’s Eastman Reading Garden each summer. Black crafted six chess tables, 2 by 3 square feet, and designed them to be played standing up. He added 1,000 chess pieces and used photographs of the six distinct chess pieces to label each table with a character trait: king – stability; queen – freedom; bishop – wisdom; knight – unique approach; rook – honesty; and pawn – risk-taking. Chess, as Black sees it, is a metaphor for life.

Hanging above the display was a 15 by 9-foot photograph of a young black boy and his father, heads meeting over the chess board. Models for the photograph were Black’s cousin and his cousin’s young son, but the story they tell is his personal one about finding moments of connection amid dysfunction. “I’m creating what I didn’t see or what I saw in a very scarce kind of way,” Black says. “It turned into wonderful dialogue. Everyone who learned to play chess seemed to have learned from their dad or granddad.”

Black is developing a new project he hopes to unveil in 2014. This work will break down and dissect terms and concepts both familiar and fractious. School. Prison. Poverty. He focuses on examining and exploring “figures and objects and symbols to tell my story,” he says. “I’m working on a body of work about public education and my perception of it as a kid and an educator. The education system is killing our kids so I’ll visually explore that, visual representation of factory-style learning.” He wants to convey perceptions of institutions in the black community that breed dependence. “I have a desire to be the one to tell you how the experience really works,” Black says. “I have a hope for change.”

“Let’s think about it”

Mimi Kato, artist-in-residence at SPACES Gallery, spent her summer researching plants and crafting thousands of reflective markers, preparing for two simultaneous, interrelated shows. The subject of her installation is likely unfamiliar to most: the runaway growth of the glossy buckthorn.

The glossy buckthorn, or *Rhamnus frangula*, has been identified by the Ohio Division of Natural Areas and Preserves as one of the 10 most invasive and difficult to control non-native plant species. Minnesota and Illinois have banned the plant, and the National Park Service has included the glossy buckthorn as part of a “least wanted” posting. Introduced from Eurasia as shrubbery for fences, the glossy buckthorn grows rapidly, reaching heights of 20 feet. This plant also develops vast root systems, tolerates a wide range of habitats, and produces copious flowers and fruits. According to the Ohio Department of Natural Resources (ODNR) website, “Once established, these species aggressively invade natural areas and form dense thickets, displacing native species.” Despite its raging proliferation and banning in two states, the glossy buckthorn is still available in Ohio for ornamental use in landscaping.

Kato’s installations explore the challenges the glossy buckthorn presents – costs of time, energy, and limited funds – as well as the difficulty in disposing of the waste generated from control efforts. Teaming with Jennifer Hillmer, the Cleveland Metroparks’ invasive plants coordinator, Kato came up with a plan

to depict the time and energy costs dedicated to controlling the spread of glossy buckthorn. She picked a day in which members of the Metroparks' Invasive Plant Management Team would be cutting the stems of mature glossy buckthorn surrounding the marsh and pond outside the North Chagrin Nature Center in Willoughby Hills. For each individual mature glossy buckthorn cut and treated with herbicide, Kato attached a reflective marker to a 7-foot-tall stake placed in the ground next to the severed stems. "I just want to know how much they can cut in a day," Kato says.

The stakes were connected by a string, from which Kato hung more reflectors to represent the many smaller offshoots of the plant that will require even more time spent in control efforts. From August to October, Northeast Ohioans could experience Kato's work by visiting the North Chagrin Nature Center after nightfall and shining a flashlight on the reflective markers, thereby revealing the tremendous efforts involved in controlling one plant species in one area on one day. "I like the idea that they have to shine a light and the light comes back to them," Kato says.

Her exhibit at the SPACES Gallery in the Ohio City neighborhood of Cleveland, a facility that touts itself as "the resource and public forum for artists who explore and experiment," focused on the waste produced by the control efforts. Kato expected more than 3,000 mature glossy buckthorn plants to be cut in one day of control efforts, which translated into multiple dump trucks full of debris.

Despite the plant's invasiveness, there is no clear solution for what to do with the waste. In the North Chagrin Reservation, park officials typically pile up the plant waste, Kato says. They cannot turn it into mulch because of the seeds. Struck by this image, Kato called an official at the ODNR, who told her to burn the plant waste. "That's not really ideal," she says. "That's going to pollute the air." Alternatively, the ODNR recommended putting the plant

waste in bags and putting the bags in a landfill. "Since buckthorn is already so widespread, it's already everywhere, they weren't taking an urgent view," she states. She tried calling other states to learn about their solutions. A natural resources official in Minnesota, which has banned the glossy buckthorn from being purchased or transported into the state, suggested she pile up the waste as a shelter for animals. "But with dump trucks full of cut stems, that would be tons of shelters," she points out. In her outreach to a number of states, "I never got an answer. No answer, no solution. That was pretty interesting to me."

Kato's installation at SPACES Gallery demonstrated how the cut stems could be used to make animal shelters, birdhouses, and walking sticks. She also bagged some of the waste to show how much of the material would be going into landfills. A fine line buckthorn, a hybrid version experts claim is non-invasive, was also part of the exhibit to provoke inquiry. "How do we decide what to do, what to plant, and what to hybridize?" Kato asks. "I'm not against the invasive plants. They're just plants. They still

Center for Arts-Inspired Learning

The Center for Arts-Inspired Learning, formerly known as Young Audiences, aims to enrich the lives of children through arts education while promoting creative learning. The Center works with professional teaching artists who are experts in their fields, ranging from dance, theater, and music to digital and visual arts. The Center also puts on workshops and has artist-in-residence programs. The 120 teaching artists help students from Pre-K through 12th grade explore art and use it to grow, learn, and succeed in the classroom. Throughout its sixty-year lifespan, the organization has served over seven million students in eighteen Northeast Ohio counties and has helped countless more through its advocacy, professional development, and community programs.

Website: <http://www.yaneo.org/>

produce oxygen. They do their thing as plants. I just want to start a conversation about how we make our landscapes.” She believes most people simply buy plants because they are beautiful or easy to grow. Another way to think of the invasive plants, she says, is that they are simply opportunistic – they exploit their advantages to make more of themselves. “I want to start the conversation about what do we grow.”

These shows represent a new art form for Kato, who says her previous work had mostly been photography projects she had worked on alone in her studio. She has long been inspired by landscapes, “how we make our surroundings,” but has never tried to “do something in the real world” until now. She’s excited by the potential for community engagement around this environmental issue. “It’s my show,” she says, “but also everybody’s show.”

Kato was first exposed to the challenge of non-native species a few years ago when she lived in Alabama. There she saw kudzu’s, also known as the “vine that ate the South” for its encroachment on some 7 million acres, impact on the environment. Kato recognized kudzu from her native Japan. She admits that her first reaction was somewhat nationalistic. “I thought: ‘Yay! Go, Japan!’ Plants that I knew were trying to take over.” She initially viewed the expanse of kudzu as a beautiful reminder of home, but then she realized how pervasive the plant was in Alabama. “It’s horrible in Japan, too, but not as bad.” She became intrigued by the fact she was seeing so many plants from her native land. She learned about the challenges of garlic mustard and burning bush. “Suddenly, I got really interested in why we are doing this, so much money and energy being expended.” The plants became metaphors for attractive quick fixes that end up being costly in the long run.

Kato says she is not trying to prevent people from buying plants they like, but she wants them to think about what they are doing and the potential consequences of their choices. “I’m not trying to force change; I just want people to think. Not knowing and participating is a scary thing,” she says. “I didn’t think about it before. Tiny plants grow into something bigger. Let’s think about it.”

Indeed, the “Let’s think about it” mantra underpins the artistic goals shared by Kato, Black, and the countless other artist activists using their talents to uncover societal issues that otherwise might go unchallenged.

CAN JOURNAL: PRESSING FOR CHANGE

Printmaker Liz Maugans saw a need: many of Cleveland's artists and arts and culture organizations were going unnoticed and lacked an effective platform for getting the word out about their work. Maugans knew that together their voices would be much more powerful and so the Collective Arts Network (CAN) Journal was born.

The art of printmaking is defined as the transfer of ink from a plate, block, or screen to a flat surface to create a single fine art print.

Yet this general description is deceptively simple. To produce just one print, a printmaker must carry out a number of steps and utilize a wide range of techniques. In the printmaking process known as intaglio, for example, a printmaker will first use a tool to create an image on a metal plate that is covered with an acid resistant material. The plate is then submerged in an acid bath to etch the image onto the metal. Next, ink is applied to the plate and wiped off so it only remains in the etched lines. Finally, a piece of paper is put on the plate and pushed with uniform force onto the plate using a printing press. This transfers the image from the plate to the paper.

Just as every component of this process – whether large or small – is required to make the final product, a strong arts and culture sector is built on the recognition and understanding that every individual artist and arts and culture organization, even small ones, are essential components of the broader cultural ecosystem.

The Spark

A 2009 Arts and Culture Roundtable hosted by the Community Partnership for Arts and Culture (CPAC) brought together members of the arts and culture sector during the height of the Great Recession to catalyze discussions on how the sector could develop strategies to weather the economic downturn. To facilitate discussion, those in attendance were asked to form four, impromptu breakout groups representing artists and small organizations, medium organizations, and large organizations. As the groups coalesced, participants like Liz Maugans, co-founder and executive director of Zygote Press on Cleveland's East Side, recognized that even within the smallest category, the range of challenges facing organizations were varied.

"It became clear to the smallest of the small organizations that their needs were materially different from others who put themselves in the small category, which included organizations with budget sizes up to \$500,000," says Megan Van Voorhis, chief operating officer of CPAC, who led the discussion among the small organization group. "They recognized a need facing the smallest organizations and were catalyzed to do something to address it."

Upon leaving this event, Maugans wanted to do something that would lead to greater awareness and appreciation for the important work the arts and culture sector does to make our city and region stronger, while ensuring that even the smallest organizations, like Zygote Press, were involved. Later that year, Maugans invited a group of local artists and leaders of arts and culture organizations to discuss the challenges they faced and how they could work together to overcome them. This meeting would become the basis for SALT (Sustainable Arts Leaders Talk) – a monthly convening of arts and culture leaders from organizations like BAYarts, City Artists at Work, Cleveland Arts Prize, CPAC, the Council of Smaller Enterprises' Arts Network, Orange Art Center and RED DOT Project. Although their missions were very different, one mutual dilemma soon emerged: exposure.

The *Collective Arts Network (CAN) Journal* was thus created with the goal of drawing attention to, and elevating the voices of, artists and organizations who they believed lacked an effective platform for promoting their work.

Filling a Need

This lack of publicity pointed to a clear need for a publication that would spotlight members of the arts and culture sector, especially those that were not well known. "All of these galleries need people to know what they are doing, and they need to be able to catalyze beyond to some sort of critical mass," says *CAN Journal* editor Michael Gill. "If you want [your exhibit] to be more than your friends getting together, if you want to be engaged in the arts economy, if you want to show people works of art not just because they are your friends, then you need public awareness. You need a way to reach people." The *CAN Journal* set out to on a mission to provide the publicity that was so important, yet often lacking.

Prior to the creation of *CAN Journal*, coverage of the local visual arts scene, and the visual arts sector in particular, often focused on the larger players in town, exploring exhibits and events happening at the Cleveland Museum of Art, the Cleveland Institute of Art, and the Museum of Contemporary Art (MOCA) Cleveland. More recently, challenges in the newspaper and periodical industries have shrunk coverage

Zygote Press

Four artist-printmakers, Joe Sroka, Liz Maugans, Bellamy Printz, and Kelly Novak, joined forces in 1995 after recognizing the need for a working fine-art printmaking facility in Cleveland. Through this synergy and collective effort Zygote Press was born. Zygote Press is a non-profit, cooperative, fine art printmaking workshop that offers studio space, printmaking equipment, and technical assistance to local artists. The organization aims to help artists create fine art prints in a collaborative atmosphere promoting the exchange of ideas, increasing awareness about the printmaking process, providing affordable studio space and exhibition opportunities, and stimulating communications between artist-printmakers and the broader community. Zygote Press also offers several different programs in printmaking for individuals of all levels, from novice to professional artists, including classes that teach participants to use the tools of the trade so they can leave the workshop with a tangible print creation.

To help further the connection between printmaking and the wider community, several initiatives have been undertaken: *Press on Wheels*, an opportunity that brings printmaking to students by offering them onsite visits of the facility; *The Printmaking Expedition*, a travelling expedition of the Zygote Press archives; and the *Works in Progress* program, which offers an open forum where practicing artists can present and discuss their work. The press also maintains an artist exchange, called the Dresden Program, which brings German artists to Cleveland and sends Cleveland-based artists to Germany. Through this collaboration, Zygote Press creates connections between the global printmaking community and the community here in Northeast Ohio.

Website: <http://www.zygotepress.com/>

of arts and culture across the board, but especially for exhibits and activities that fall outside the mainstream.

Comments from focus groups also echoed these concerns, voicing regret about the lack of quality local coverage of the arts even as artists and institutions in the region are recognized by outlets like *The New York Times*. Others note the lack of art critics and arts segments in local print media and broadcast media respectively. Even as the Cleveland Museum of Art engaged in its largest expansion in a century there was little more than a “blurb” on the 11 o’clock news. Referring to this perceived lack of quality of local media coverage, one focus group participant asked “why do we limit ourselves to something that is average?” The *CAN Journal* set out to fill this media gap by going well beyond “average”.

Working Together

Networking and collaboration have been the driving forces behind the *CAN Journal*, Gill says. The first issue was actually conceived as the only issue – a onetime overview of the local arts scene. Individual artists and groups would pay \$100 to be listed as a CAN member at the back of the publication. Membership fees would provide the match for a \$2,400 grant from the Ohio Arts Council.

Liz Maugans says she anticipated getting 16 members to sign on to the deal; the first issue, published in January 2012, drew support from 28 members. All members agreed to contribute content. “We each picked a member organization out of a hat” to interview, Maugans says. The group paid \$6,000 to have the *Plain Dealer* print 10,000 copies of the first issue as a newsprint tabloid. As a way to generate excitement and distribute copies, the *CAN Journal* staff threw a launch party, inviting members to mingle and take copies of the publication to share within their own organizations. Free copies were also made available at branches of the Cuyahoga County Public Library and Heinen’s stores.

Though the first issue was out, it did not happen effortlessly. “The problem with the first issue is that structurally we could provide an overview of the organizations, but we couldn’t do anything timely,” Gill says. Follow-up interviews with all 28 original members found overwhelming support for a quarterly publication that would allow local arts organizations to publicize upcoming events. “It’s hard to get these disparate organizations to participate willingly without money coming to them,” Gill says. “That makes this noteworthy.”

In demonstrating the value proposition, Maugans and Gill compare the cost of membership and member articles to the traditional way of promoting art exhibits through postcards. Printing and mailing 1,000 postcards to a list of potential patrons may cost \$500 or more. The *CAN Journal*, on the other hand, provides members a medium for showcasing their events to an audience ten times bigger and wider in scope – at a cost significantly less than \$500. “We looked at this as a model of cost effectiveness,” Maugans says.

Sustaining Efforts

Since the first publication, membership has grown to 55 galleries and organizations and 14 individual artists. Members submit their own articles, with galleries frequently providing a biography and perspective on an artist’s work. All the articles, which Gill edits for style and readability, are meant to preview and promote exhibits coming up in the next three months. Members pay \$125 for a half-page article and \$250 for a full-page write-up. Traditional advertising space is also available, costing members \$500 and non-members up to \$1,000 for a full-page display. “It’s a good deal,” Gill says. “We can’t really

price it much higher. We want it to be affordable for these small organizations. Being inclusive like that is important to us.”

The *CAN Journal* also received support from local businessman and longtime arts patron, Wally Lanci. He serves as corporate counsel for his family’s Consolidated Graphics Group printing business and agreed to print the *CAN Journal*’s first year of issues, in full color and on nicer-than-newsprint paper, for free. “Help from Consolidated Graphics has been pivotal,” Maugans says. “We talked to all sorts who print magazines. The cheapest we could do was tabloid newsprint . . . Wally Lanci has been amazing in his philanthropy. He walks in and says, ‘I will pay for the first year.’ That freed us to focus on getting off the ground and in the form we wanted.”

Lanci says he was drawn to the *CAN Journal*’s focus on galleries and smaller arts organizations, yet has been impressed by its ability to attract the interest of the region’s larger arts institutions as well. “When you look at the membership and the variety they have, I think that speaks volumes for the need for something like this,” Lanci says. “[Cleveland Museum of Art] doesn’t need to advertise in this, but they see the value.” He cites two features of the *CAN Journal* business plan as critical to its sustainability: membership and collaboration. Membership means there is “financial skin in the game,” which, in turn, enhances collaboration. “If there’s not enough skin in the game for each nonprofit, then collaboration sometimes fades away.”

In a mark of tradition for the young publication, launch parties continue to serve as the primary mechanisms for distributing the 10,000 copies of each edition. Each launch party for a new edition of the journal is held at a different member’s site. “That gets us around town and connects us in the community,” Maugans says.

Although she and Gill are thrilled with the growth in membership, they would like to see more community support for the publication through advertising. So far, most of the advertising has come through member non-profit institutions, such as CPAC and the Cleveland Museum of Art, as well as local community development organizations that appreciate how the publication groups activities by neighborhood. Gill, a former editor at the *Sun* newspapers and *Free Times* and former arts editor for *Scene* magazine, would like to see more restaurants and other businesses advertise, the way that they do in more traditional publications. “We need larger organizations paying for more,” Gill says. “We need more banks, hotels, for-profit advertisers. These are the sorts of things we need for actual sustainability to happen.”

Other challenges that have arisen for the nascent journal include a perception among some non-member artists that the *CAN Journal* represents a closed club of sorts. A focus group participant noted she viewed the *CAN Journal* as a network that strengthens connections within itself, but that it has yet to reach those unfamiliar or outside of the existing network. “It doesn’t reach the average person that is going to pick up the newspaper . . . it’s preaching to the choir” observed other focus group participants. Part of this issue arises from the fact the *CAN Journal* has, in large part, eschewed embracing digital and social media in promoting and supporting its primary print offering, aside from offerings available on their website. Overall, much of this criticism may be a direct result of *CAN Journal*’s relative youth, small size, and the fact that it was never designed to compete, or in this case supplant, mass media coverage of the arts – the true source of much of the criticism. The core of the *CAN Journal*’s brand in the foreseeable future is to remain the printed journal itself.

Printing in a Digital Era

In an era when long established print publications are folding or switching to online content, why take the risk of a printed journal? “Print helps crack the whip,” Gill says. “It’s distinctive. It’s limited and therefore people take it seriously. It requires more planning and forethought to get in.” He points out the journal also offers space online, at canjournal.org, for events that don’t make it into the printed version.

Maugans believes the infrequency of the quarterly *CAN Journal* helps make it seem more special than a daily newspaper or weekly magazine. “There’s something about these [journals] that they can be archived. We need bibliographies and something as artists that’s sexy and that’s written up about us . . . something that we can put in a PR packet. I just did a program down in Collinwood. I could have [promoted] it online through my blog, but this is something that people wouldn’t find online. It finds you instead of you trying to track it down.”

Looking Forward

Entering its second year, the *CAN Journal* kept with tradition and celebrated by holding a launch party. However, unlike in the past, the June 29, 2013, event was structured as a fundraiser called “Y2CAN”. The *CAN Journal* also experienced another milestone earlier in the month, when it emerged from under the fiscal wing of Maugans’ Zygote Press. As of June 1st, the St. Clair Superior Development Corporation assumed the role of fiscal agent for the journal. “The journal will still be part of our mission at Zygote Press. We will always be a member. I will be active as one of the founders,” Maugans says. “But this was always an aim of our board.”

While Maugans’ Zygote Press may have stepped away from fiscal control of the *CAN Journal*, the experience has forever changed her relationship with the local arts and culture community. The *CAN Journal* has led to the creation of a database of artists, galleries and organizations and has resulted in a sharing of grant-writing resources. “We really are tethered because of this experience,” Maugans says. “We all support each other. There is strength in numbers, energy especially... there’s cohesiveness in the fabric of this art landscape.”

Pressing for Change

As the *CAN Journal* enters its third year in print, the organization has begun to shift toward a greater advocacy role for arts and culture as a community development tool. “Broad acceptance of arts organizations and galleries can bring new energy to neighborhoods and catalyze rebirth,” Gill says. As examples, he points to the 78th Street Studios in the Gordon Square Arts District, the Waterloo Arts District in Collinwood, and the Quadrangle arts district in the St. Clair Superior neighborhood as helping to reinvigorate those communities culturally and economically by infusing art and retail spaces. Additionally, public support in the form of a cigarette excise tax, which Cuyahoga County voters approved in 2006, has been central to these creative and catalytic developments, he says. Thanks to this funding, Cuyahoga County (via Cuyahoga Arts & Culture grants) routinely provides more public funding in terms of real dollars to arts and culture than in all but two states – New York and Minnesota – uniquely positioning the region as a premier supporter of arts and culture nationally. Focus group participants echoed this, noting how essential it is that public funding for the arts remain strong so that the region can not only draw artists in from other elsewhere, but also its role in retaining existing artists and recent graduates of local colleges.

Maugans agrees public sector support has been critical. “I just think we’re in a renaissance here as far as arts go,” she says. “I can feel it.” Her next effort will be to use the *CAN Journal* as a platform for arts advocacy. She plans to invite key decision-makers – politicians, corporations, educators and community development leaders – to events that showcase research on the connection between creative workers and economic growth as well as artists who are actively re-envisioning Cleveland neighborhoods. “We need these groups to be our advocates. We’re taxpayers too. We care very deeply about our everyday practice. We need help to be able to vocalize our connection within the community.”

DAN CUFFARO: REMAKING THE REGIONAL ECONOMY

Innovative yet traditional, practical yet alluring, artistic yet marketable, reclaimed from the past yet positioned for the future. These qualities may seem like a tall order for a simple desk, but industrial designer-educator-entrepreneur Dan Cuffaro believes his Hive workstation encompasses all of these characteristics. His work demonstrates how inspired product design can drive business strategy and how building a design-based economy can play an important role in reinventing our region.

Dan Cuffaro, who heads the Industrial Design Department at the Cleveland Institute of Art (CIA), views the world around him conceptually as pieces that fit together into a functioning and artful whole. His designer's eye is trained to see all sides of a product and formulate ways to make it not only more functional, but also more visually appealing to its user. Cuffaro's skill manifests while figuring out a way to update a piece of outdated furniture, reusing components of deteriorated housing stock, or remaking Cleveland's regional economy.

For the past few years, Cuffaro has been busy working on all three of these challenges simultaneously through the creation of the "Hive" workstation, a design that utilizes reclaimed materials from abandoned homes in Cuyahoga County and unites them through modern design principles. He believes these products, designed and built in Northeast Ohio, teach an important lesson about leveraging capacity and identifying needs, in addition to pairing the two through practical yet innovative design.

As Cuffaro asserts, "The more Northeast Ohio connects its capacity dots, the better off it will be," because new products, such as his own, emerge where needs, resources, and innovation intersect. Identifying these intersections is essential since new products drive growth – both for individual businesses and for the economy overall.

Building on a Legacy

Think of Cuffaro as the champion of design-driven development in Northeast Ohio, building on a platform established decades earlier by the region's industrial legacy and the influential presence of "American Da Vinci" Viktor Schreckengost. Cuffaro even studied under Schreckengost, whose 70-year association with CIA led to the development of the Industrial Design Department that Cuffaro now directs.

David Deming, who served as president of CIA before retiring in 2010, considers Cuffaro his "best hire" in twelve years at the helm. "Dan is a disciple of Viktor Schreckengost and has embraced Viktor's legacy. He has been a spokesperson for helping Cleveland identify not just what its potential is but what it already is in terms of design."

Cuffaro left Northeast Ohio after graduating from CIA in 1991 and spent his early career in Boston, where he served as design director at Altitude Inc., an award-winning product development firm. Boston, with its wealth of prestigious design schools, high-profile design firms and its attractive urban environment, is a powerful draw for young designers. The kind of "brain drain" Cuffaro's departure represented often leads local policy makers to wring their hands in despair. However, Cuffaro believes it is good for his students to leave the area after graduation – at least, as he did, temporarily. Leaving the area exposes students to different ideas and practices, while allowing companies across the country to experience the quality of talent coming out of Northeast Ohio. Leaving the area also reveals to young professionals the many positive attributes of Northeast Ohio and gives them a feeling they can come

back to make a difference. Cuffaro's decision to leave a dream job in Boston and return to Northeast Ohio in 2003 was partly driven by a desire to be closer to family – but he also saw the potential to be a champion for change.

Edward W. “Ned” Hill, Dean of Cleveland State University's Levin College of Urban Affairs, describes Cuffaro's return to Northeast Ohio as a “whirlwind.” “He instantly made connections all over the place, reconnecting the design program at CIA to the economy,” says Hill, who has been partnering with Cuffaro for years to create and brand a “District of Design” in downtown Cleveland. “It was terrific.”

Hill considers Cuffaro to be “walking in the footsteps” of Schreckengost. “Dan is a catalytic connecting presence in Northeast Ohio's industrial design community. He connects art to products through design. He connects students to employers. He is a constant connection between the worlds of art and of commerce. Dan has a vision of using design as a source of competitive advantage and a vehicle for strengthening Northeast Ohio's industrial base.”

As Cuffaro started making such connections, two observations stood out: Changes in technology and processes were continuing to erode the region's traditional industrial might, and the traditional drafting tables his students were using had become obsolete. From the start, he saw a need for more collaboration, greater flexibility, and dynamic thinking – both among his students and among regional stakeholders.

“It was really appealing to come back to Cleveland from Boston because it felt like you could be engaged and your engagement would make a difference,” said Cuffaro. “I see students look at it the same way. What they would really like is to be a part of something bigger, be part of shaping the culture . . . In Cleveland, because the region is seen as being so far down, there is a perception that there is something to fix and something for one to do and an avenue to do it.” One way Cuffaro would begin to make a difference is by shifting the conversation around product development towards design.

think[box]

Still in its infancy, think[box], a new endeavor spearheaded by Case Western Reserve University (CWRU), is an open resource invention center where design, development, and product commercialization collide. This high-technology design laboratory, located on CWRU's campus, invites visitors to merge science and technology with art and design in new and creative ways. Since CWRU is only a few blocks away from the Cleveland Institute of Art, it was logical for science and design to come together here. Students, faculty, staff, and community members design and create prototypes that could one day lead to commercially produced products. Not only does this process allow them to create rapid-prototype products, but also allows for synergies amongst people and institutions; what CWRU terms “cross-discipline and cross-institution collaboration.”

think[box] currently resides in a temporary space that offers access to equipment like circuit board printers, computer-controlled table routers that can cut sheets of wood or plastic, and a 3D printer that can create plastic pieces with moving parts. With fundraising in progress, the university envisions moving the venture into a state-of-the-art open source facility to be housed in a new \$25 million, seven-story, 50,000 square foot complex. The immense size of the future think[box] facility would make it the largest campus-based invention center in the world.

Website: <http://engineering.case.edu/thinkbox/>

Design-Focused Development

Cuffaro describes Cleveland's brand of industrial design as pragmatic, solution-based, and business-minded. While all are admirable qualities, the region's emphasis on practical problem solving tends to

include factors other than design. For example, accountants may say a product embodies the right cost compromise, or an engineer may say a product adequately meets structural specifications. Companies also tend to make decisions about where to locate their business based on price factors, such as square footage, labor, and utility costs. Cuffaro says it's hard to get companies to break out of the cost-focused way of thinking about products and see how "the art, the beauty, the function, and the innovation" adds value. This often relegates design to "second-class status" behind cost and practicality, an obstacle Cuffaro points to as a key "problem with design in Cleveland."

To combat this paradigm, Cuffaro uses design-driven product development, what he describes as "a different way of thinking about products than how accountants or engineers think about them. It's a way of thinking about what products should be like, about the way people interface, how they touch it, how they feel it. Organizations need to think about product design as a business strategy." Pointing to his perception of a lack of enthusiasm towards design, Cuffaro notes that "Industrial design needs to be celebrated more. It needs to be seen as sexier." Cuffaro envisioned a fundamental shift in this perception that would begin with the creation of a new kind of workstation called the Hive.

Reclaiming History

In 2009, the Cleveland Foundation approached Dan Cuffaro and CIA in order to get him and his students involved in brainstorming potential products that used deconstructed materials. The impetus for this work was a study the Foundation commissioned investigating whether a market for recycled wood salvaged from abandoned homes could be developed in Cleveland.

"What we found was you really needed to build more products and demand for these kinds of efforts to be able to have some value," says Lillian Kuri, the Cleveland Foundation's program director for architecture, urban design, and sustainable development. "If there was more demand from people wanting products using these kinds of deconstructed products that would help bring down the cost of deconstruction to be more in line with demolition."

Cuffaro's mind instantly turned to the designs for a modern workstation he had begun mulling years earlier. The design, called the Hive, has a hexagonal design that is modular yet customizable. The 7-foot-long work surface is at an "interaction height," meaning the desk can be comfortably used whether sitting or standing, while its wheels allow for easy reconfiguration or storage. "The desk is a structure that enables collaboration and innovative thinking," Cuffaro says. "There are times in the creative process when it is important to interact and collaborate and then there are times when you need to focus . . . We're trying to create workspace that is more like we work. More collaboration, more flexibility."

In 2012, Cuffaro launched a business venture, Abeo Design, to develop his Hive workstation and other commercial furniture products "made in a sustainable manner." The company website describes the venture as "born from the convergence of social and practical need." To help build connections, the Cleveland Foundation soon introduced Cuffaro to the founders of A Piece of Cleveland (APOC), who in their self-described efforts to be "superheroes" attempted to preserve some value of Cleveland's abandoned homes by championing deconstruction. The matchmaking effort was successful. Cuffaro works with APOC to supply materials for the desks while production is contracted to Benchmark, a Seville, Ohio, fabricator that produces the workstations to his specifications. In the end, about 60 percent of the materials used to produce each Hive have been locally reclaimed through deconstruction – a process Kuri describes as "taking lemons and making lemonade."

Cuffaro puts it in more quantifiable terms: His Hives converted roughly \$24,000 in waste into about \$130,000 in value in just one order. That kind of payoff holds tremendous promise in Cuyahoga County, where an estimated 10,000 to 12,000 structures are candidates for demolition. Demolishing a house in Cuyahoga County typically costs about \$8,000 and generates nothing but waste. Deconstructing a house, however, costs about \$12,000 but salvages building materials that have value and can be reused.

A Piece of Cleveland

Deconstruction, an alternative to the more common demolition, creates an opportunity to reduce waste by recycling 40% of a building's materials while preserving its history. That is the aim of Chris Kious, owner of A Piece of Cleveland (APOC), a company that specializes in deconstructing houses in Northeast Ohio to turn them into everyday household items. APOC was launched in 2008 as a response to the foreclosure crisis that left over 27,000 vacant houses and properties in Cuyahoga County, 12,000 of which were in the City of Cleveland. APOC's goal was to "upcycle" the materials from these homes that would have been destined for the landfill.

Since its founding, APOC has deconstructed over 63 homes and 5 commercial properties, reusing the materials to make a wide variety of products. Salvaged beams, joists, floorboards, and more are recycled and crafted into chairs, tables, countertops, benches, cutting boards, and a litany of other products. Restaurants like Pura Vida, The Wine Spot, Mitchell's, and Eddie Cerino's, have used APOC products, as well as Key Bank and the Cleveland Sight Center. To acknowledge the original source of these materials, each APOC product comes with a "rebirth" certificate, providing customers with the address and construction date of the source building.

Although many companies have bought into the APOC brand, deconstruction as an industry has yet to take off in Cleveland. This lag in its popularity can largely be attributed to cost differential: deconstruction costs \$12,000 while demolition only costs \$8,000. Nonetheless, Kious argues that deconstruction can do more for the economy and the environment than demolishment because it creates jobs and stops materials from entering the landfill. The ultimate goal is to create a whole new industry in Cleveland based on the idea that deconstruction, and the end products that stem from it, is not available in larger cities like New York, positioning Cleveland as a potential leader in urban revitalization that could benefit other metropolises, like Detroit. To aid APOC in this effort, above and beyond its initial start-up funding from the Cleveland Foundation, the Cleveland Institute of Art has contracted APOC for the source material for their new HIVE desks. The hopes are that this effort will help the company scale-up to meet the needs of larger clients, making deconstruction a viable business model for the region.

Website: <http://apieceofcleveland.com/>

From Design to Delivery

Cuffaro hopes the striking honeycomb structure of his Hive workstation will also demonstrate the power of design to drive purchasing. "The desk is a great example for showing students how to go about the process of developing new products," Cuffaro says. All inquiries so far have been 'This is gorgeous; How do I get it?' not, 'This meets my needs.' This meets their needs and it's beautiful and inspiring. I want students to see that process."

Within the first year of business, Cuffaro's workstation has generated about \$500,000 in sales and has inspired him to begin development on four more products. He has fielded inquiries from Georgia, Iowa, California and Ontario, Canada – despite no actual marketing of his product. According to Cuffaro, CIA committed to an initial order of 32 Hive workstations, enough to test-drive the process, debug the product, and make necessary changes. At a cost of about \$6,000, Cuffaro says the Hives were only slightly more than the cost of comparable mass-produced workstations. "CIA spent what it would have if it had bought workstations already available off the shelf." Since that initial order, CIA has ordered an additional 98 desks, made of reclaimed wood from 10 houses destined for demolition.

Also essential in the early stages was the support of the Cleveland Foundation, which provided grants to fund prototyping and other development efforts. The Foundation, working with the anchoring institutions of University Circle to better leverage their purchasing power, also agreed to provide CIA with money to cover the gap between the cost of buying off-the-shelf desks and the cost of creating Hive workstations.

Kuri says the Cleveland Foundation's investment in the entire project has been less than \$75,000, an amount she called a "no-brainer" for an activity that has built a model of collaboration. "It means so much more and has so much potential, I think, for Cleveland." She also believes the collaboration that took place around the workstation – both figuratively and literally – may serve as a model for future projects. "It potentially could be something that really puts Cleveland on the map," she says. "This is absolutely practical." Yet collaborative efforts like these also symbolize Cleveland's potential for resilience and innovation by fostering its design community.

Designing a New Regional Economy

Cuffaro believes design can address another problem the region faces through the repurposing of regional assets: Northeast Ohio has a problem attracting young talent, but the region has existing assets in the form of a robust and ingrained design culture, business clout, and available retail space. These distinct strengths have yet to be deployed in a way that builds excitement and momentum for our region, Cuffaro says.

To meet this need for talent, Cuffaro and Hill's District of Design concept attempts to repopulate a downtown corridor through design activities and affordable studios for young artists. "The thought behind the District of Design was, if we can just get enough of a foothold, a demonstrated concentration of creative thinkers, Cleveland would be better positioned to attract both innovators and the businesses who seek them," Cuffaro says. In creating the

District of Design, he and Hill "essentially randomly assigned borders between CSU and Playhouse Square [two anchor institutions in downtown Cleveland]." Upon further investigation, they discovered dozens of design-related activities were already taking place in the geographic target area, employing

Praxis Integrated Fiber Workshop

Teaming up with the Cleveland Institute of Art, the Waterloo Arts and Entertainment district developed PRAXIS, an Integrated Fiber Workshop. Examples of fiber artists include dyers, felters, knitters, spinners, weavers, and rug hookers. The Praxis program debuted at the 2013 Waterloo Arts Fest, and the permanent co-op workshop is located across from the Slovenian Workmen's Home in the Waterloo Studios. The workshop serves the community and also provides gallery and studio space to artists and other community members who have an interest in fiber art. Beyond teaching artists and community members how to use a loom, PRAXIS also plans to assist attendees in weaving a community textile that to be displayed at the next Arts Fest.

Website: <http://artscollinwood.org/arts-fest-2013/arts-alive/>

some 1,300 workers, along Euclid Avenue and adjoining streets between East 14th and East 22nd Streets. “Within these random boundaries, a foothold [of design] was already there,” Cuffaro says. “Yet the neighborhood didn’t have an identity of being a design neighborhood.”

Creating a design designation for the neighborhood is more than simple branding. “When you have a[n] [economic] cluster, the sum is greater than the total of its parts,” he says. “The interaction effect is supersized compared to the resources. In Cleveland, it looks like we have all these parts, but they’re not working right to supercharge the interaction. It’s not advancing our cause. I don’t really know why. But, if we can get it to behave like a cluster, then that builds momentum.” A design cluster, however, is not simply about supporting existing products; it is also about creating an environment for innovation to take place. A cluster enables “conversations that inspire new ways of doing things,” Cuffaro says.

Deming also praises Cuffaro’s work in developing the District of Design, building on the region’s existing assets and its “maker culture” legacy as a manufacturing hub. Today, “maker culture’s” contemporary meaning refers to a broader and growing movement that celebrates do-it-yourself tinkerers who use experimentation, hands-on learning, and peer-to-peer interactions to create novel products that solve perceived problems experienced in everyday life.¹⁵⁹ Deming believes Northeast Ohio can provide a fertile ground for such informal, creative exchanges. “If you can develop a place that seems to be a magnet for like-minded [innovative] people, they may work for different firms but get together over coffee and talk. All sorts of new products and ideas come out of that.” Such creative exchanges are critical in developing new products, which, in turn, should help create new jobs. The challenge, Cuffaro says, is getting businesses – and the region overall – to be open to designs’ contributions.

¹⁵⁹ Mike Sharples, Patrick McAndrew, Martin Weller, Rebecca Ferguson, Elizabeth FitzGerald, Tony Hirst, Mark Gaved. “Exploring new forms of teaching, learning and assessment, to guide educators and policy makers.” Open University Innovation Report 2. Innovating Pedagogy 2013.
http://www.open.ac.uk/personalpages/mike.sharples/Reports/Innovating_Pedagogy_report_2013.pdf and
<http://makezine.com/>

CLEVELAND CYCLEWERKS: STARTING UP

Scott Colosimo of Cleveland CycleWerks has a vision: design and manufacture custom-made motorcycles in Cleveland. However, Colosimo encountered a number of roadblocks that required him to rethink his business strategy and confront the realities of the globalized economy. In finding his way, Colosimo has received considerable criticism as well as accolades – all in pursuit of making his dreams into reality.

Today, economic competitiveness is predicated on a locality's ability to not only create, but also apply knowledge. The manufacture of such knowledge occurs through investments in research and development, an entrepreneurial business culture, and public policies geared at bringing ideas to fruition.¹⁶⁰ For formally industrial cities, this proposition remains challenging – how does a place whose legacy is tied to a production-based economy adapt to a knowledge-based model?¹⁶¹

In Cleveland, the story of Cleveland CycleWerks illustrates the challenges a startup can face when transforming an idea to scale – progressing through prototyping a product and demonstrating its market viability – while developing a local manufacturing infrastructure for it.

Becoming a Niche Manufacturer

Scott Colosimo sits glued to a laptop in his office. The room's tight quarters, lack of windows, and floor-to-ceiling industrial yellow brick are more suggestive of a closet than a corporate office. Yet, the head-to-toe black leather suit hanging in the corner and the Brembo brake caliper sitting on his desk make clear that Colosimo, 32, is serious about his plan to build small-engine motorcycles that are both fun to ride and easy on the wallet – and to manufacture them in Cleveland.

Colosimo's preoccupation with the laptop demonstrates the zoom and crash challenges of building a business: Cleveland CycleWerks had been unexpectedly featured on Cycle World's website, the nation's largest motorcycle magazine, in a late June 2013 review of ten bikes with "soul & character." Colosimo's Misfit garnered high marks in Cycle World's review and was deemed very affordable due to its standard \$3,195 price tag. The bike's affordability and accessibility reflect what Colosimo calls the "Cleveland way," encapsulating the values that encouraged him to return to Northeast Ohio.

The favorable magazine review led to a surge of activity on Cleveland CycleWerks' website, such that the site became overwhelmed and its server went offline. This is why Colosimo is now holed up in his office, hunched over his laptop, and operating on only a couple hours of sleep. In a small, startup business, it is not enough to be the visionary; you have to be a jack-of-all-trades – website management included. The 150,000 hits were both exciting and overwhelming for a 4-year-old company that expects to sell only 12,000 to 14,000 motorcycles in 2013. To put those numbers in perspective, Honda reported worldwide motorcycle sales of 12.6 million in 2012. "We're still a very niche manufacturer," Colosimo says.

¹⁶⁰ West, D. M. (2011). Technology and the innovation economy. *Center for Technology Innovation at Brookings*. <http://www.brookings.edu/research/papers/2011/10/19-technology-innovation-west>

¹⁶¹ Berger, S. & Sharp, P. et al. (2013) A preview of the MIT production in the innovation economy report. *MIT Taskforce on Innovation and Production*. <http://web.mit.edu/press/images/documents/pie-report.pdf>

The Misfit is one of three models Colosimo sells in the United States; he also produces a few other models specifically designed for markets outside of the country. CycleWerks bikes come with stylish, classic lines and 125 or 250 cc engines. (By comparison, the engine displacement for Harley-Davidson motorcycles may be 1500 cc or more.) Colosimo, who began customizing cars and motorcycles as a teenager in his parents' garage in Parma, was working as a product designer in Europe when he got to experience the unexpected fun of riding a small-engine bike. He cites a biking adage: "It's fun to ride a slow bike fast." CycleWerks' demographic niche in the United States includes first-time bikers, particularly women, and serious riders who want a "step-down" bike for everyday use. "The average rider can't get to one-tenth of the level" larger bikes are meant to be ridden, Colosimo says. For local commutes to and from work in traffic, a small-engine bike is more practical, easier to handle, easier on the environment, and easier on the wallet (Colosimo's bikes get almost 100 miles per gallon). Colosimo says "Every bike is created for a purpose."

Yet utility need not sacrifice panache. Colosimo says his motorcycles have been heavily influenced by classic styles. "Retro-futuristic" is what some reviewers have dubbed them. "From 50 feet away, our bike looks like an old bike," Colosimo says. "Then when you get up on it, you see that it's not an old bike. It's a truly modern bike."

Nottingham Spirk

In 1972, two recent graduates from the Cleveland Institute of Art, John Nottingham and John Spirk, founded their own industrial design firm in Cleveland's University Circle neighborhood. Forty-one years later, the company now has around/close to 1,000 U.S. and international patents, including the Spin Brush toothbrush, Swiffer Sweeper SuperVac, and the Sherwin Williams Twist-n-Pour paint can. These successes are attributable to the firm's ability to work effectively with client companies by reviewing their off-the-shelf products, guiding design improvements, and, finally, ensuring that the redesigned products can be sold at a reasonable price.

Nottingham Spirk transforms products through their signature designs, but has also successfully engaged with its clients in new product development and product innovation. A classic example is their work with Zippo Manufacturing Co., the lighter manufacturer. As many states passed tougher tobacco laws and lighters were banned on airlines, Zippo was finding that lighters were becoming harder to sell. Like all companies, Zippo realized they had to evolve, so they invited Nottingham Spirk to take a look at their facilities and help them brainstorm ideas for new products. Through this exercise, Nottingham Spirk helped create a diverse product line that now includes camping gear, watches, and writing supplies, all of which successfully supplemented Zippo's core product.

Helping other companies vertically integrate is nothing new for Nottingham Spirk, which has its own "vertical innovation process." The company's process enables Nottingham to create the design, prototyping, and supply chain management in-house. Consequently, Nottingham Spirk creates tangible products that are tested by the company's own focus groups. This process speeds up the design work, and those savings are passed on to the client and, ultimately, the consumers. When the company was looking for a new facility in the early 2000s they wanted to remain in University Circle, so in 2005 they spent \$16 million rehabbing the historic First Church of Christ Scientist. Built in 1931 and modeled on the Pantheon in Rome, the building now houses their offices, industrial design studio, and prototype manufacturing center.

Website: <http://www.nottinghamspirk.com/>

Retro-futuristic is a term “many designers love to use,” Colosimo says. But “others say it’s a cop-out: You’re copying old stuff. As a business person, it’s a perfect place for us to live. It’s helping us build our brand.” By building bikes that look and feel “classic” to riders, Colosimo believes it is making the sales pitch is less difficult, a crucial factor for a startup company like his.

Local Draws

Colosimo launched Cleveland CycleWerks in 2009, but in many ways he worked toward this moment since childhood. He can remember the day when his grandfather Richard Colosimo, a successful Northeast Ohio artist and businessman, suggested they stop by the Cleveland Institute of Art (CIA). That afternoon, they walked past figure drawings and medical sketches; then, down in the basement, he got a glimpse of his future: There were “all these drawings of future cars – George Jetson stuff. The quality of the work, I couldn’t believe it. It was a defining moment. It was like seeing a masterpiece. From that moment, that’s what I wanted to do.”

“It put two things I really loved together,” Colosimo says. “Art – and cars and bikes . . . I didn’t realize that people actually had a career doing that.” Colosimo knew he loved art and product design at an early age, but it took years before he learned he loved Cleveland. “I hated this place when I was a kid. Too small town. Too blue-collar.”

After graduating from CIA in 2004 with a degree in industrial design, Colosimo left Northeast Ohio. Design jobs took him to various parts of the nation and world. Yet no matter where he went, they all seemed lacking when compared to his hometown of Cleveland. “I’ve lived in so many places. Cleveland has a unique quality.” That “unique quality” is what led him to include “Cleveland” in the name of his business. “For me, there was no other name for the company. It conveyed something to me. If it meant something to me, then I assumed it would mean something to others.” For Colosimo, Cleveland and its “maker culture” convey character and competence.

Beyond simply capturing the image of the city in his company’s name, he wanted to capture the strengths of its people. When he lived in other cities, “it was frustrating that no one does anything for themselves,” he says. In Cleveland, “we were able to hire good people – people who can actually do things. They can work with computers and their hands.”

Setting up business in Cleveland came with another perk: “One thing that cannot be overstated is that you can live and operate a business in Cleveland for relatively little [money],” Colosimo says. That relatively slow “burn rate” was important when he found his embrace of Cleveland wasn’t immediately returned.

Overcoming Roadblocks

Manufacturing motorcycles locally has proven much more challenging than Colosimo initially anticipated. For starters, the worst economic crisis since the Great Depression was still weighing heavily on the regional – and national – economy. In addition to economic conditions, Colosimo faced challenges in building a supply chain for his bikes in Cleveland. Local manufacturers were unwilling to take a chance on a young startup company wanting to buy parts in small batches. Many of the vendors were also deterred by the potential liability of supplying parts for motorcycles. Manufacturers and potential investors alike told him his venture was too risky.

Unwilling to give up on his vision, Colosimo did what countless other startups do to survive: He looked overseas. “In China, I can get anything built. I can go in with a hand drawing and there will be five or six factories wanting to do it,” he says. “The support system in China was much better.” For example, the Chinese government offered a rebate on every part they produced for him. Not surprisingly, manufacturers came to him, hoping to earn his business. Along with being the biggest market for motorcycles, such aggressive pursuit of manufacturing opportunities has helped China become the world’s leading motorcycle producer. According to Cycle World magazine, more than half of all motorcycles are manufactured in China – and have been for years.

The decision to go overseas has not been without controversy. Colosimo has drawn criticism from those who advocate for “Made in the U.S.A.” products and for stronger environmental and industrial regulations in China. The lack of regulations makes the cost of doing business in China much cheaper in terms of dollars and cents. However, the environmental and human costs are much greater – negative consequences such as unchecked pollution, poor labor conditions, worker abuses, and subpar product quality are commonly cited critiques of China.

Blazing Saddle

According to the nonprofit advocacy group Bike Cleveland, commuting to work by bicycle has increased 280% from 2000 to 2010.¹ Capitalizing on the emergence of Cleveland’s cycling culture, two friends, James Rychak and Travis Peeples, opened Blazing Saddles Cycle in Cleveland’s Detroit-Shoreway neighborhood in 2011. The two friends set up in a small storefront on Detroit Avenue and ran their early business as a backdoor custom bicycle shop. As the business grew, a niche market soon became apparent, so Rychak and Peeples decided the time was right to progress to a full cycle shop.

Nonetheless, Blazing Saddle isn’t your ordinary cycle shop. For example, most of their bikes are made of steel, a nod to commuters that rely on a steel frame’s toughness to handle the stress of the road. Bikes in other shops are often made out of aluminum or carbon fiber, a material meant to be lighter for improved speed but not well-suited for the often strenuous roads that commuters face. Though initially conceived of as a custom shop, Blazing Saddle’s overall mission is to put the right bike into the hands of the right cyclist. This mantra seems to be working; more than two years later they have grown so much that they relocated to a 100-year-old ex-hardware store on Detroit Avenue near Lake Avenue – the ceiling now adorned with bicycles instead of hammers.

Website: <http://blazingsaddlecleveland.com/>

Colosimo understands the criticisms but points out “manufacturing is a global affair . . . whether cars or clothing, it’s a coming together of pieces and parts from all over the world and all over the country.” Research also shows that in a globalized economy, industry development often follows such a course, with greater outsourcing taking place in the early stages of development.¹⁶² For proprietors of startups, such tradeoffs are often viewed as necessary in finding a balance between the founder’s vision and the realities of business.

Colosimo maintains, “From the beginning, I wanted to do everything in the United States. But it’s very, very difficult to work in the U.S. Regulation, cost, and mindset gets in the way of producing things here, when you’re trying to do things like I envisioned for Cleveland CycleWerks.”

¹⁶² Dickens, P. (2003). *Global shift: Reshaping the global economic map in the 21st century*. Sage Publications

Bringing Business Home

So far, the number of Clevelanders working at Cleveland CycleWerks is admittedly small – about eight full-time employees out of 250 total workers. The Cleveland workers are largely operational and design staff.

Nevertheless, Colosimo is committed to bringing production of his motorcycles to Cleveland. He believes Cleveland's heritage of designing and manufacturing products adds value, both in terms of process and perception. This conviction led him to take up residence in a 65,000-square-foot, century-old manufacturing building just north of Cleveland's Gordon Square Arts District. Over the years, the building has been home to rubber production, steelmaking, and meat-processing activities. Colosimo values the building's history, character and location, which, despite the artsier focus of late, continues to be home to manufacturing activity. Within a few blocks of his company, there are businesses engaged in casting, finishing, welding, coating, and hard chrome plating. As Colosimo succinctly puts it, "They cut steel next door."

By the time he's finished with renovations, Colosimo will have invested \$5.5 million in the facility. Cleveland City Councilman Matt Zone helped him qualify for partial tax abatement for the property, which had sat vacant for about 18 months. The building is more space than Colosimo envisions for his Cleveland operations, so he is hoping to attract other entrepreneurs and innovators into a shared environment of production. "We're trying to rent out space to artists and businesses doing interesting things." He believes the investment in and energy around Gordon Square should help attract workers, renters and customers.

"Our decision to be here was that it was an up-and-coming neighborhood," Colosimo says. "We're a destination retail establishment." His shop not only sells CycleWerks bikes and accessories, but also specializes in repairing certain brands of vintage motorcycles. "We already have [customers] coming in from around the world. We want them to be able to park. We want them to be able to go to restaurants."

His goal remains to bring assembly of his motorcycles to Cleveland. But the process has been frustratingly slow. He had hoped to be up and running by now. In the near future, he expects to bring limited assembly to Cleveland, employing 12 local workers, mostly part-time to start. In addition, he hopes to bring cutting, welding, casting, and machining activities to Cleveland, noting that he already sources about 60 parts locally.

"It's going to be a balance," he says. "Manufacturing isn't everything; manufacturing is something . . . The jobs I want to employ people in full-time are creative – designers, engineers." He says the value proposition is in creating new products and developing new ideas. "I do love manufacturing. But the fact about manufacturing is it's a cost-driven society. The real value is in creativity . . . the IP [intellectual property], the design, the engineering, that's what we do here in Cleveland."

CHAPTER 9

INDIVIDUAL ARTISTS AND VACD ORGANIZATION DIRECTORIES

Three directories were comprised; an artists' directory; an arts organizations directory; and a galleries, shops, and studios directory. The arts organizations directory had a total of 73 institutions. These companies were found through Internet searches, and grantee lists from the Cleveland Foundation, and Cuyahoga Arts & Culture. The arts organizations were also searched in three public databases: Hoover's, Guidestar, and Lexis Nexis.¹⁶³

The galleries and shops directory had a total of 101 companies. These companies were found through Internet searches, artist websites, the *Plain Dealer*, *Cleveland Scene Magazine*, and social media websites like Facebook, Tumblr, and CoolCleveland.com. Galleries and shops were also found through initial interviews, focus groups, and leads from CPAC. The final list consists of 23 shops, 15 studios, 61 art galleries, and 2 auction houses.

The directory of artists was populated through databases and popular networking sources, including: Etsy, Facebook, Tumblr, Cleveland Scene Magazine, Cleveland.com, CoolCleveland.com and others. Leads from CPAC, the initial interviews, and survey responses were also added. This directory was then defined in terms of artistic mediums. The mediums include wood, glass, metal, paper, crafts, design, plastic, ceramics, jewelry, drawing, painting, sculpture, photography, printmaking, mixed media, fiber/textiles, digital/electronic, and a general "visual" designation. In total, the directory had 757 artists, 134 in Mixed Media, 119 in Visual, 109 in Painting, 79 in Photography, and 74 in Design.

All three directories are provided to give the reader a sense of the scope and scale of the Cleveland Visual Arts, Craft and Design (VACD) sector. They are not intended to be all inclusive of all arts organizations, arts-related establishments, or artists that exist in the Cleveland VACD Sector. All-inclusive directories were not achievable given available data and the limitations of the research. All three directories are located in Appendix A.20-A.22.

¹⁶³ Of the 73 organizations in the directory, 55 were found through Guidestar, 40 were found in Hoover's, and 40 were found in Lexis Nexis. Thirty-four were found in Lexis Nexis and Hoover's, 38 were found in Lexis Nexis and Guidestar, 39 were found in Hoover's and Guidestar, and 33 were found in Lexis Nexis, Hoover's, and Guidestar.

APPENDIX

Appendix A.1: Defining the Industry

Phase 1.

We identified Visual Arts, Craft and Design (VACD)-related industries through a literature review of previous studies¹⁶⁴ (Appendix Table A.1) and retrieved these industries' data from the ES202 database.¹⁶⁵ Out of our list of 109 identified industries (Appendix Table A.2) and conceptualized VACD sector structure with CPAC (Appendix Table A.3), we created three groups of industries based on their relationship to Cuyahoga County's VACD sector. The first group of industries was created using *primary* visual art NAICS. The primary NAICS code identifies sectors where all establishments belong to the VACD sector because they clearly consist of VACD businesses. For example, every establishment with the NAICS code 453920 "Art Dealers" was included in the database for the trend analysis.

As a next step, we identified *conditional* NAICS, which points to the industries that contain both VACD-related and non-VACD-related establishments. Each establishment in these industries was individually examined and a decision was made regarding whether or not it belonged to the VACD sector and if it should be included in the VACD industry analysis database. For example, all establishments within NAICS 712110 "Museums" were individually examined and only VACD-relevant museums were included in the database for this analysis.

Finally, all NAICS codes gathered from the review of previous studies were not included in the VACD industry analysis database because these industries were either not related to the VACD sector or they represented industries that do not exist in Cuyahoga County.

Phase 2.

Within the next phase, we created a list of keywords that contain characteristics of the VACD sector (Appendix Table A.4). As a next step, we searched for these key words in companies' names through the ES202 database. This approach allowed us to include additional companies that relate to the VACD sector, but which are classified under non-VACD-related NAICS [codes?] in the database. Search results were then reviewed and compared with their individual websites to confirm their VACD sector affiliation. Next, each company was divided into one of two categories: (1) a non-visual arts establishment, and therefore not included in the final dataset for this analysis; (2) a visual arts establishment then assigned a *secondary* NAICS code. The secondary NAICS code was either a *primary* or *conditional* NAICS code, as determined by the definition described in Phase 1.

Phase 3.

¹⁶⁴ Previous research includes the following studies: The State of Colorado's Creative Economy, Alliance for Creative Advantage, Regional Technology Strategies and Mt Auburn Associates, Inc. (2008); Art & Economic Prosperity: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences; National Report (2005); Creative Vitality Index Study: The State of California and Ten CVI Regions for 2006 and 2007, WESTAF (2009); Timothy S. Cole, Economist, North Carolina Department of Commerce, Policy, Research, & Strategic Planning Division (2009); Art & Economic Prosperity: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences; North Dakota Report. *Americans for the Arts* (2010); Arts as an Industry: Their economic impact on New York City and New York State. By Alliance for the Arts (2007); The Economic Impact of The Arts on New York City and New York State: By Alliance for the Arts (1997); Ohio's Arts: A Foundation of Innovation, Creativity and Economic Strength by Center for Regional Development at Bowling Green State University (2009); Arts & Economic Prosperity VI – National Report (2010); North Carolina Craft Industry (2008); Northwest Wisconsin Craftpersons (2006); Arts as an Industry: their impact on New York City & State (2007).

¹⁶⁵ For more information about NAICS (North American Industry Classification System); visit <http://www.census.gov/eos/www/naics/>.

To create comparable data at the state and national level, several techniques were applied to the ES202 database. All establishments considered primary NAICS were included in both Ohio and the U.S. databases.

Economic indicators of establishments within conditional NAICS industries were treated differently depending on the companies' 2012 employment numbers. Every establishment with employment over 50 employees in the remainder of Ohio in 2012 was individually reviewed. The research team made a decision whether to include an establishment into the VACD sector based on comparison with establishment's website. The decision was made with 2012 data and then was applied to all years of the analysis.

Due to the large employment numbers in NAICS 325992 establishments- Photographic Film, Paper, Plate, and Chemical Manufacturing—all NAICS establishments were individually checked and evaluated. For establishments with fewer than 50 employees in other NAICS sectors in 2012, we applied the ratio of VACD-related versus non-VACD-related establishments based on Cuyahoga County data. For example, if there were 100 establishments with fewer than 50 employees in a NAICS industry, only 40% of these establishments were considered VACD-related. The ratio of 40% was the same ratio of VACD-related establishments with fewer than 50 employees in the same NAICS industry in Cuyahoga County, were all establishments were individually reviewed. The same rule was applied to all establishments in NAICS 327991 – Cut Stone and Stone Product Manufacturing, NAICS 332323 – Ornamental and Architectural Metal Work Manufacturing, and NAICS 519120 – Libraries and Archives that had very small employment and number of establishments overall. Establishments in non-VACD sectors in the remainder of Ohio were assigned a secondary VACD NAICS code and were added to the Ohio VACD database. The U.S. conditional NAICS industries' establishments were assigned to the VACD data based on the proportions of the Cuyahoga and Ohio establishments.

Appendix Table A.2: NAICS Codes used in Literature Review

NAICS Code	NAICS Description	Source
Group 1: Cultural Goods Production		
323110	Commercial Lithographic Printing	CEWEB
323111	Commercial Gravure Printing	CEWEB
323112	Commercial Flexographic Printing	CEWEB
323113	Commercial Screen Printing	CEWEB
323115	Digital Printing	CEWEB
323117	Books Printing	CEWEB
323119	Other Commercial Printing	CEWEB
323121	Trade binding and Related Work	CEWEB
323122	Prepress Services	CEWEB
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing	CEWEB
327112	Vitreous China, Fine Earthenware, and Other Pottery Product Manufacturing	CEWEB
327212	Other Pressed and Blown Glass and Glassware Manufacturing	CEWEB
332323	Ornamental and Architectural Metal Work Manufacturing	CEWEB
327420	Gypsum Product Manufacturing	Colorado CE
327991	Cut stone and stone product manufacturing	Colorado CE
327999	Misc. nonmetallic mineral products	Colorado CE
332323	Ornamental & architectural metal work mfg.	Colorado CE
333293	Printing Machinery and Equipment Manufacturing	CEWEB
333315	Photographic and photocopying equip mfg.	Colorado CE
334220	Broadcast and wireless comm. Equip.	Colorado CE
334310	Audio and Video Equipment Manufacturing	CEWEB
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing	CEWEB
334613	Magnetic and optical recording media mfg.	Colorado CE
336612	Boat building	Colorado CE
337212	Custom Architectural Woodwork and Millwork Manufacturing	CEWEB
339911	Jewelry (except Costume) Manufacturing	CEWEB
339912	Silverware and Hollowware Manufacturing	CEWEB
339913	Jewelers' Material and Lapidary Work Manufacturing	CEWEB
339914	Costume Jewelry and Novelty Manufacturing	CEWEB
339942	Lead Pencil and Art Good Manufacturing	CEWEB
339992	Musical Instrument Manufacturing	CEWEB

Group 2: Cultural Goods Distribution		
423410	Photographic Equipment and Supplies Merchant Wholesalers	CEWEB
423620	Electric appliance merchant wholesalers	Colorado CE
423920	Toy & hobby goods merchant wholesalers	Colorado CE
423940	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers	CEWEB
423990	All other durable goods merchant wholesalers	Colorado CE
424110	Printing and Writing Paper Merchant Wholesalers	CEWEB
424920	Book, Periodical, and Newspaper Merchant Wholesalers	CEWEB
443112	Radio, Television, and Other Electronics Stores	CEWEB
443130	Camera and Photographic Supplies Stores	CEWEB
448310	Jewelry Stores	CEWEB
451120	Hobby, toy, and game stores	Colorado CE
451130	Sewing, Needlework, and Piece Goods Stores	CEWEB
451140	Musical Instrument and Supplies Stores	CEWEB
451211	Book Stores	CEWEB
451212	News dealers and newsstands	Colorado CE
451220	Prerecorded Tape, Compact Disc, and Record Stores	CEWEB
453220	Gift, novelty, and souvenir stores	Colorado CE
453920	Art Dealers	CEWEB
453998	Store retailers not specified elsewhere	Colorado CE
812921	Photofinishing Laboratories (except One-Hour)	CEWEB
812922	One-Hour Photofinishing	CEWEB

Group 3: Intellectual Property Production & Distribution		
511110	Newspaper Publishers	CEWEB
511120	Periodical Publishers	CEWEB
511130	Book Publishers	CEWEB
511191	Greeting Card Publishers	CEWEB
511199	All Other Publishers	CEWEB
511310	Software publishers	Colorado CE
512110	Motion Picture and Video Production	CEWEB
512120	Motion Picture and Video Distribution	CEWEB
512131	Motion Picture Theaters (except Drive-Ins)	CEWEB
512132	Drive-In Motion Picture Theaters	CEWEB
512191	Teleproduction and Other Postproduction Services	CEWEB
512199	Other Motion Picture and Video Industries	CEWEB
512210	Record Production	CEWEB
512220	Integrated Record Production/Distribution	CEWEB
512230	Music Publishers	CEWEB
512240	Sound Recording Studios	CEWEB
512290	Other Sound Recording Industries	CEWEB
515111	Radio Networks	CEWEB
515112	Radio Stations	CEWEB
515120	Television Broadcasting	CEWEB
515210	Cable and Other Subscription Programming	CEWEB
516110	Internet Publishing and Broadcasting	CEWEB
517510	Cable and Other Program Distribution	CEWEB
519110	News Syndicates	CEWEB
519120	Libraries and Archives	CEWEB
532230	Video Tape and Disc Rental	CEWEB
532299	Video tape and disc rental	Colorado CE
541310	Architectural Services	CEWEB
541320	Landscape Architectural Services	CEWEB
541340	Drafting Services	CEWEB
541410	Interior Design Services	CEWEB
541420	Industrial Design Services	CEWEB
541430	Graphic Design Services	CEWEB
541490	Other Specialized Design Services	CEWEB
541810	Advertising Agencies	CEWEB
541820	Public relations agencies	Colorado CE
541830	Media Buying Agencies	CEWEB
541840	Media Representatives	CEWEB
541850	Display Advertising	CEWEB
541860	Direct mail advertising	Colorado CE
541890	Other services related to advertising	Colorado CE
541921	Photography Studios, Portrait	CEWEB
541922	Commercial Photography	CEWEB
611519	Other technical and trade schools	Colorado CE
711110	Theater Companies and Dinner Theaters	CEWEB
711120	Dance Companies	CEWEB
711130	Musical Groups and Artists	CEWEB
711190	Other Performing Arts Companies	CEWEB
711310	Promoters with facilities	Colorado CE

711320	Promoters without facilities	Colorado CE
711410	Agents and managers for public figures	Colorado CE
711510	Independent Artists, Writers, and Performers	CEWEB
Group 4: Educational Services		
611610	Fine Arts Schools	CEWEB
712110	Museums	CEWEB
712120	Historical Sites	CEWEB
712130	Zoos and Botanical Gardens	CEWEB
712190	Nature Parks and Other Similar Institutions	CEWEB

Note:

CEWEB: "Defining the Cultural Economy: Industry and Occupational Approaches", Markusen, Ann; Wassall, Gregory H.; DeNatale, Doug; Cohen, Randy. November, 2006.

Colorado CE: "The State of Colorado's Creative Economy", Alliance for Creative Advantage Regional Technology Strategies and Mt Auburn Associates, Inc. December, 2008.

Appendix Table A.3: NAICS Codes Used in Both Literature Review Studies

NAICS Code	NAICS Description
Group 1 Cultural Goods Production	
323110	Commercial Lithographic Printing
323111	Commercial Gravure Printing
323112	Commercial Flexographic Printing
323113	Commercial Screen Printing
323115	Digital Printing
323117	Books Printing
323119	Other Commercial Printing
323121	Trade binding and Related Work
323122	Prepress Services
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing
327112	Vitreous China, Fine Earthenware, and Other Pottery Product Manufacturing
327212	Other Pressed and Blown Glass and Glassware Manufacturing
332323	Ornamental and Architectural Metal Work Manufacturing
327420*	Gypsum Product Manufacturing
327991*	Cut stone and stone product manufacturing
327999*	Misc. nonmetallic mineral products
332323*	Ornamental & architectural metal work mfg.
333293	Printing Machinery and Equipment Manufacturing
333315*	Photographic and photocopying equip mfg.
334220*	Broadcast and wireless comm. Equip.
334310	Audio and Video Equipment Manufacturing
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing
334613*	Magnetic and optical recording media mfg.
336612*	Boat building
337212	Custom Architectural Woodwork and Millwork Manufacturing
339911	Jewelry (except Costume) Manufacturing
339912	Silverware and Hollowware Manufacturing
339913	Jewelers' Material and Lapidary Work Manufacturing
339914	Costume Jewelry and Novelty Manufacturing
339942	Lead Pencil and Art Good Manufacturing
339992	Musical Instrument Manufacturing

Group 2 Cultural Goods Distribution	
423410	Photographic Equipment and Supplies Merchant Wholesalers
423620*	Electric appliance merchant wholesalers
423920*	Toy & hobby goods merchant wholesalers
423940	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
423990*	All other durable goods merchant wholesalers
424110	Printing and Writing Paper Merchant Wholesalers
424920	Book, Periodical, and Newspaper Merchant Wholesalers
443112	Radio, Television, and Other Electronics Stores
443130	Camera and Photographic Supplies Stores
448310	Jewelry Stores
451120*	Hobby, toy, and game stores
451130	Sewing, Needlework, and Piece Goods Stores
451140	Musical Instrument and Supplies Stores
451211	Book Stores
451212*	News dealers and newsstands
451220	Prerecorded Tape, Compact Disc, and Record Stores
453220*	Gift, novelty, and souvenir stores
453920	Art Dealers
453998*	Store retailers not specified elsewhere
812921	Photofinishing Laboratories (except One-Hour)
812922	One-Hour Photofinishing

Group 3 Intellectual Property Production & Distribution	
511110	Newspaper Publishers
511120	Periodical Publishers
511130	Book Publishers
511191	Greeting Card Publishers
511199	All Other Publishers
511310*	Software publishers
512110	Motion Picture and Video Production
512120	Motion Picture and Video Distribution
512131	Motion Picture Theaters (except Drive-Ins)
512132	Drive-In Motion Picture Theaters
512191	Teleproduction and Other Postproduction Services
512199	Other Motion Picture and Video Industries
512210	Record Production
512220	Integrated Record Production/Distribution
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries
515111	Radio Networks
515112	Radio Stations
515120	Television Broadcasting
515210	Cable and Other Subscription Programming
516110	Internet Publishing and Broadcasting
517510	Cable and Other Program Distribution
519110	News Syndicates
519120	Libraries and Archives
532230	Video Tape and Disc Rental
532299*	Video tape and disc rental
541310	Architectural Services
541320	Landscape Architectural Services
541340	Drafting Services
541410	Interior Design Services
541420	Industrial Design Services
541430	Graphic Design Services
541490	Other Specialized Design Services
541810	Advertising Agencies
541820*	Public relations agencies
541830	Media Buying Agencies
541840	Media Representatives
541850	Display Advertising
541860*	Direct mail advertising
541890*	Other services related to advertising
541921	Photography Studios, Portrait
541922	Commercial Photography
611519*	Other technical and trade schools
711110	Theater Companies and Dinner Theaters
711120	Dance Companies
711130	Musical Groups and Artists
711190	Other Performing Arts Companies
711310*	Promoters with facilities

711320*	Promoters without facilities
711410*	Agents and managers for public figures
711510*	Independent Artists, Writers, and Performers
Group 4 Educational Services	
611610	Fine Arts Schools
712110	Museums
712120	Historical Sites
712130	Zoos and Botanical Gardens
712190	Nature Parks and Other Similar Institutions

* denotes NAICS included in the Colorado CE study, but not CEWEB study.

Appendix Table A.4: Sector Descriptions from CPAC

Craft
Clay
Fiber
Glass
Leather
Metal
Paper
Plastic
Wood
Visual Arts
Computer Art
Drawing
Mixed Media
Painting
Photography
Printmaking
Sculpture
Design
Architecture
Fashion
Game Design
Graphic
Industrial
Interior
Landscape

Appendix Table A.5: VACD Keyword List

Description	
Acrylic	Glassware
Architect	Graphic
Applied Art	Greeting Card
Artist	Interior Design
Brush	Jewelry
Canvas	Knit
Commercial Art	Mural
Craft	Needlework
Creative	Paint
Curator	Palette
Digital	Photo
Design	Print
Drafting	Sculpture
Drawing	Sewing
Easel	Sketch
Engraving	Studio
Etch	Visual
Fine Art	Watercolor
Gallery	

Appendix Table A.6: VACD NAICS Codes by Subsector

NAICS Code	Description	Classification
Printing		
323111	Commercial Printing (except Screen and Books)	Primary
323113	Commercial Screen Printing	Primary
424110	Printing and Writing Paper Merchant Wholesalers	Primary
511191	Greeting Card Publishers	Primary
325910	Printing Ink Manufacturing	Conditional
322230	Stationery Product Manufacturing	Keyword
323120	Support Activities for Printing	Keyword
339950	Sign Manufacturing	Keyword
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	Keyword
425120	Wholesale Trade Agents and Brokers	Keyword
423490	Other Professional Equipment and Supplies Merchant Wholesalers	Keyword
423420	Office Equipment Merchant Wholesalers	Keyword
424120	Stationery and Office Supplies Merchant Wholesalers	Keyword
453210	Office Supplies and Stationery Stores	Keyword
511120	Periodical Publishers	Keyword
323117	Books Printing	Keyword
423840	Industrial Supplies Merchant Wholesalers	Keyword
454111	Electronic Shopping	Keyword
Photography		
423410	Photographic Equipment and Supplies Merchant Wholesalers	Primary
541921	Photography Studios, Portrait	Primary
541922	Commercial Photography	Primary
812921	Photofinishing Laboratories (except One-Hour)	Primary
812922	One-Hour Photofinishing	Primary
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing	Conditional
488510	Freight Transportation Arrangement	Keyword
424690	Other Chemical and Allied Products Merchant Wholesalers	Keyword
443142	Electronics Stores	Keyword
Glass		
327212	Other Pressed and Blown Glass and Glassware Manufacturing	Primary
327215	Glass Product Manufacturing Made of Purchased Glass	Conditional
444190	Other Building Material Dealers	Keyword

Architecture & Design		
541310	Architectural Services	Primary
541320	Landscape Architectural Services	Primary
541340	Drafting Services	Primary
541410	Interior Design Services	Primary
541420	Industrial Design Services	Primary
541430	Graphic Design Services	Primary
541490	Other Specialized Design Services	Primary
236118	Residential Remodelers	Keyword
238352	Finish Carpentry Contractors	Keyword
813920	Professional Organizations	Keyword
561730	Landscaping Services	Keyword
813312	Environment, Conservation and Wildlife Organizations	Keyword
442110	Furniture Stores	Keyword
442210	Floor Covering Stores	Keyword
442291	Window Treatment Stores	Keyword
442299	All Other Home Furnishings Stores	Keyword
445310	Beer, Wine, and Liquor Stores	Keyword
448120	Women's Clothing Stores	Keyword
518210	Data Processing, Hosting, and Related Services	Keyword
519130	Internet Publishing and Broadcasting and Web Search Portals	Keyword
541330	Engineering Services	Keyword
541511	Custom Computer Programming Services	Keyword
541519	Other Computer Related Services	Keyword
541613	Marketing Consulting Services	Keyword
541618	Other Management Consulting Services	Keyword
541810	Advertising Agencies	Keyword
541860	Direct Mail Advertising	Keyword
541890	Other Services Related to Advertising	Keyword
541990	All Other Professional, Scientific, and Technical Services	Keyword
561920	Convention and Trade Show Organizers	Keyword
423620	Household Appliances, Electric Housewares, and Consumer Electronics Merchant Wholesalers	Keyword
236115	New Single-Family Housing Construction (except For-Sale Builders)	Keyword
236220	Commercial and Institutional Building Construction	Keyword
236220	Commercial and Institutional Building Construction	Keyword
238350	Finish Carpentry Contractors	Keyword
238351	Residential Finish Carpentry Contractors	Keyword
333249	Other Industrial Machinery Manufacturing	Keyword

339999	All Other Miscellaneous Manufacturing	Keyword
423220	Home Furnishing Merchant Wholesalers	Keyword
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	Keyword
425110	Business to Business Electronic Markets	Keyword
444120	Paint and Wallpaper Stores	Keyword
541840	Media Representatives	Keyword
813930	Labor Unions and Similar Labor Organizations	Keyword
Metal, Stone, & Wood		
327991	Cut Stone and Stone Product Manufacturing	Conditional
332323	Ornamental and Architectural Metal Work Manufacturing	Conditional
337212	Custom Architectural Woodwork and Millwork Manufacturing	Conditional
238141	Masonry Contractors	Keyword
327390	Other Concrete Product Manufacturing	Keyword
327420	Gypsum Product Manufacturing	Keyword
327999	All Other Miscellaneous Nonmetallic Mineral Product Manufacturing	Keyword
339910	Jewelry and Silverware Manufacturing	Keyword
423510	Metal Service Centers and Other Metal Merchant Wholesalers	Keyword
423390	Other Construction Material Merchant Wholesalers	Keyword
811420	Upholstery and Furniture Repair	Keyword
Textiles		
451130	Sewing, Needlework, and Piece Goods Stores	Primary
314910	Textile Bag and Canvas Mills	Keyword
453220	Gift, Novelty, and Souvenir Stores	Keyword
493110	General Warehousing and Storage	Keyword
314999	All Other Miscellaneous Textile Product Mills	Keyword
315190	Other Apparel Knitting Mills	Keyword
443141	Household Appliance Stores	Keyword
451120	Hobby, Toy, and Game Stores	Keyword
Jewelry		
423940	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers	Primary
448310	Jewelry Stores	Primary
811490	Other Personal and Household Goods Repair and Maintenance	Keyword
448150	Clothing Accessories Stores	Keyword
551114	Corporate, Subsidiary, and Regional Managing Offices	Keyword
999999	Unclassified	Keyword

Education, Health, & Museums		
519120	Libraries and Archives	Conditional
611610	Fine Arts Schools	Conditional
712110	Museums	Conditional
611110	Elementary and Secondary Schools	Keyword
611710	Educational Support Services	Keyword
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists	Keyword
611513	Apprenticeship Training	Keyword
Artists		
711510	Independent Artists, Writers, and Performers	Conditional
315240	Women's, Girls', and Infants' Cut and Sew Apparel Manufacturing	Keyword
814110	Private Households	Keyword
Galleries & Promoters		
453920	Art Dealers	Primary
453998	All Other Miscellaneous Store Retailers (except Tobacco Stores)	Keyword
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	Keyword
454112	Electronic Auctions	Keyword
531311	Residential Property Managers	Keyword

Appendix Table A.7: VACD Employment by Subsector, 2000-2012

Subsector	Year												
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Architecture & Design	2,003	1,983	1,930	1,835	1,726	1,789	1,859	1,929	1,970	1,813	1,596	1,621	1,890
Artists	10	9	9	10	11	10	9	8	10	7	7	9	23
Education, Health, and Museums	-	-	-	-	-	-	389	-	-	467	436	-	506
Galleries & Promoters	171	120	107	96	81	80	85	73	78	62	57	54	50
Glass	-	-	-	-	-	-	61	-	-	51	47	-	51
Jewelry	1,205	1,121	1,076	1,078	970	961	914	890	873	761	741	714	734
Metal, Stone, & Wood	105	120	113	82	88	103	82	81	83	77	41	34	51
Photography	944	1,020	1,034	1,060	1,081	962	805	815	814	653	578	558	469
Printing	8,649	8,509	7,944	7,537	7,162	7,065	7,229	7,069	6,918	6,328	5,849	5,674	5,567
Textiles	304	244	240	466	339	350	315	314	304	269	256	261	233
Total in Cuyahoga County	13,946	13,693	13,026	12,755	11,987	11,829	11,748	11,670	11,555	10,489	9,607	9,413	9,573
Total in Ohio	81,676	79,542	74,046	71,868	69,443	68,497	68,131	67,056	65,487	59,599	52,675	51,610	51,534

Source: Quarterly Census of Employment and Wages (QCEW)

Note: Any omitted data is due to confidentiality restrictions associated with the data source.

Appendix Table A.8: VACD Payroll by Subsector, 2000-2012 (in \$ Millions)

Subsector	Year												
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Arch & Design	\$105.3	\$110.7	\$106.8	\$97.2	\$92.8	\$91.5	\$102.1	\$110.1	\$113.2	\$103.5	\$82.3	\$85.5	\$110.0
Artists	\$0.3	\$0.2	\$0.2	\$0.2	\$0.3	\$0.3	\$0.3	\$0.3	\$0.3	\$0.2	\$0.2	\$0.3	\$0.3
Education, Health, and Museums	-	-	-	-	-	-	\$16.2	-	-	\$18.2	\$16.4	-	\$18.6
Galleries & Promoters	\$3.9	\$2.6	\$2.4	\$2.1	\$2.0	\$1.7	\$2.2	\$1.8	\$1.9	\$1.9	\$1.6	\$1.5	\$1.6
Glass	-	-	-	-	-	-	\$3.1	-	-	\$2.5	\$2.5	-	\$2.8
Jewelry	\$40.7	\$34.7	\$33.4	\$31.3	\$29.8	\$28.2	\$28.5	\$27.8	\$25.2	\$22.8	\$21.9	\$21.6	\$22.8
Metal, Stone, & Wood	\$4.2	\$4.6	\$4.6	\$3.7	\$3.7	\$3.6	\$4.0	\$3.7	\$3.7	\$3.5	\$1.7	\$1.6	\$3.0
Photography	\$31.8	\$34.6	\$35.1	\$35.4	\$34.9	\$32.2	\$33.4	\$31.2	\$33.0	\$24.3	\$20.0	\$21.3	\$18.6
Printing	\$456.4	\$402.5	\$453.0	\$360.2	\$353.3	\$338.4	\$346.0	\$339.1	\$338.4	\$318.5	\$288.5	\$286.3	\$297.1
Textiles	\$4.5	\$3.2	\$3.8	\$17.2	\$5.5	\$4.9	\$4.0	\$4.2	\$4.2	\$3.5	\$3.2	\$3.5	\$3.7
Total in Cuyahoga County	\$668.1	\$613.9	\$661.1	\$570.3	\$543.0	\$520.5	\$539.9	\$538.0	\$539.8	\$498.9	\$438.2	\$439.8	\$478.5
Total in Ohio	\$3,607	\$3,404	\$3,238	\$3,131	\$2,978	\$2,957	\$3,004	\$3,013	\$2,929	\$2,609	\$2,238	\$2,253	\$2,368
Total in U.S.	\$78,172	\$78,397	\$72,766	\$70,467	\$68,424	\$67,257	\$70,507	\$72,038	\$70,565	\$61,120	\$52,927	\$52,696	\$53,655

Source: Quarterly Census of Employment and Wages (QCEW)

Note: Any omitted data is due to confidentiality restrictions associated with the data source.

All data has been adjusted to 2012 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data

Appendix Table A.9: VACD Average Wage by Subsector, 2000-2012

Subsector	Year												
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Arch & Design	\$52,548	\$55,813	\$55,370	\$52,970	\$53,755	\$51,142	\$54,908	\$57,077	\$57,465	\$57,100	\$51,582	\$52,774	\$58,212
Artists	\$32,014	\$25,496	\$21,042	\$17,661	\$25,998	\$26,353	\$30,032	\$34,516	\$25,707	\$29,691	\$27,571	\$39,553	\$12,704
Education, Health, and Museums	-	-	-	-	-	-	\$41,722	-	-	\$38,945	\$37,567	-	\$36,881
Galleries & Promoters	\$23,112	\$21,568	\$22,315	\$22,006	\$24,531	\$21,013	\$26,386	\$24,448	\$24,960	\$30,320	\$27,963	\$28,579	\$32,467
Glass	-	-	-	-	-	-	\$49,832	-	-	\$49,441	\$53,040	-	\$54,586
Jewelry	\$33,798	\$30,988	\$30,992	\$29,042	\$30,705	\$29,314	\$31,191	\$31,265	\$28,848	\$30,009	\$29,521	\$30,201	\$31,010
Metal, Stone, & Wood	\$39,972	\$38,077	\$40,254	\$44,805	\$41,489	\$35,293	\$49,336	\$46,334	\$44,256	\$44,956	\$41,240	\$47,024	\$57,905
Photography	\$33,689	\$33,912	\$33,911	\$33,428	\$32,328	\$33,489	\$41,515	\$38,304	\$40,615	\$37,121	\$34,613	\$38,265	\$39,585
Printing	\$52,772	\$47,303	\$57,033	\$47,785	\$49,330	\$47,896	\$47,860	\$47,964	\$48,914	\$50,330	\$49,330	\$50,451	\$53,372
Textiles	\$14,771	\$13,092	\$15,807	\$36,830	\$16,191	\$13,897	\$12,806	\$13,263	\$13,775	\$13,143	\$12,514	\$13,465	\$15,881
Average in Cuyahoga County	\$47,906	\$44,835	\$50,748	\$44,715	\$45,300	\$43,999	\$45,952	\$46,098	\$46,717	\$47,565	\$45,618	\$46,725	\$49,980
Average in Ohio	\$44,170	\$42,802	\$43,734	\$43,566	\$42,887	\$43,170	\$44,094	\$44,944	\$44,729	\$43,777	\$42,495	\$43,659	\$45,963
Average in U.S.	\$46,711	\$46,871	\$46,372	\$46,313	\$46,033	\$45,475	\$47,405	\$48,359	\$48,066	\$46,448	\$45,129	\$45,672	\$46,513

Source: Quarterly Census of Employment and Wages (QCEW)

Note: Any omitted data is due to confidentiality restrictions associated with the data source.

All data has been adjusted to 2012 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data

Appendix Table A.10: VCAD Number of Establishments by Subsector, 2000-2012

Subsector	Year												
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Architecture & Design	321	325	329	321	296	308	304	311	295	290	280	280	288
Artists	9	9	9	9	8	8	9	8	9	9	7	7	9
Education, Health, and Museums	-	-	-	-	-	-	11	-	-	14	13	-	13
Galleries & Promoters	38	31	29	28	25	23	20	19	22	21	17	16	18
Glass	-	-	-	-	-	-	5	-	-	5	3	-	4
Jewelry	175	181	175	173	148	145	144	134	128	137	138	134	135
Metal, Stone, & Wood	12	11	12	9	9	9	9	9	8	7	7	6	7
Photography	135	129	136	131	129	122	118	112	112	92	86	80	79
Printing	306	292	277	266	256	245	230	215	207	195	176	178	173
Textiles	27	28	28	28	28	31	27	28	26	23	20	23	19
Total in Cuyahoga County	1,038	1,020	1,010	982	913	905	876	854	824	792	747	739	745
Total in Ohio	5,977	5,944	5,827	5,711	5,555	5,520	5,384	5,297	5,215	5,038	4,747	4,629	4,604
Total in U.S.	186,721	184,457	184,655	184,796	183,721	183,728	184,681	186,131	185,207	180,712	172,773	168,159	166,407

Source: Quarterly Census of Employment and Wages (QCEW)

Note: Any omitted data is due to confidentiality restrictions associated with the data source.

Appendix Table A.11: SOC Codes of VACD-Related Occupations

SOC Code	Occupation Title
13-1011	Agents and business managers of artists, performers, and athletes
17-1011	Architects, except landscape and naval
17-1012	Landscape architects
17-3011	Architectural and civil drafters
25-1031	Architecture Teachers, Postsecondary
25-1121	Art, drama, and music teachers, postsecondary
25-4012	Curators
25-4013	Museum Technicians and Conservators
27-1011	Art directors
27-1012	Craft artists
27-1013	Fine artists, including painters, sculptors, and illustrators
27-1014	Multi-media artists and animators
27-1019	Artists and related workers, all other
27-1021	Commercial and industrial designers
27-1022	Fashion designers
27-1023	Floral designers
27-1024	Graphic designers
27-1025	Interior designers
27-1026	Merchandise displayers and window trimmers
27-1027	Set and exhibit designers
27-1029	Designers, all other
27-4021	Photographers
43-9031	Desktop publishers
49-9061	Camera and Photographic Equipment Repairers
51-9071	Jewelers and precious stone and metal workers
51-9123	Painting, coating, and decorating workers
51-9151	<i>Photographic process workers and processing machine operators</i>
51-9131*	<i>Photographic process workers</i>
51-9132*	<i>Photographic processing machine operators</i>

*denotes SOC Codes that have been changed due to the 2010 SOC system revision. Based on the crosswalk, the two occupations have been combined into one code, displayed in *italics* (51-9151). For the purpose of this study, all three SOC Codes have been combined into one SOC Code (51-9151), and is used throughout the years of the study.

Source: US Bureau of Labor Statistics, Standard Occupational Classification

Appendix Table A.12: VACD Occupational Employment, Cleveland MSA, 2006-2012

SOC Code	Occupation Title	2006	2007	2008	2009	2010	2011	2012
13-1011	Agents and business managers of artists, performers, and athletes	119	113	120	118	118	120	101
17-1011	Architects, except landscape and naval	680	683	706	632	556	527	531
17-1012	Landscape architects	120	121	126	108	95	90	92
17-3011	Architectural and civil drafters	630	460	340	410	390	390	290
25-1031	Architecture Teachers, Postsecondary	28	28	29	34	34	35	35
25-1121	Art, drama, and music teachers, postsecondary	570	830	900	1,180	1,210	1,340	1,290
25-4012	Curators	65	70	70	70	50	50	60
25-4013	Museum Technicians and Conservators	46	60	30	40	70	60	60
27-1011	Art directors	180	210	200	190	240	200	200
27-1012	Craft artists	23	22	25	27	23	23	26
27-1013	Fine artists, including painters, sculptors, and illustrators	49	48	40	38	43	50	59
27-1014	Multi-media artists and animators	229	229	224	191	172	163	159
27-1019	Artists and related workers, all other	29	29	27	27	24	22	35
27-1021	Commercial and industrial designers	284	280	286	242	239	259	263
27-1022	Fashion designers	64	63	66	55	62	64	72
27-1023	Floral designers	390	460	470	490	480	350	260
27-1024	Graphic designers	1,500	1,630	1,610	1,550	1,640	1,690	1,530
27-1025	Interior designers	310	313	316	380	320	270	290
27-1026	Merchandise displayers and window trimmers	370	270	190	180	280	310	340
27-1027	Set and exhibit designers	53	53	49	49	48	47	46
27-1029	Designers, all other	76	75	70	66	56	51	47
27-4021	Photographers	404	407	415	374	348	335	323
43-9031	Desktop publishers	324	318	297	246	205	178	156
49-9061	Camera and Photographic Equipment Repairers	25	24	24	18	15	13	12
51-9071	Jewelers and precious stone and metal workers	202	200	197	184	169	167	168
51-9123	Painting, coating, and decorating workers	241	236	250	219	178	149	130
51-9151*	<i>Photographic process workers and processing machine operators</i>	574	580	500	463	403	349	309

Source: Bureau of Labor Statistics Occupation Employment Statistics (OES) Survey; Quarterly Census of Employment and Wages (QCEW)

*denotes SOC Codes that have been changed due to the 2010 SOC system revision. Based on the crosswalk, the two occupations have been combined into one code, displayed in *italics* (51-9151). For the purpose of this study, all three SOC Codes have been combined into one SOC Code (51-9151), and is used throughout the years of the study.

Appendix Table A.13: Survey Invitation Letter



*Maxine Goodman Levin College of Urban Affairs
Center for Economic Development*

[Name of artist]

[Affiliated organization or business if any]

Dear [name],

The Center for Economic Development (the Center) at Cleveland State University's Levin College of Urban Affairs is conducting research on the Cleveland Visual Arts, Crafts, and Design (VACD) sector commissioned by the Community Partnership for Arts and Culture (CPAC). The Center is looking to gain a full understanding of VACD's components and economic impact through focus groups practice. On behalf of the Center and CPAC, we would like you to participate in this focus group because of your significant role in the Cleveland visual arts sector.

During the focus group session we will present interim results of the research to further vet and endorse our study thus far and also to gather additional relevant information. Your input and advice on these components are important to us as a way to further investigate all facets of the visual arts sector.

We anticipate no more than a two hour time commitment for the focus group, which will be held on [date and location of a focus group]. Registration and a light reception will start at [time of registration] with the focus group beginning promptly at [time of a focus group]. Free parking will be available.

If you have any questions please contact Andrew Lang [email and phone number] or Dr. Iryna Lendel at [email and a phone number]. We look forward to working with you and sharing our results.

Sincerely,

Dr. Iryna Lendel, Assistant Director
Center for Economic Development
Maxine Goodman Levin College of Urban Affairs
Cleveland State University
2121 Euclid Ave, UR355, Cleveland, Ohio 44115

Tom Schorgl, President and CEO
Community Partnership for Arts and Culture
1900 Superior Avenue, Suite 130
Cleveland, Ohio 44114

Appendix A.14: VACD - Visual Artists Survey

Q1 Dear Cleveland Visual Artist, Crafter, and Designer:

The Center for Economic Development (The Center) at Cleveland State University's Maxine Goodman Levin College of Urban Affairs is conducting research on the Cleveland Visual Arts, Craft and Design (VACD) Sector commissioned by the Community Partnership for Arts and Culture. The Center is looking to survey various members of the visual arts community within Cuyahoga County. On behalf of the Center and the Community Partnership for Arts and Culture, we are asking you to participate in this confidential survey.

The survey will take approximately 10 minutes of your time. All responses are strictly confidential and the data will be aggregated across the entire spectrum of respondents, so that no information can be attributed to any one individual.

Informed Consent: Your participation in the study is voluntary. The risks of participating do not exceed those of daily living. You may withdraw from the research and discontinue the survey at any time, without penalty. All participants shall remain anonymous within research findings; no identified individual responses will be made public without his/her written permission.

If you have any questions regarding your rights as a research subject, you may contact the Center for Economic Development at Cleveland State University, 216-875-9967. I am aware of my rights as a research subject:

- ☐ Yes (1)
- ☐ No (2)

If No Is Selected, Then Skip to End of Survey

Q2 What do you consider as your primary medium/media?

- ☐ Ceramics/Pottery (1)
- ☐ Design (2)
- ☐ Digital/Electronic (3)
- ☐ Drawing (4)
- ☐ Glass (5)
- ☐ Jewelry (6)
- ☐ Mixed Media (7)
- ☐ Paint (8)
- ☐ Paper (9)
- ☐ Photography (10)
- ☐ Plastic (11)
- ☐ Printmaking (12)
- ☐ Sculpture (13)
- ☐ Textiles/Fiber (14)
- ☐ Video/Multimedia (15)
- ☐ Other (16) _____

Q3 What is/are the primary material(s) you use to create your art?

- ☐ Charcoal (1)
- ☐ Clay (2)
- ☐ Computers (3)
- ☐ Glass (4)
- ☐ Metal (5)
- ☐ Paint (6)
- ☐ Paper (7)
- ☐ Pencil/Pen (8)
- ☐ Plastic (9)
- ☐ Stone (10)
- ☐ Textiles (11)
- ☐ Other (12) _____

Q36 What percentage of your material(s) do you buy locally (from a Cuyahoga County vendor)?

- ☐ 0% (1)
- ☐ 1%-10% (2)
- ☐ 11%-20% (3)
- ☐ 21%-30% (4)
- ☐ 31%-40% (5)
- ☐ 41%-50% (6)
- ☐ 51%-60% (7)
- ☐ 61%-70% (8)
- ☐ 71%-80% (9)
- ☐ 81%-90% (10)
- ☐ 91%-100% (11)

Q6 Where do you make your craft?

- ☐ I create art at home (1)
- ☐ I create art in a live/work space (2)
- ☐ I create art in a studio owned by others (3)
- ☐ I create art in a studio co-owned with others (4)
- ☐ I create art in a studio that I solely own (5)
- ☐ I work for a large company (6)

Answer If Where do you make your craft? I work for a large company Is Selected

Q37 The large company you work for, is its primary focus arts-related?

- ☐ Yes (1)
- ☐ No (2)

Answer If The large company you work for, is its primary focus arts... No Is Selected

Q38 If no, what is their main focus?

Q7 Is your arts-related business a:

- ☐ Registered for-profit organization (1)
- ☐ Registered non-profit organization (2)
- ☐ Not registered (3)
- ☐ Independent contractor (4)
- ☐ Other (5) _____

Q8 What type of location do you primarily sell/display your art?

- ☐ Church (1)
- ☐ Coffee shop (2)
- ☐ Community events (3)
- ☐ Corporate events (4)
- ☐ Juried art show (5)
- ☐ Art Show (6)
- ☐ Craft fair (7)
- ☐ Gallery (8)
- ☐ Private parties (9)
- ☐ Public spaces (i.e. street corner, public square, farmer's market) (10)
- ☐ Studio (11)
- ☐ School/University (12)
- ☐ Other businesses (13)
- ☐ Online (Please list sites) (14) _____
- ☐ Other (15) _____

Q9 Geographically, where do you primarily display/sell your art?

- ☐ Within Cuyahoga County (1)
- ☐ Outside of Cuyahoga County, but within the Cleveland/Akron/Youngstown region (2)
- ☐ Outside of the Cleveland/Akron/Youngstown region, but in the state of Ohio (3)
- ☐ In other states than Ohio, but within the U.S. (4)
- ☐ Internationally (5)
- ☐ Internet (6)

Answer If Geographically, where do you primarily display your art? Within Cuyahoga County Is Selected

Q10 On average, how many times do you display/sell your art WITHIN Cuyahoga County per year?

- ☐ 0 (1)
- ☐ 1 to 3 (2)
- ☐ 4 to 6 (3)
- ☐ 7 to 10 (4)
- ☐ More than 10 (5)

Answer If Geographically, where do you primarily display/sell your ... Within Cuyahoga County Is Selected

Q21 Which major festivals WITHIN Cuyahoga County do you participate in as a visual artist?

Answer If Geographically, where do you primarily display your art? Outside of Cuyahoga County, but within the Cleveland/Akron/Youngstown region Is Selected Or Geographically, where do you primarily display your art? Outside of the Cleveland/Akron/Youngstown region, but in the state of Ohio Is Selected Or Geographically, where do you primarily display your art? In other states than Ohio, but within the U.S. Is Selected Or Geographically, where do you primarily display your art? Internationally Is Selected

Q11 On average, how many times do you display/sell your art OUTSIDE of Cuyahoga County per year?

- ☐ 0 (1)
- ☐ 1 to 3 (2)
- ☐ 3 to 5 (3)
- ☐ 6 to 10 (4)
- ☐ More than 10 (5)

Answer If Geographically, where do you primarily display/sell your ... Outside of Cuyahoga County, but within the Cleveland/Akron/Youngstown region Is Selected Or Geographically, where do you primarily display/sell your ... Outside of the Cleveland/Akron/Youngstown region, but in the state of Ohio Is Selected Or Geographically, where do you primarily display/sell your ... In other states than Ohio, but within the U.S. Is Selected Or Geographically, where do you primarily display/sell your ... Internationally Is Selected

Q42 Which major festivals OUTSIDE of Cuyahoga County do you participate in as a visual artist?

Q39 Is there significant competition in your medium from WITHIN Cuyahoga County?

- ☐ Yes (1)
- ☐ No (2)

Answer If Is there significant competition in your medium from WITHIN Yes Is Selected

Q44 There is competition in your medium from WITHIN Cuyahoga County for:

- ☐ Customers (1)
- ☐ Sales (2)
- ☐ Acceptance into juried shows (3)
- ☐ Gallery space/contracts (4)
- ☐ Other (5) _____

Q40 Is there significant competition in your medium from OUTSIDE of Cuyahoga County?

- ☐ Yes (1)
- ☐ No (2)

Answer If Is there is a lot of competition within your medium from ... Yes Is Selected

Q45 There is competition in your medium from OUTSIDE Cuyahoga County for:

- ☐ Customers (1)
- ☐ Sales (2)
- ☐ Acceptance into juried shows (3)
- ☐ Gallery space/contracts (4)
- ☐ Other (5) _____

Q13 Is your primary occupation arts related?

- ☐ Yes (1)
- ☐ No (2)

Q14 What is your primary occupation?

Q15 What portion of your personal income (or family income) comes from selling visual arts:

- ☐ 0%-10% (1)
- ☐ 11%-20% (2)
- ☐ 21%-30% (3)
- ☐ 31%-40% (4)
- ☐ 41%-50% (5)
- ☐ 51%-60% (6)
- ☐ 61%-70% (7)
- ☐ 71%-80% (8)
- ☐ 81%-90% (9)
- ☐ 91%-100% (10)

Q16 Where does your art income primarily come from?

- ☐ Freelance work (1)
- ☐ Full-time art-related job (2)
- ☐ Part-time art-related job (3)
- ☐ Selling art (4)
- ☐ Teaching / consulting (5)
- ☐ Social assistance / retirement (6)
- ☐ Other (7) _____

Q17 Have you had formal training in visual arts?

- ☐ Yes (1)
- ☐ No (2)

Answer If Have you had formal training in art? Yes Is Selected

Q18 Where did you receive your training? (Please provide College/Organization, city, and state)

Q19 How long have you been creating visual arts?

- ☐ Less than 5 years (1)
- ☐ 6 to 10 years (2)
- ☐ 11 to 20 years (3)
- ☐ More than 20 years (4)

Answer If Geographically, where do you primarily display/sell your ... Within Cuyahoga County Is Selected

Q22 On average, how much money do you earn per art display, show, and/ or, festival WITHIN Cuyahoga County?

- ☐ Less than \$99 (1)
- ☐ \$100 - \$249 (2)
- ☐ \$250 - \$499 (3)
- ☐ \$500 - \$999 (4)
- ☐ \$1,000 - \$1,999 (5)
- ☐ \$2,000 - \$2,999 (6)
- ☐ \$3,000 - \$3,999 (7)
- ☐ \$4,000 - \$4,999 (8)
- ☐ Over \$5,000 (9)

Answer If Geographically, where do you primarily display/sell your ... Outside of Cuyahoga County, but within the Cleveland/Akron/Youngstown region Is Selected Or Geographically, where do you primarily display/sell your ... Outside of the Cleveland/Akron/Youngstown region, but in the state of Ohio Is Selected Or Geographically, where do you primarily display/sell your ... In other states than Ohio, but within the U.S. Is Selected Or Geographically, where do you primarily display/sell your ... Internationally Is Selected

Q43 On average, how much money do you earn per art display, show, and/ or, festival OUTSIDE Cuyahoga County?

- ☐ Less than \$99 (1)
- ☐ \$100 - \$249 (2)
- ☐ \$250 - \$499 (3)
- ☐ \$500 - \$999 (4)
- ☐ \$1,000 - \$1,999 (5)
- ☐ \$2,000 - \$2,999 (6)
- ☐ \$3,000 - \$3,999 (7)
- ☐ \$4,000 - \$4,999 (8)
- ☐ Over \$5,000 (9)

Q24 Would you like to be included in the Directory of Artists, Designers, Organizations, and Businesses provided to Community Partnership for Arts and Culture?

- ☐ Yes (1)
- ☐ No (2)

If Yes Is Selected, Then Skip To In order to be included in the direct...

Q48 Please provide your name and email if you would like to be entered to win 1 of 2 \$25 gift cards.

Name (1)

Email (2)

Answer If Would you like to be included in the Directory of Artists... Yes Is Selected

Q34 In order to be included in the directory please provide your contact information:

Name (1)

Address (2)

Address 2 (3)

City (4)

State (5)

Zip Code (6)

Phone (7)

Email (8)

Website (9)

Q26 Gender:

- ☐ Male (1)
- ☐ Female (2)

Q27 What is your age?

- ☐ 18 to 29 (1)
- ☐ 30 to 39 (2)
- ☐ 40 to 49 (3)
- ☐ 50 to 59 (4)
- ☐ 60+ (5)

Appendix A.15: Sources of Survey Directory

Artist Directory Sources	
1	Facebook
2	Tumblr
3	Etsy
4	Initial Interviews
5	CPAC Artist Directory
6	Cleveland.com
7	Artist Websites
8	Artist Studio Websites
9	Art Gallery Websites
10	ArtistsofCleveland.com
11	Google
12	The Cleveland Foundation
13	The Cleveland Arts Prize
14	The Ohio Arts Council
15	Cuyahoga Arts & Culture
16	Cleveland Institute of Art
17	CoolCleveland.com
18	ClevelandScene.com
19	Cleveland State University
20	Artist Group Websites

Appendix A.16: Survey Instrument for Visitors of Art Fairs and Festivals



Maxine Goodman Levin College of Urban Affairs

Informed Consent

Your participation in the study is voluntary. The risks of participating do not exceed those of daily living. You may withdraw from the research and discontinue the survey at any time, without penalty. All participants shall remain anonymous within research findings; no identified individual responses will be made public without his/her written permission.

If you have any questions regarding your rights as a research subject, you may contact the Center for Economic Development at Cleveland State University, 216-875-9967.

1. I am aware of my rights as a research subject: (MANDATORY QUESTION)
 - a. Yes
 - b. No (Exit Survey)
2. If No, how many times have you attended this event in the past?
 - a. 1
 - b. 2
 - c. 3
 - d. 4
 - e. 5
 - f. 6+
3. Why did you come to this art fair instead of another event? (select all the apply)
 - a. Art
 - b. Close to Home
 - c. Entertainment
 - d. Entertainment for Children
 - e. Food
 - f. Friend/family participating in show
 - g. Music
 - h. Other
4. If you mentioned that you came to this even because of the art was it:
 - a. N/A
 - b. The art in general?
 - c. A specific artist?
 - d. A specific art type?
 - e. Other _____
5. Do you consider yourself any of the following:
 - a. N/A
 - b. Collector
 - c. Patron/Investor
 - d. Occasional buyer
 - e. Someone that buys art for decoration

- f. Someone that appreciates art, but doesn't purchase it
- 6. How many arts related events do you attend in Cuyahoga County per year?
 - a. 0
 - b. 1
 - c. 2
 - d. 3
 - e. 4
 - f. 5
 - g. 6
 - h. 7
 - i. 8
 - j. 9
 - k. 10+
- 7. How many arts related events do you attend outside of Cuyahoga County per year?
 - a. 0
 - b. 1
 - c. 2
 - d. 3
 - e. 4
 - f. 5
 - g. 6
 - h. 7
 - i. 8
 - j. 9
 - k. 10+
- 8. Did you want to come to this event, or did someone else bring you?
 - a. I wanted to come
 - b. I came with someone else
 - c. I was invited by someone else, but I wanted to come to this event
- 9. Including yourself, how many people are in your party today?
 - a. 1
 - b. 2
 - c. 3
 - d. 4
 - e. 5
 - f. 6+
- 10. Did you purchase any art/crafts/designs today?
 - a. Yes
 - b. No
 - c. I might if I find something I like
- 11. If so, how much did you spend in total?
 - a. Less than \$25
 - b. \$26-\$75
 - c. More than \$75
- 12. Have you ever purchased art at any art fairs you have attended?
 - a. Yes
 - b. No
- 13. If yes, how often do you purchase art at these events?

- a. N/A
 - b. This is the first time I ever bought something
 - c. Normally I just look, but occasionally I buy something
 - d. I usually find something that is worth buying
 - e. I always buy something
14. Do you plan to dine near or at the fair?
- a. Yes
 - b. No
15. If yes, how much are you planning to spend on food per person?
- a. Less than \$10
 - b. \$11-\$25
 - c. \$26-\$40
 - d. \$41-\$55
 - e. More than \$55
16. Have you seen any artists today that you liked, and you would want to look up further?
- a. Yes
 - b. No
17. What is your age?
- a. 18-29
 - b. 30-39
 - c. 40-49
 - d. 50-59
 - e. 60+
18. You are:
- a. N/A
 - b. Male
 - c. Female
19. What city do you live in? _____
20. To be entered into a drawing to win a gift card please provide your contact information:
- a. Name_____
 - b. Email Address_____

Thank you for your participation in this survey on the Cleveland visual arts sector. Your participation is valuable and greatly appreciated.

Appendix A.17: Survey Instrument of Artists at Art Fairs and Festivals



Maxine Goodman Levin College of Urban Affairs

Center for Economic Development

Informed Consent

Your participation in the study is voluntary. The risks of participating do not exceed those of daily living. You may withdraw from the research and discontinue the survey at any time, without penalty. All participants shall remain anonymous within research findings; no identified individual responses will be made public without his/her written permission.

If you have any questions regarding your rights as a research subject, you may contact the Center for Economic Development at Cleveland State University, 216-875-9967.

21. I am aware of my rights as a research subject: (MANDATORY QUESTION)

- a. Yes
- b. No (Exit Survey)

22. Is this your first time participating at this art fair?

- a. Yes
- b. No

23. If no, how many times have you had a table at this show in the past?

- a. N/A
- b. 1
- c. 2
- d. 3
- e. 4
- f. 5
- g. 6+

24. What do you consider as your primary medium/media? (select all that apply)

- a. Ceramics/Pottery
- b. Design
- c. Digital/Electronic
- d. Drawing
- e. Glass
- f. Jewelry
- g. Mixed Media
- h. Paint
- i. Paper
- j. Photography
- k. Plastic
- l. Printmaking
- m. Sculpture

- n. Textiles/Fiber
 - o. Video/Multimedia
 - p. Other _____
25. Why did you choose to set up a table at this fair? (select all the apply)
- a. Large amount of foot traffic
 - b. Friend recommendation
 - c. Good sales
 - d. Quality organization of event
 - e. This event targets my customer base well
 - f. Other _____
26. Which major art festivals in Cuyahoga County do you attend as a patron? (select all the apply)
- a. 78th Studios Events
 - b. Arts by the Falls
 - c. Arts in the Village (Legacy Village)
 - d. Berea Arts Fest
 - e. Bizarre Bazaar (East or West)
 - f. Cain Park Arts Festival
 - g. Cleveland by Hand (IX Center)
 - h. Clifton Arts and Music
 - i. Ingenuity Festival
 - j. Lakewood Arts Fest
 - k. Shaker Heights Arts and Music
 - l. Tremont Arts Fest
 - m. Others(List)
27. Which major art festivals **IN** Cuyahoga County do you participate in as a visual artist? (select all that apply)
- a. 78th Studios Events
 - b. Arts by the Falls
 - c. Arts in the Village (Legacy Village)
 - d. Berea Arts Fest
 - e. Bizarre Bazaar (East or West)
 - f. Cain Park Arts Festival
 - g. Cleveland by Hand (IX Center)
 - h. Clifton Arts and Music
 - i. Ingenuity Festival
 - j. Lakewood Arts Fest
 - k. Shaker Heights Arts and Music
 - l. Tremont Arts Fest
 - m. Others:
28. Which major art festivals **OUTSIDE** of Cuyahoga County do you participate in as a visual artist? (select all the apply)
- a. Akron Arts Expo
 - b. Cincinnati Fringe Festival
 - c. Columbus Arts Festival
 - d. Dublin Art Fair
 - e. Easton Art Affair (Columbus)
 - f. Juneteenth Ohio Festival (Columbus)
 - g. Kent Art in the Park

- h. Medina Chalk Art Festival
 - i. Ohio Mart (Akron)
 - j. Passport to the World Events (Cincinnati)
 - k. Spring Festival of Crafts (Toledo)
 - l. Warren County Festival of the Arts
 - m. Wooster Spring Arts & Craft Show
 - n. Others:
29. Do you customize your art for the clientele at particular shows?
- a. Yes
 - b. No
30. Do you customize your art for the clientele at **this** show?
- a. Yes
 - b. No
31. Is there significant competition in your medium: (select all that apply)
- a. There is a lot of competition within my medium from within Cuyahoga County
 - b. There is a lot of competition within my medium from outside of Cuyahoga County
 - c. There are not enough venues that feature my medium in Cuyahoga County
 - d. Venues in my medium in Cuyahoga County are not actively seeking local artists
 - e. No, there is not significant competition in my medium in Cuyahoga County
32. On average, how many times do you show your art **IN** Cuyahoga County per year?
- a. 0
 - b. 1 to 3
 - c. 4 to 6
 - d. 7 to 10
 - e. More than 10
33. On average, how many times do you show your art **OUTSIDE** of Cuyahoga County per year?
- a. 0
 - b. 1 to 3
 - c. 4 to 6
 - d. 7 to 10
 - e. More than 10
34. Do you sell your art through a local business or online retailer, and if so, what mode?
- a. Galleries
 - b. Retail
 - c. Coffee Shops
 - d. Personal Website
 - e. Etsy
 - f. Other online
 - g. Other _____
35. What portion of your total income comes from the sale of your visual arts, crafts, and/or design?
- a. N/A
 - b. 0%-10%
 - c. 11%-20%
 - d. 21%-30%
 - e. 31%-40%
 - f. 41%-50%
 - g. 51%-60%
 - h. 61%-70%

- i. 71%-80%
 - j. 81%-90%
 - k. 91%-100%
36. In the last 3 years have your sales:
- a. Increased?
 - b. Decreased?
 - c. Stayed the same?
37. What is your primary occupation?
- a. Artist
 - b. Freelance in related art
 - c. Hospitality Industry
 - d. Manufacturing
 - e. Student
 - f. Teacher
 - g. Other
38. Including the creation and sale of your art, how many jobs do you have?
- a. N/A
 - b. 1
 - c. 2
 - d. 3
 - e. 4
 - f. 5 or more
39. Do you have a space for your art studio outside of your house?
- a. Yes
 - b. No
40. What is your city of residence? _____ -
41. What is your age?
- a. 18-29
 - b. 30-39
 - c. 40-49
 - d. 50-59
 - e. 60+
42. Do you identify as?
- a. Male
 - b. Female
43. To be entered into a drawing to win a gift card please provide your contact information:
- a. Name _____
 - b. Email Address _____

Thank you for your participation in this survey on the Cleveland visual arts sector. Your participation is valuable and greatly appreciated.

Appendix A.18: List of Events

Event	Date	Organization
78th St. Studios Art Walk	5/17/2013	Northcoast Promotions Inc.
Arts by the Falls	6/8/2013	Valley Art Center
Clifton Arts and Music Fest	6/15/2013	Cudell Events LLC
Shaker Heights Arts and Music	6/22/2013	Ohio Designer Craftsman
Cain Park Arts Festival	7/13/2013	Cain Park Arts Festival
Lakewood Arts Festival	8/3/2013	Lakewood Arts Festival
Berea Arts Fest	9/8/2013	Berea Arts Fest, Inc.
Ingenuity Fest	9/20/2013	Ingenuity Fest

Appendix A.19: Survey Instrument of Survey of Galleries, Shops, and Studios

CPAC - Gallery Survey

1. What type of Organization are you Interviewing?

- ☐ Gallery
- ☐ Shop
- ☐ Studio

2. Information about Gallery/Shop/Studio

Contact/Interviewee:

Name:

3. Hello, my name is _____. I'm with the Center for Economic Development at Cleveland State University. We are conducting a study on the Economic Impact of the Visual Arts, Crafts, and Design Sector in Cuyahoga County in partnership with the Community Partnership for Arts and Culture (CPAC). As a part of our study we are surveying galleries, shops, and studios to get a better feel for your operations, local consumer purchases, as well as the interactions of local artist with Gallery/Shop/Studio. The survey should take not more than **15** minutes. Please keep in mind, we refer to Cleveland, or local, we are referring to Cuyahoga County.

4. Informed Consent

I need to read you an informed consent declaration; this is the only mandatory question of the survey.

Your participation in the study is voluntary. The risks of participating do not exceed those of daily living. You may withdraw from the research and discontinue the survey at any time, without penalty. All participants shall remain anonymous within research findings; no identified individual responses will be made public without his/her written permission. If you have any questions regarding your rights as a research subject, you may contact the Center for Economic Development at Cleveland State University, 216-875-9967.

I am aware of my rights as a research subject:

- ☐ Yes
- ☐ No

If No Is Selected, Then Skip To End of Survey

We are trying to ascertain who purchases art from Gallery/Shop/Studio, so the following questions will be in regards to that. On average who buys more in your Gallery/Shop/Studio?

5. Men or Women?

- ☐ Men
- ☐ Women
- ☐ Both equally

6. White, African American, Latino, or Other?

- ☐ White
- ☐ African American
- ☐ Latino
- ☐ Other _____
- ☐ All equally

7. Couples or Singles?

- ☐ Couples
- ☐ Singles
- ☐ Both

8. Those under 40 or those over 40?

- ☐ Under 40
- ☐ Over 40
- ☐ Both

9. How would you describe your customer base?

- ☐ Collector
- ☐ Patron/Investor
- ☐ Occasional buyer
- ☐ Someone that buys art for decoration
- ☐ Other _____

10. Do you fill requests for art from customers?

- ☐ Yes
- ☐ No
- ☐ Other _____

11. Are most of your customers from:

- ☐ Within Cuyahoga County?
- ☐ Outside of Cuyahoga County, but within Ohio?
- ☐ Outside of Ohio?

12. Over the last 3 years have you seen an increase in demand for local art to be displayed at your Gallery/Shop/Studio?

- ☐ Yes
- ☐ No

13. Over the last 3 years have you seen an increase in the quality of local art?

- ☐ Yes
- ☐ No

Answer If Over the last 3 years have you seen an increase in the ... Yes Is Selected

14. In what medium?

- ☐ Ceramics/Pottery
- ☐ Design
- ☐ Digital/Electronic
- ☐ Drawing
- ☐ Glass
- ☐ Jewelry
- ☐ Mixed Media
- ☐ Paint
- ☐ Paper
- ☐ Photography
- ☐ Plastic
- ☐ Printmaking
- ☐ Sculpture
- ☐ Textiles/Fiber
- ☐ Video/Multimedia
- ☐ All of them
- ☐ Other _____

15. Over the last 3 years have you seen an increase in demand for Cleveland art in other “art” cities?

- ☐ Yes
- ☐ No

Answer If Over the last 3 years have you seen an increase in demand. Yes Is Selected

16. In what medium?

- ☐ Ceramics/Pottery
- ☐ Design
- ☐ Digital/Electronic
- ☐ Drawing
- ☐ Glass
- ☐ Jewelry
- ☐ Mixed Media
- ☐ Paint
- ☐ Paper
- ☐ Photography
- ☐ Plastic
- ☐ Printmaking
- ☐ Sculpture
- ☐ Textiles/Fiber
- ☐ Video/Multimedia
- ☐ All of them
- ☐ Other _____

These questions are in regard to how you see your role in the Cleveland art market and the Cleveland art market in general:

17. In 3 words what do you see as your business mission statement? (open-ended)

18. How do you differentiate your Gallery/Shop/Studio from other Gallery/Shop/Studio? (open-ended)

19. Do you compare your Gallery/Shop/Studio to Gallery/Shop/Studios in other cities?(i.e. NYC, Chicago, LA)

- ☐ Yes
- ☐ No
- ☐ I don't know

If No Is Selected, Then Skip To What are the benefits of your current...

20. What cities do you use as comparable? (open-ended)

21. What are the benefits of your current location? (open-ended)

22. What role do you see art Gallery/Shop/Studio play in the Cleveland visual arts scene?

- ☐ Importers of art from other locations
- ☐ Exporters of art to other locations
- ☐ Promoters of art
- ☐ Exhibitors of art
- ☐ Other _____

23. Respond to the statement: "A Gallery/Shop/Studio's job is to sell art, not be a platform for the artist." (open-ended)

24. How do you classify the Cleveland arts scene in 3 words: (open-ended)

25. Does the image of Cleveland help you sell art?

- ☐ Yes - Why? _____
- ☐ No - Why? _____

The following questions are related to the business end of being an art Gallery/Shop/Studio's

26. In the last 3 years, have you seen sales:

- ☐ Increase? _____
- ☐ Decrease? _____
- ☐ Stay about the same? _____

27. Do businesses buy from your Gallery/Shop/Studio?

- ☐ Yes _____
- ☐ No _____

If No Is Selected, Then Skip To Do you have contracts with local ar...

28. What kind of business and/or corporations buy from your Gallery/Shop/Studio? (open-ended)

29. How do you establish contracts with a business? (open-ended)

30. Do you sell other items than art (i.e. framing/posters)?

- ☐ Yes, what do you sell? _____
- ☐ No

31. Do you have contracts with local artists?

- ☐ Yes
- ☐ No

If No Is Selected, Then Skip To Do you conduct business via the int...

32. How long are the contracts for? (open-ended)

33. What percentage of your business comes from contracts? (open-ended)

34. Do you conduct business via the Internet or have any online sales?

☐ Yes

☐ No

If No Is Selected, Then Skip To Do you purchase art, display it, or...

35. What platform do you use to sell the work online?

☐ Company Website

☐ Etsy

☐ Other online _____

☐ Other _____

36. How do you obtain the artwork that you display?

☐ Purchase art

☐ Display art

☐ Another arrangement _____

37. Do you work as a broker with Gallery/Shop/Studio in other cities?

☐ Yes

☐ No

38. What 3 major mediums do you sell in your Gallery/Shop/Studio?

☐ Ceramics/Pottery

☐ Design

☐ Digital/Electronic

☐ Drawing

☐ Glass

☐ Jewelry

☐ Mixed Media

☐ Paint

☐ Paper

☐ Photography

☐ Plastic

☐ Printmaking

☐ Sculpture

☐ Textiles/Fiber

☐ Video/Multimedia

☐ All of them

☐ Other _____

39. Thinking about sales in the last year, how many pieces of art do you sell per month, on average?
(open-ended)

40. Thinking about the art you had in your collection in the last year, what was the price of the MOST
expensive sale? (open-ended)

41. Thinking about the art you had in your collection in the last year, what was the price of the LEAST
expensive sale? (open-ended)

**On behalf of the Center for Economic Development and the Community Partnership for Arts and
Culture I thank you for your participation. We greatly appreciate your time.**

Appendix A.20: Directory of Artists

	Name	Medium
1	Abarca, Mike	Drawing
2	Abate, Brandon	Design
3	Adamo, Sara	Metal
4	Adams, Carol	Sculpture
5	Adams, Cheese	Design
6	Adams, Suzanne	Photography
7	Adams, Valerie	Painting
8	Aliberti, Gregory	Ceramics
9	Amato, Dan	Glass
10	Anderson, Amber	Visual
11	Anderson, Jonathan	Design
12	Anderson, Karl	Drawing
13	Anderson, Todd	Glass
14	Andes, Danielle	Photography
15	App, Alex	Visual
16	App, Oliver	Visual
17	Apple-Presser, Debbie	Mixed Media
18	Archer, Paulette	Painting
19	Argentieri, Pamela	Metal
20	Armstead, Linda	Painting
21	Arndt, John	Sculpture
22	Arnold, Anna	Painting
23	Arotin, April	Visual
24	Arthur, Sherry	Painting
25	Ascherman Jr., Herbert	Photography
26	Askov, Sharma	Jewelry
27	Babb, Elizabeth	Painting
28	Bachtell, Barbara	Visual
29	Bailey, Darby	Painting
30	Baker, Lawrence	Drawing
31	Bakhshi, Kathy Morris	Painting
32	Balbo, Tom	Paper
33	Ballew, Jan	Mixed Media
34	Baumliar, Kristen	Mixed Media
35	Bayer, Micol	Paper
36	Beard, Cynthia	Mixed Media
37	Beckwith, Karen	Printmaking
38	Begin, Sue	Mixed Media
39	Bell, Cushmere	Painting

40	Bercaw, Ruth	Mixed Media
41	Berg, Artur	Visual
42	Bergholz, David	Photography
43	Berr, Keith	Photography
44	Bevis, Susan	Design
45	Bias, Samantha	Painting
46	Billington, Peter	Glass
47	Bilovecky, Sean	Design
48	Bilyeu, Chad	Mixed Media
49	Birchfield, Jerry	Photography
50	Bird, Grainne	Sculpture
51	Biro, Bruce	Sculpture
52	Bixler, Gary	Sculpture
53	Bjel, Diana	Ceramics
54	Black, Donald	Photography
55	Black, Gordon	Glass
56	Black, Peg	Glass
57	Black,, D.A.	Photography
58	Blackman, Paula	Sculpture
59	Bleck, Cathie	Mixed Media
60	Bloom, Rashimba	Mixed Media
61	Bly, Kristin	Mixed Media
62	Boldware, Andrea	Ceramics
63	Boneham, Sunia	Painting
64	Bonner, Christine	Painting
65	Booth, Susan	Painting
66	Bordelois, Augusto	Painting
67	Bordine, Kate	Mixed Media
68	Boscath, Coletta	Painting
69	Bosse, Laura	Glass
70	Boswell, Lena	Crafts
71	Bowers, N. L.	Sculpture
72	Boyesen, Kristen	Painting
73	Boysen, Mary Ann	Painting
74	Brackett, Cassandra	Visual
75	Brandon, Judith M.	Painting
76	Bratek, Scott	Drawing
77	Breen, Barbara	Photography
78	Brewer, Kwanza	Visual
79	Brigid, Mary	Crafts
80	Broach, Tonya	Metal

81	Brouillard, William	Ceramics
82	Brown, Ann	Visual
83	Brown, Debra	Painting
84	Brown, Malcolm	Painting
85	Brown, Marquita	Mixed Media
86	Bruch, Bob	Ceramics
87	Brunner, David	Drawing
88	Buckley, Denise	Visual
89	Budgett, Greg	Drawing
90	Burdzinski, Ryan	Painting
91	Buszkiewicz, Kathy	Crafts
92	Butler, Catherine	Crafts
93	Butler, Vanessa	Design
94	Buttram, David	Painting
95	Byrne, Johnine	Mixed Media
96	Cagen, Steve	Photography
97	Cain, Chelsey	Design
98	Calicchia, Giancarlo	Sculpture
99	Callaghan, Timothy	Painting
100	Camara, Astu	Mixed Media
101	Campanella, Antonia	Ceramics
102	Campbell, Brittany	Mixed Media
103	Campbell, Shirley Aley	Visual
104	Capuano, Nicolette	Painting
105	Carlson, John	Mixed Media
106	Carruth, Linda	Drawing
107	Carter, Beverly	Design
108	Caruso, Dale	Photography
109	Casey, Amy	Painting
110	Casiano, Bruno	Visual
111	Castellanos-Lara, Hector	Visual
112	Cawley, Joseph	Painting
113	Centuori, Darrelle	Visual
114	Cesen, Dustin	Design
115	Chanel, Ciera	Drawing
116	Channing, Laurence	Drawing
117	Chilcote, Katherine	Painting
118	Chill, William	Painting
119	Chin, Grace	Metal
120	Chipchak, Michael	Mixed Media
121	Christoff, Michael	Design

122	Christopher, Angela	Painting
123	Chwast, Seth	Painting
124	Ciccotti, Gretchen	Jewelry
125	Cintron, Nancy	Visual
126	Cirino, Virginia	Printmaking
127	Clark, Jim	Wood
128	Clark, Terry	Plastic
129	Cliffel, Kristen	Crafts
130	Cliffel, Martha	Visual
131	Coffman, Joyce	Painting
132	Cole, Tom	Metal
133	Coleman, Larry	Photography
134	Coleman, Shyvonne	Crafts
135	Coleman, Thurston	Photography
136	Comella, Chris	Design
137	Cooper IV, Munroe W.	Photography
138	Cooper, Lane	Visual
139	Cooper-Asberry, Deborah	Ceramics
140	Cooperman, Laura	Drawing
141	Covinne, Cory	Painting
142	Craig, Katrina	Crafts
143	Craig, Stephanie	Ceramics
144	Creed, Anne	Plastic
145	Crisci, Rosemary	Paper
146	Critchlow, Jane	Photography
147	Cross, Susan	Ceramics
148	Culler, Rene	Glass
149	Cunningham, Rozenia	Visual
150	Curen, Paul Van	Photography
151	Curlowe, Andy	Mixed Media
152	Cutri, Stephen	Photography
153	Czybra, Michael	Visual
154	D'Alessandro, Laura	Visual
155	D'Amato, Charity	Design
156	Damiani, Linda	Design
157	Danko, Susan	Painting
158	Daubert, Melissa	Mixed Media
159	Davillier, Valence	Photography
160	Davis, William	Photography
161	Dawkins, Haras	Visual
162	Dawson, Rich	Photography

163	Denk-Leigh, Maggie	Mixed Media
164	Depew, Dana	Sculpture
165	DePolo, JoAnn	Visual
166	Derr, Thomas	Sculpture
167	Derrick, Tony	Photography
168	DeSantis, Gina	Ceramics
169	Dewey, Ryan	Mixed Media
170	Dibble, Matt	Visual
171	DiGiorgio, Nick	Crafts
172	Dim, Laura	Jewelry
173	DiMaio, Eleni	Ceramics
174	Disantis, Dian	Painting
175	Dixon, Darby	Design
176	Dolin, Bonnie	Painting
177	Doncevic, David	Visual
178	Doran, Patrick	Mixed Media
179	Dorsey, Eileen	Painting
180	Dorsey, Mary	Mixed Media
181	Doyle, Monica	Mixed Media
182	Drake, Bette	Ceramics
183	Drozda, Donna, Iona	Painting
184	Drummond, Carol	Design
185	Dryer, Darlene	Sculpture
186	Dujmovic, Tina	Fiber/Textiles
187	Dull, Megan	Ceramics
188	Dumas, William	Photography
189	Dumm, Gary	Drawing
190	Dumm, Laura	Painting
191	Dunlap, Denise	Visual
192	Durr, Bethany	Mixed Media
193	Durr, Robb	Sculpture
194	Durr, Russ	Drawing
195	Durrah, Richard	Photography
196	Durst, Terry	Sculpture
197	Dwight, Gordon	Metal
198	Dykema, Jennifer Linston	Sculpture
199	Edwards, Bruce	Printmaking
200	Eisenberg, Barbara	Printmaking
201	Elswick, Rita	Photography
202	Elswick, Sarah	Photography
203	Emery, Elizabeth	Sculpture

204	Engle, Kimberly	Painting
205	English, Dee	Fiber/Textiles
206	Epstein, Gene	Sculpture
207	Ezzelle-Patton, Virgie	Visual
208	Fallon, Pat	Painting
209	Fannin, Phyllis	Mixed Media
210	Farinacci, Marilyn	Painting
211	Feldman, Jamie	Design
212	Felldman, Emily	Crafts
213	Fields, Patti	Crafts
214	Finley, Jeff	Design
215	Finley, Kelly	Painting
216	Finley, Ruth	Mixed Media
217	Fitch, Sue	Visual
218	Fitzgerald, Owen	Drawing
219	Fitzpatrick, Molly	Design
220	Flowers, Ryan	Visual
221	Fontecchio, Carla	Drawing
222	Forbes, Marci	Mixed Media
223	Forsyth-Bowley, Alice J.	Jewelry
224	Forsyth-Bowley, Barbara A.	Jewelry
225	Foster, Owen	Mixed Media
226	Franklin, Kenyatta	Mixed Media
227	Fraser, Colleen	Crafts
228	Frazier, Susie	Other
229	French, Chris	Mixed Media
230	Froerer, Renee	Mixed Media
231	Frontini, Thomas	Painting
232	Fuchs, Al	Photography
233	Gaier, Rosalyn	Printmaking
234	Gardner, Anita	Plastic
235	Garth, Gwendolyn	Mixed Media
236	Gazala, Mona	Mixed Media
237	Gearhart, Fred	Sculpture
238	Gelvin, Derek	Sculpture
239	Gent, Hilary	Painting
240	Goldstone, Linda	Ceramics
241	Gonzalez, Gabriel	Photography
242	Goode, Dale	Photography
243	Goodill, Michael	Photography
244	Gorell, Zachary	Glass

245	Gortz, Keri	Painting
246	Goss, Gretchen	Metal
247	Goss, Scott	Glass
248	Goto, Yumiko	Ceramics
249	Gotsch, Jason	Sculpture
250	Gotte, Barry G	Printmaking
251	Gould, William	Design
252	Grantham, Dan	Sculpture
253	Gray, Christy	Design
254	Gray, Michele	Metal
255	Green, Amy	Crafts
256	Green, Linda D.L.	Mixed Media
257	Green, Sharlene	Visual
258	Greenspan, Susan	Mixed Media
259	Greenwald, Michael	Painting
260	Gregg, Lisa	Design
261	Grella, Dustin	Visual
262	Griffin, Helen	Painting
263	Grossetti, Jeanne	Mixed Media
264	Grossman, Valerie	Crafts
265	Grubaugh, Derek	Visual
266	Gruss, Drew	Visual
267	Gulan, Nicholas	Mixed Media
268	Gulyas, John	Metal
269	Gurko, Anne-Marie	Design
270	Gutter, David	Photography
271	Haddad, Jamey	Ceramics
272	Haehn, Ben	Printmaking
273	Haggerty, Patrick	Painting
274	Hahn, Meredith	Design
275	Haines, Alexander	Crafts
276	Halbrooks, Nancy	Painting
277	Haldiman, Tina	Glass
278	Hamilton, Jack	Mixed Media
279	Hamilton, Neal	Painting
280	Hanimagi, Kati	Printmaking
281	Hanson, Michael	Mixed Media
282	Harmon, Thomas	Visual
283	Harrell, Wesley	Photography
284	Harrill, Anne	Design
285	Harris, Baba Jubal	Crafts

286	Hartung, Mark	Metal
287	Harvey, Don	Painting
288	Hatten, Kelly	Mixed Media
289	Haviland-Carey, Rebecca Star	Drawing
290	Haynes, Billy	Sculpture
291	Headd, Katrice	Mixed Media
292	Hearn, Richard	Photography
293	Heinen, Lee	Painting
294	Herbold, Laurel	Mixed Media
295	Herring, Clifford	Design
296	Hess, Derek	Mixed Media
297	Hicks, Jon	Design
298	Higgins, Marti	Visual
299	Hill, Freddy	Wood
300	Hill, Jon	Crafts
301	Ho, Jeanetta	Mixed Media
302	Hoak, Todd	Visual
303	Hoffman, Barry	Visual
304	Hoffman, Ben	Mixed Media
305	Hoffman, Teresa	Mixed Media
306	Hollern, Matthew	Metal
307	Hollins, Mary Warren	Visual
308	Hoover, Sara	Mixed Media
309	Hopkins-Bey, Chester	Mixed Media
310	Horne, Christopher	Mixed Media
311	Howell, Richard	Mixed Media
312	Hoxha, Nora	Design
313	Hoyle, Madeline	Fiber/Textiles
314	Hrbeck, Noah	Visual
315	Huryn, Nina	Fiber/Textiles
316	Ina, Halim	Photography
317	Ina, Michel	Design
318	Inglis, Mark	Visual
319	Itomlenskis, Larissa	Mixed Media
320	Ivey, Jeffery	Photography
321	James, Earl	Crafts
322	James, Terral	Crafts
323	Janan, Jala	Visual
324	Jasinski, Brian Andrew	Design
325	Jean, Will	Mixed Media
326	Jewell-Kett, Karen	Design

327	Jo, Toles, Mary	Photography
328	Johnson, Harris	Painting
329	Johnson, Phil	Photography
330	Johnson, Randell	Visual
331	Johnson-Davis, Lorraine	Painting
332	Joki, Andrea	Drawing
333	Jones, Flesh	Visual
334	Jones, Jennie	Photography
335	Jonsson, Hildur	Mixed Media
336	Joyce-Deegan, Patricia	Drawing
337	Juaire, Ray	Visual
338	Juhasz, Brandon	Visual
339	Kabot, Sarah	Mixed Media
340	Kadas, David	Painting
341	Kaiser, Cristina, Bruce	Drawing
342	Kalberer, Lori	Glass
343	Kaletta, Andrew	Mixed Media
344	Kandel, Neal	Crafts
345	Kanner, Larry	Mixed Media
346	Kanter, Jodi	Fiber/Textiles
347	Kaplan, Mike	Glass
348	Kaplan, Wally	Painting
349	Kapp, Cathryn	Drawing
350	Kappa, Beth	Mixed Media
351	Kasperek, Larry	Photography
352	Kato, Mimi	Visual
353	Keehn, Tamarie	Photography
354	Keffer, Mark	Painting
355	Kella, Lori	Photography
356	Kelley, Christopher	Mixed Media
357	Kelley, Millicent	Mixed Media
358	Kellner, Marilyn	Design
359	Kelly, Alex	Visual
360	Kelly, Brendan	Drawing
361	Kelsey, Mary	Visual
362	Kenion, Lisa	Sculpture
363	Kent, Latoya	Mixed Media
364	Kesselem, Andrew	Mixed Media
365	Kiderman, Alice	Sculpture
366	Kilbane, Dinora	Mixed Media
367	King, Drew	Painting

368	Kmieck, Anne	Mixed Media
369	Knerem, Steve	Drawing
370	Knox, Danny	Ceramics
371	Knox, Gary	Photography
372	Kocar, George F.	Painting
373	Koehn, Norbert	Sculpture
374	Köhn, Aaron	Painting
375	Koly, Emily	Ceramics
376	Konst, Chelsea	Design
377	Kopka, Deborah	Drawing
378	Kordic, Stanka	Painting
379	Koukhanova, Irina	Sculpture
380	Kozmon, George	Visual
381	Kraft, Hank	Photography
382	Kramer, Gerry	Visual
383	Kray, Erin	Visual
384	Kretsch, Ron	Design
385	Krispinsky, Todd	Mixed Media
386	Krost, J.B.	Painting
387	Krost, Joyce	Painting
388	Krueger, Becky	Mixed Media
389	Kugenieks, Sandra	Ceramics
390	Kujawski, Mario	Mixed Media
391	Kumura, Margaret	Visual
392	Kurtz, Nicole	Sculpture
393	La, Valle, Vanessa	Photography
394	Lachina, Timothy	Photography
395	Lacy, Chadd	Glass
396	Lane, Darrell	Visual
397	Langan, Mark	Sculpture
398	Langman, Kivin	Mixed Media
399	Lanzaretta, Lindy	Other
400	Lapso, Kathleen M.	Crafts
401	Laquidari, Janet	Design
402	LaQuidari, Vincent	Mixed Media
403	Laszczynski, Melinda	Painting
404	Lawrence, Deb	Painting
405	Lazer, Honey	Photography
406	Leblond, Andrea	Ceramics
407	Lee, Angelia	Painting
408	Lee, Lizzy	Design

409	Leeper, Charron	Design
410	Letman, Chappelle	Visual
411	Letostak, John	Drawing
412	Levin, Daniel	Photography
413	Lewandowski, Amy	Visual
414	Lewis, Garner	Visual
415	Lewis, Rickey	Visual
416	Ling, Donna	Design
417	Lipscomb, Stephanie	Visual
418	Litton, Baila	Painting
419	Litzinger, Haley	Mixed Media
420	Liveges, Christine	Design
421	Loderstedt, Michael	Printmaking
422	Lofton, Lynne Norwood	Ceramics
423	Lois, Martha	Design
424	Long, Dennis	Visual
425	Long, Zak	Mixed Media
426	Loreta, Janice	Mixed Media
427	Lotkovich, Robin	Mixed Media
428	Lovejoy, Carla	Photography
429	Lovelace, Michelangelo	Painting
430	Lowry, Jeanera	Mixed Media
431	Lucak, Douglas	Photography
432	Ludwig, Billy	Mixed Media
433	Lukacsy, Allison	Crafts
434	Luken, Nancy	Design
435	Lyles, Julius	Visual
436	Lynn, Kathy	Mixed Media
437	Lynn, Christopher	Visual
438	Mackey, Rebecca	Crafts
439	Madison, Robert	Design
440	Maher, Terre	Drawing
441	Mahon, Wendy E.	Mixed Media
442	Major, Katie	Design
443	Mangan, Marianne	Photography
444	Manka, Stephen	Visual
445	March, James	Painting
446	Marcis, Andrew	Mixed Media
447	Marincil, Rose	Photography
448	Marksz-Wright, Diane	Jewelry
449	Marmolya, Gary	Photography

450	Martin, Greg	Visual
451	Martin, Stacey	Visual
452	Maschke, Robert	Design
453	Massena, James March	Painting
454	Mastroianni, Steven	Photography
455	Mathews, Marty	Design
456	Matthews, Eric	Visual
457	Matzen, Rolf	Crafts
458	Mauersberger, Christine	Mixed Media
459	Mauersberger, George	Drawing
460	Maugans, Liz	Printmaking
461	Mayen, Valerie	Design
462	McChrystal, Joe	Painting
463	McCord, Wanda Fay	Drawing
464	McEntee, Nancy	Photography
465	McGee, Nicole	Mixed Media
466	McKeown, Dru	Design
467	McNamara, Michael	Painting
468	Meade, Pat	Mixed Media
469	Meier, Mike	Visual
470	Mendes, Jenny	Ceramics
471	Mettee, Kim	Jewelry
472	Meyer, Eric	Metal
473	Miklowski, Ikuko	Ceramics
474	Mikula, Michael	Glass
475	Milburn, Jason	Visual
476	Miller, Carin	Jewelry
477	Miller, Frank	Photography
478	Miller, Mary	Painting
479	Mintz, Alan	Visual
480	Mintz, Chuck	Photography
481	Mitchell, Carol Lynn	Mixed Media
482	Monroe, Tanisha	Visual
483	Monroe, Van	Painting
484	Moore, Heather	Jewelry
485	Moore, Emily	Painting
486	Morse, Helene	Ceramics
487	Moskovitz, Mark	Design
488	Mozart, Michael	Visual
489	Muldrow, Michelle	Visual
490	Murphy, Michelle	Painting

491	Musarra, John	Drawing
492	Myers, Byron	Design
493	Nainiger, Billy	Painting
494	Naji, Loren	Visual
495	Nativio, John	Visual
496	Needham, Benjamin	Digital/Electronic
497	Nevadomi, Ken	Visual
498	Newell, Jessica	Visual
499	Newman, Elise	Painting
500	Newyear, Jennifer	Visual
501	Nichols, , Letia	Design
502	Nolan, Ingrid	Design
503	Noon, Kelly	Design
504	Notash, Bijon	Painting
505	Nowak, Joni	Drawing
506	Nowlin, Dustin	Painting
507	O'Brien, Lynn	Painting
508	O'Brien, Trey	Photography
509	O'Grady, Jennifer Visocky	Design
510	Ohl, Carol Brann	Ceramics
511	O'Keeffe, Paul	Sculpture
512	Okey, Shannon	Fiber/Textiles
513	Oldfather, Dana	Painting
514	Olivido, Abe	Mixed Media
515	Omar, John	Wood
516	Oney, Barbara	Mixed Media
517	Onusko, Ann	Painting
518	O'Reily, Matt	Visual
519	Orosz, Greg	Visual
520	Oster, Angela	Mixed Media
521	Palen, Debbie	Design
522	Palumbo, Giuseppe	Photography
523	Pangrace, Meredith	Design
524	Pape, Mark	Fiber/Textiles
525	Pappas, Margaret	Painting
526	Parente, Susan	Mixed Media
527	Parker, Patricia Zinsmeister	Painting
528	Paspalovski, Pete	Design
529	Patton, Julie	Mixed Media
530	Pearl, Stuart	Visual
531	Pekoc, Chris	Mixed Media

532	Perez-Stable, Deborah	Drawing
533	Perkpski, Bob	Photography
534	Perme, Jordan	Crafts
535	Perry, Budv R.	Design
536	Peterson, Erin	Mixed Media
537	Petraneck, Glenn	Photography
538	Philpot, Brian	Mixed Media
539	Pierce, Sarah	Crafts
540	Pinter, Deborah	Visual
541	Piscura, Stephen	Photography
542	Pitts, Jennifer	Glass
543	Placko, Melinda	Visual
544	Plagata, Cindy	Visual
545	Ploenzke, David	Mixed Media
546	Polito, Dan	Metal
547	Polo, Darice	Drawing
548	Posch, Maryann	Jewelry
549	Powers, Leslie	Visual
550	Pownell, Todd	Metal
551	Pozo, Angelica	Ceramics
552	Prendergast, Susan	Crafts
553	Printz, Bellamy	Printmaking
554	Prioletti, Matthew	Design
555	Proffer, Arabella	Mixed Media
556	Pruitt, Daniel	Glass
557	Qadir, Qandle	Metal
558	Quarles, Derrick	Visual
559	Quinn, John	Photography
560	Radawec, William	Painting
561	Radenkov, Zivko	Wood
562	Radgowski, Elizabeth	Mixed Media
563	Radivoyevitch, Liz	Design
564	Radke, Scott	Visual
565	Rafalke, Christine	Photography
566	Rakoff, Penny	Design
567	Ranally, John	Sculpture
568	Ray, Ollie	Glass
569	Rea, Mel	Visual
570	Reach, Andrew	Visual
571	Reagh, Melissa	Visual
572	Reeves, Ellen	Painting

573	Regan, Jeanne	Visual
574	Reid, Butler	Visual
575	Renee, Sharie	Design
576	Reyes, Alena	Visual
577	Rhinehart, Jesse	Painting
578	Rhinehart, Story	Sculpture
579	Ricchiuto, Cis	Design
580	Richard, Bess Rodriguez	Mixed Media
581	Richards-Davis , Nancy	Other
582	Richardson, Hollis	Painting
583	Ricketti, Guy-Vincent	Mixed Media
584	Rippert, Eric	Photography
585	Ritz, Robin A.	Mixed Media
586	Rivera-Resto, John	Mixed Media
587	Roach, Bobbie J.	Visual
588	Robinson, Lasaundra	Visual
589	Robinson, Nicole	Mixed Media
590	Roetzel, Emily	Crafts
591	Rogers, Walter	Painting
592	Romanik, Michael	Metal
593	Rosen, Debra	Crafts
594	Ross, Louis	Visual
595	Rossino, Thom	Visual
596	Rothenfeld, Daniel	Painting
597	Rozewski, Richard	Visual
598	Russell, Scott	Mixed Media
599	Ryan, John	Painting
600	Ryan, Maureen	Drawing
601	Sabino, Georgio	Mixed Media
602	Saloman, Judith	Ceramics
603	Sammon, Lauren	Mixed Media
604	Sanchez, Will	Mixed Media
605	Sanderson, Doug	Painting
606	Sanderson, Douglas	Visual
607	Sanderstorm, Karen	Design
608	Sandiford, Rodrick	Mixed Media
609	Sarama, Brian	Ceramics
610	Sarnelle, Nina	Mixed Media
611	Scaparotti, Susan	Design
612	Scaravilli, Anthony	Photography
613	Scaravilli, Charles	Digital/Electronic

614	Schmidt, Jerry	Sculpture
615	Schneider, Patricia	Crafts
616	Schonberg, Lisa	Printmaking
617	Schrader, Jeff	Design
618	Schuenemann, Rita	Painting
619	Schuster, Paul	Painting
620	Schwartz-Katz, Nancy	Mixed Media
621	Shaffer, Kurt	Photography
622	Shafron, David	Crafts
623	Shutek-Jackson, Deborah	Drawing
624	Simmons, Andrew	Crafts
625	Simmons, Jennifer	Photography
626	Simon, David	Drawing
627	Sinbondit, Amy	Ceramics
628	Sinbondit, Sai	Design
629	Skarupa, Joy	Crafts
630	Skerritt, Kathy	Mixed Media
631	Skizenta, Lorelei	Mixed Media
632	Skoczen, Susan	Jewelry
633	Skully, Frank	Design
634	Slaby, David	Design
635	Slaby, Keith	Painting
636	Slankard, Mark	Photography
637	Slawson, Corrie	Mixed Media
638	Sliwinski, Kim	Mixed Media
639	Smith, Lisa	Mixed Media
640	Smith, Niki	Drawing
641	Smoloff, Barbara	Mixed Media
642	Smotzer, Heather	Jewelry
643	Sneed, Erinn	Design
644	Sobota, Paul	Visual
645	Soderberg, Kimberly	Painting
646	Sot, Janine	Photography
647	Spear, Michael	Photography
648	Spencer, Charmaine	Sculpture
649	Spyke, Larry	Metal
650	Squires, Susan	Painting
651	Stafford, Mary	Mixed Media
652	Stagney, Kathleen	Glass
653	Stanczak, Barbara	Visual
654	Stern, Bob	Mixed Media

655	Stevenson, Ra	Visual
656	Steward, Darius	Visual
657	Stewart, Tammy	Drawing
658	Stibich, Scott	Sculpture
659	Stilletto, Quinn	Mixed Media
660	Streeter, Robert	Glass
661	Sudduth, Mark	Glass
662	Sudduth, Mark J.	Glass
663	Sullivan, Craig	Mixed Media
664	Summanen, Grace	Visual
665	Suntala, Jeff	Drawing
666	Swann, Donald	Photography
667	Sweet, Marsha	Painting
668	Sydorenko, Paul	Mixed Media
669	Szalkowski, Jennifer	Glass
670	Tapie, Alexandra	Mixed Media
671	Tatar, Steven	Mixed Media
672	Taus, Mark	Glass
673	Taus, Sherri	Glass
674	Taxel, Barney	Photography
675	Taxel, Ezra	Design
676	Taylor, E.D.	Other
677	Telaak, Rita	Jewelry
678	Thrope, Kim	Painting
679	Thurmer, Robert	Visual
680	Tighe, Anita	Crafts
681	Tolfo, Ashley	Photography
682	Tousley, Mindy	Mixed Media
683	Tranberg, Dan	Painting
684	Tsombé, Tshombé	Mixed Media
685	Turner, Augustus	Painting
686	Tyree, Tim	Visual
687	Umbenhour, Susan	Visual
688	Underwood, Barry	Photography
689	Utter, Douglas Max	Visual
690	Vandevier, Lauren	Visual
691	VanLear, Robin	Mixed Media
692	Varzelle, Patrice	Visual
693	Vasquez, José	Drawing
694	Vaughn, Eric	Photography
695	Venditti, Damian	Sculpture

696	Verhoff, Chad	Metal
697	Versillee, S.C.	Painting
698	Versillee-Brown, Sequoia	Painting
699	Vesely, Lawrence	Visual
700	Vincent, Susan	Printmaking
701	Wagner, Jeffrey	Wood
702	Wagner, Mark	Sculpture
703	Walker, Karen	Visual
704	Wallace, Michael	Mixed Media
705	Waltzer, Garie	Photography
706	Washington, Gina	Mixed Media
707	Watson, Royden	Painting
708	Wawrytko, Mary	Glass
709	Wayne, Jonathan	Photography
710	Weider, Garrett	Mixed Media
711	Weil, Sheila	Mixed Media
712	Weinberg, Carol	Jewelry
713	Welsch, Hannah	Design
714	Wetzler, Robert H.	Photography
715	White, Jerome	Painting
716	Whitten, Jennifer	Mixed Media
717	Widen, Katherine	Painting
718	Wiggins, Matthew	Design
719	Wiggins, Nan	Design
720	Wiley, McKinley	Photography
721	Wilkins, Shari	Visual
722	Williams, Bobby	Visual
723	Williams, Gary	Visual
724	Williams, Vickie	Painting
725	Williamson, David	Ceramics
726	Williamson, Roberta	Metal
727	Willis, Mark	Visual
728	Wilmore, Deondra	Design
729	Wilson, Michael	Design
730	Winans, Brock	Printmaking
731	Woideck, George	Ceramics
732	Wood, Linda	Visual
733	Woods, Douglas	Mixed Media
734	Woods, Nikki	Visual
735	Wu, Johnny	Mixed Media
736	Yanak, Jamie-Andrea	Photography

737	Yasenchack, Mark	Ceramics
738	Yeager, Lauren	Mixed Media
739	Yezbak, Joseph	Mixed Media
740	York, Joshua	Mixed Media
741	Young, Brent Kee	Glass
742	Yurich, Elizabeth	Mixed Media
743	Yusko, Stephen	Metal
744	Zamir, Gadi	Visual
745	Zarobell, Richard	Metal
746	Zeleny, Tyler	Visual
747	Ziegler, Mata	Painting
748	Zielski, Chris	Metal
749	Ziemska, Olga	Sculpture
750	Zilka, Colette	Ceramics
751	Zimmer, Evie	Visual
752	Zinsmeister, Paula	Printmaking
753	Zipporah, Zena	Mixed Media
754	Zmarzlt, Edward	Visual
755	Zmina, Linda	Crafts
756	Zodnik, Lucy	Mixed Media
757	Zurchin, Cat	Jewelry

Appendix A.21: Directory of Galleries, Shops, & Studios

	Name	Type
1	1point618	Art Gallery
2	Abrash Gallerie	Art Gallery
3	Agape: Gallery for Good	Art Gallery
4	All Matters Gallery	Art Gallery
5	Artefino Art Gallery Café	Art Gallery
6	Artisan Gallery	Art Gallery
7	Arts Collinwood Gallery	Art Gallery
8	ArtsEgallery	Art Gallery
9	Azure Stained Glass Studios	Art Gallery
10	Brandt Gallery	Art Gallery
11	Breakneck Gallery	Art Gallery
12	Cleveland Print Room	Art Gallery
13	Cleveland State University Art Gallery	Art Gallery
14	Contessa Gallery	Art Gallery
15	Convivium33 Gallery	Art Gallery
16	Corcoran Fine Arts & Appraisals	Art Gallery
17	Dead Horse Gallery	Art Gallery
18	Dick Kleinman Fine Art Gallery	Art Gallery
19	Doubting Thomas Gallery	Art Gallery
20	Fawick Art Gallery	Art Gallery
21	Forst Gallery	Art Gallery
22	Fra Angelica Gallery & Studio	Art Gallery
23	Galeria Quetzal	Art Gallery
24	Geastures Gift Shop and Gallery	Art Gallery
25	Heights Arts Gallery	Art Gallery
26	Jackson Galleries	Art Gallery
27	Juma Gallery	Art Gallery
28	Kenneth Paul Lesko Gallery	Art Gallery
29	La Lanterna Gallery and Café	Art Gallery
30	Lake Erie Artists Gallery	Art Gallery
31	Lee Hayden Gallery	Art Gallery
32	Local Girl Gallery	Art Gallery
33	Loren Naji Studio Gallery	Art Gallery
34	Negative Space	Art Gallery
35	Opus Gallery	Art Gallery
36	Paul Duda Gallery	Art Gallery
37	Pennello Gallery	Art Gallery
38	Pentagon Gallery and Frame	Art Gallery

39	Piccadilly's Fine Art Galleries	Art Gallery
40	Proximity Gallery	Art Gallery
41	Red Space	Art Gallery
42	Reinberger Galleries	Art Gallery
43	River Gallery	Art Gallery
44	Rotten Meat Gallery	Art Gallery
45	Shaheen Modern and Contemporary Art	Art Gallery
46	Something Different Gallery	Art Gallery
47	SPACES	Art Gallery
48	Space: ROCK	Art Gallery
49	Survival Kit	Art Gallery
50	Tara Siebel Art Gallery	Art Gallery
51	The Art Gallery	Art Gallery
52	The Framer's Gallery	Art Gallery
53	The Mezzanine Gallery	Art Gallery
54	Thomas R. Riley Galleries	Art Gallery
55	Verne Collection of Japanese Art	Art Gallery
56	Wasmer Gallery at Ursuline College	Art Gallery
57	Waterloo 7 Gallery	Art Gallery
58	Wobblefoot Gallery	Art Gallery
59	Wolfs	Art Gallery
60	The Bonfoey Gallery	Art Gallery
61	William Busta Gallery	Art Gallery
62	Aspire Auctions	Auction House
63	Rachel Davis Fine Arts	Auction House
64	All Things for You	Shop
65	Aperture	Shop
66	Artful Living Boutique	Shop
67	Banyan Tree	Shop
68	CLE Clothing Co.	Shop
69	Driftwood Gallery	Shop
70	Duo Home	Shop
71	Esperanza Threads	Shop
72	Evie Lou	Shop
73	Fine Points, Too	Shop
74	Heartstrings	Shop
75	J and C Glass Studio	Shop
76	Keller Art Glass Studio	Shop
77	M. Gentile Studios	Shop
78	Native Cleveland	Shop
79	Pinky's Daily Planner	Shop

80	Reincarnation Vintage Design	Shop
81	Rene Culler Glass LLC	Shop
82	Room Service	Shop
83	The Dancing Sheep	Shop
84	TurnStyle Boutique	Shop
85	Waterloo Studios	Shop
86	Yellowcake Shop	Shop
87	Keller Art Glass Studio	Studio
88	M. Gentile Studios	Studio
89	Superior Hot Glass	Studio
90	Lee Heinen Studio	Studio
91	Laura Chapman Studio	Studio
92	Phyllis Seltzer Studio	Studio
93	Benchmark Glass Art Studio	Studio
94	Scaravilli Design and Studio Gallery	Studio
95	DeSapri DeSign Studio	Studio
96	Kathy Lynn Fine Art	Studio
97	Koehn Sculptors	Studio
98	Waterloo Studios	Studio
99	Tricia Kaman Art Studio and Gallery	Studio
100	J and C Glass Studio	Studio
101	Play-Haus Design	Studio

Note: Only confirmed establishments included. Portrait studios, archives, and unclassified/defunct establishments were also removed.

Appendix A.22: Directory of Arts Organizations

	Name	Lexis Nexis	Hoover's	Guidestar
1	Cleveland Museum of Art	Yes	Yes	Yes
2	Museum of Contemporary Art Cleveland	Yes	Yes	Yes
3	Artist Archives of the Western Reserve			Yes
4	Western Reserve Historical Society	Yes	Yes	Yes
5	Shaker Historical Society	Yes	Yes	Yes
6	Transformer Station			
7	Ukrainian Museum-Archives	Yes	Yes	Yes
8	Maltz Museum of Jewish Heritage	Yes	Yes	Yes
9	Virginia Marti College	Yes	Yes	Yes
10	Case Western Reserve University - Dept. of Art	Yes	Yes	Yes
11	Baldwin Wallace University	Yes	Yes	Yes
12	Norte Dame College - Art Department			
13	Ursuline College	Yes	Yes	Yes
14	Cleveland Institute of Art	Yes	Yes	Yes
15	Cleveland State University - Art Department	Yes	Yes	Yes
16	Cleveland Urban Design Collaborative			
17	Cleveland School of the Arts	Yes	Yes	Yes
18	Broadway School of Music and The Arts	Yes		Yes
19	Beck Center for the Arts	Yes	Yes	Yes
20	Young Audiences Inc.			Yes
21	Rainey Institute			Yes
22	BAYarts			Yes
23	Orange Art Center	Yes	Yes	
24	Brecksville Center for the Arts	Yes		Yes
25	Morgan Art of Papermaking	Yes		Yes
26	Valley Art Center		Yes	Yes
27	Mandel JCC - Arts and Culture			Yes
28	Shore Culture Center			
29	Heights Arts Collaborative	Yes		Yes
30	Snickerfritz Cultural Workshop for the Arts			Yes
31	Parma Area Fine Arts Council			
32	The Glass Bubble Project	Yes		
33	Progressive Arts Alliance Incorporated	Yes		Yes
34	Art On Wheels	Yes	Yes	Yes
35	Cleveland Print Room			
36	Cudell Improvement Inc.	Yes	Yes	Yes
37	Ohio City Inc.	Yes	Yes	Yes

38	Tremont West Development Corporation	Yes	Yes	Yes
39	University Circle Inc.	Yes	Yes	Yes
40	Detroit Shoreway C.D.O. - Gordon Square	Yes	Yes	Yes
41	Bellaire-Puritas Development Corp.			Yes
42	St. Clair Superior Community Development Corp.			Yes
43	Old Brooklyn Community Development Corp.			
44	Northeast Shores Development Corp.	Yes	Yes	Yes
45	Cedar Fairmount Special Improvement District		Yes	Yes
46	American Institute of Architects Cleveland	Yes	Yes	Yes
47	American Institute of Graphic Arts Cleveland			
48	Northern Ohio Illustrators Society			Yes
49	National Cartoonists Society - Great Lakes			
50	Cleveland Contemporary Chinese Culture Assn.			
51	Westlake Chinese Cultural Association			
52	Cleveland Art Association			Yes
53	The Sculpture Center		Yes	Yes
54	Society for Photographic Education Inc.		Yes	Yes
55	The Chagrin Foundation for Arts and Culture		Yes	Yes
56	Arts Collinwood Inc.	Yes	Yes	Yes
57	SPACES	Yes	Yes	Yes
58	The Red Dot Project (<i>No longer Exists</i>)			
59	Cleveland Artists Foundation	Yes	Yes	Yes
60	Cleveland Arts Prize			Yes
61	Art House Inc.	Yes	Yes	Yes
62	Intermuseum Conservation Association	Yes	Yes	Yes
63	Sankofa Fine Art Plus	Yes	Yes	Yes
64	Foluke Cultural Arts Center	Yes	Yes	Yes
65	Land Studio		Yes	Yes
66	Ohio Arts Council			
67	Art Therapy Studio - MetroHealth	Yes	Yes	Yes
68	Art Therapy - Cleveland Clinic	Yes	Yes	Yes
69	Art Therapy - University Hospitals	Yes	Yes	Yes
70	Zygote Press Inc.	Yes	Yes	Yes
71	Jennings Art Center for Older Adults			
72	City Artists at Work			
73	VSA Ohio (Very Special Arts)			

ⁱ <http://artscollinwood.org/zoetic-walls/>