



REMIX

Cleveland

EXECUTIVE SUMMARY
A MUSIC INDUSTRY STUDY



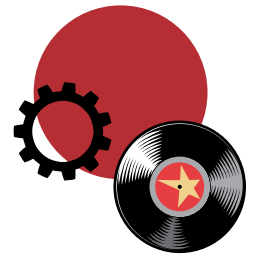
Maxine Goodman Levin
College of Urban Affairs



“Where words fail, music speaks”

- Hans Christian Andersen





EXECUTIVE SUMMARY

This introductory quote speaks of the utility of music, but misses its pervasiveness in the various aspects of our lives. The art of music has contributed significantly to society. Music inspires us to move according to rhythms and express our emotions in keeping to the optimism of Mozart, the energy of Elvis Presley, the creativity of Miles Davis, and the innovativeness of Lady Gaga. Throughout history, music has helped people to worship, win wars, create communities, enhance dialogues, and prompt social change.

From an economic perspective, music is not usually recognized as being influential. In the 1990s and the beginning of the 21st century, the new paradigm of economic growth has emphasized the significance of technological change and validated the importance of creativity to social change and economic development. However, because many people tend to think of music only as an amenity, the usefulness of music as an economic and community development engine is often overlooked.

There is a growing awareness of the economic impact that a creative and entrepreneurial workforce can have on economic outcomes. Art, in all its forms, can provide a region with a “sticky,” or long-lasting, regional competitive advantage that is attractive to creative people. Regions can become commodities sold to people in packages relating the city’s history, arts, and cultural amenities. Despite this newly recognized awareness, the arts generally remain disassociated from the main economic development strategies of regions striving to improve and grow their economies.





About This Report

This study was commissioned by the Community Partnership for Arts and Culture (CPAC) as a starting point for gaining a deeper understanding of the different sectors of the Cleveland arts scene in Cuyahoga County. Its objective is to understand the Cleveland Music Sector, delineate its components, learn its dynamics, and assess the economic impact of music events and venues in Cuyahoga County.

This study was conducted by the Center for Economic Development (“Center”) of the Maxine Goodman Levin College of Urban Affairs at Cleveland State University. The Center sought answers to a set of core research questions regarding the typology and economic impact of the Cleveland Music Sector on the regional economy: What constitutes the music sector in Cuyahoga County? What characteristics help to describe it? What industries and types of products are significant to the vitality of the Cleveland Music Sector? Which unique properties of the Cleveland Music Sector make it thrive and diminish? What are prominent examples of success in the local music scene? What economic impact does the Cleveland Music Sector create on the local economy? Finally, the project was designed to stimulate an interest in the music sector as a unique resource for inclusion into public policy capable of leading to economic prosperity.

The project started in July of 2010 and was completed in June of 2011 with this report. The products of the study include this executive summary, which highlights major findings. A main contribution of this study is a comprehensive framework capturing analyses of the Cleveland Music Sector based on quantitative and qualitative data, and illustrating the music sector across several major dimensions: industrial and occupational structures of the music sector, functional groups of the music sector, for-profit and non-profit entities, inclusion of the amateur sector of the music scene, and capturing the economic impact of all these components,

including major music events in the region.

The findings presented in this executive summary synthesize information provided by all of the detailed analyses, including individual interviews and six case studies.

An in-depth analysis of the Cleveland Music Sector is presented in a full report consisting of nine chapters. Each chapter reflects a stage of the research.

Chapter 1 describes the structure of the Cleveland Music Sector, defines its typology in terms of eight industrial subsectors, analyzes overall employment and wage trends of the music sector as a cluster and the dynamics of its subsectors, analyzes the for-profit and non-profit portfolio of companies in the music sector, and compares the Cleveland Music Sector to music sectors in other regions. These findings are followed by the outcomes of two focus groups conducted in conjunction with this study (Chapter 2), which vetted and enriched the findings of the Cleveland Music Sector’s dynamics with qualitative characteristics of change. Chapter 3 presents the results of the Cleveland Amateur Musician Survey. The major findings of the survey describe the quality of the amateur music scene, compare it to the trends associated with professional musicians, reveal data analyzing the supply and demand of musicians, and provide the costs and incomes associated with music events.

Chapter 4 demonstrates the results of the data-driven analysis on the supply of musicians in the Cleveland Music Sector in comparison to other regions and compares it with the demand for music locally and in other cities. Chapter 5 discusses the music performances that are brought (imported) into the region and music products that are sent out (exported) in Cleveland and comparable metropolitan areas. The quantitative analysis concludes in Chapter 6 with the assessment of the Cleveland Music Sector’s economic impact on the local economy. The impact is assessed using the estimates of employment and expenditures

of major Cleveland music venues in Cuyahoga County and visitor spending on major music events in 2010.

Chapter 7 includes six case studies featuring accomplishments in the Cleveland Music Sector, exemplified by stories of individual musicians and ensembles, music venues, new types of music performances, and undertakings emerging at the cross sections of Cleveland’s strongest sectors, i.e., music and medicine and music and manufacturing. The case studies investigate musicians and venues that capitalized on some regional competitive advantage and became successful in Cleveland. The stories discuss favorable factors that exist in the Cleveland Music Sector, as well as changes to and challenges within the music industry.

Chapter 8 presents the Directories of Musicians and Music Organizations for the Cleveland Music Sector. The directories, although not inclusive of all musicians and music, serve as a snapshot of current performers and venues operating throughout the region in the period from 2009 to 2010. Chapter 9 includes detailed methodologies that emphasize replication of this study across other geographies and other types of art.

In this study, we defined musicians as those who self-identified themselves as belonging to one of two groups: professional musicians or amateur musicians. Professional musicians are defined as those who receive more than 50% of their income from music-related activities; amateur musicians are defined as those who receive less than 50% of their income from music-related activities and are employed in other, non-music sectors. We also analyzed musicians by the major music occupations specified in Chapter 4. Music venues were identified by their association with major music industries and by advertisements on major music websites. Other specific conditions used to identify musicians and music venues and events are detailed in Chapter 9.



¹ Wolff, C. (n.d.). Hello Cleveland: The city's rock and roll legacy. The Rock and Roll Hall of Fame & Museum. Retrieved from http://rockhall.com/story-of-rock/features/all-featured/3326_hello-cleveland/

² Norman, M. (2008, March 7). After a million-dollar renovation, the landmark Brothers Lounge will reopen. Cleveland Plain Dealer.

³ Agora History, <http://www.clevelandagora.com/history.htm>

⁴ See <http://www.tricpresents.com.eyemg.com/wp-content/uploads/Updated-JazzFest-History-for-09.pdf> for more details.

⁵ DeOreo, D. (Producer) and Rosenberger, M. (Executive Producer). (2000, September 29). Around Noon: History of a World Class Orchestra. Narrator, D. Perry. ideastream.

⁶ For more information, please refer to the Encyclopedia of Cleveland History at <http://ech.cwru.edu/index.html>

⁷ Read more on the characteristics of the Cleveland Music Sector cited by local musicians in Chapters 2 and 7.

Music in Cleveland



MUSIC LEGACY

Cleveland has a long history as one of the nation's most thriving music scenes. It is known nationwide for its outstanding classical music venues and as the birthplace of rock and roll, as well as a source of the blues and jazz. Today, Cleveland's music scene has evolved into an eclectic mix of genres due to its musical heritage and historic development as a city. However, the region's richness of musical diversity and distinguished talent is in need of reinforcement in order to put Cleveland back on the map of the national music landscape. Highlights of Cleveland's music legacy emphasize its past renown and the need for the music sector of today to develop strategies that can restore Cleveland's importance as a name in music.

Cleveland's storied musical history dates back to the 1840s when Lowell Mason, the most influential musician of the 19th century, led a series of music workshops in the city. However in the mid-20th century, Cleveland was probably best known for its history as the epicenter of rock and roll's beginnings. It was home to four legendary rock and roll AM radio stations during the 1960s: WIXY, WHK, WERE, and WJW. When WHK moved to FM and converted to free form radio it became WMMS, which was a major player in the rock scene well into the 1990s.¹ The phrase "rock and roll" was coined by Cleveland natives Leo Mintz, owner of Record Rendezvous, and Alan Freed, a deejay for WJW-AM. Freed was also responsible for organizing the Moondog Coronation Ball, the first-ever rock and roll concert, on March 21, 1952. Sixteen thousand tickets were sold for the event at the old Cleveland Arena, a venue that held only 10,000 people.

Cleveland's prominence in the blues music industry is due in large part to renowned venues like the Brothers Lounge, known in its heyday as the "Bastion of Blues in the Cleveland area." The lounge was a mandatory stop on the blues circuit and featured performers including Buddy Guy, B.B. King, Robert Lockwood, Jr., and Bonnie Riatt. The Brothers Lounge underwent a million dollar renovation in 2008 to restore the space.²

Another historic music venue in the greater Cleveland region is the Agora. The Agora

opened in 1966 and over time became a series of clubs that booked national and local musical acts. The club held events known as "Sundays at the Agora," which helped launch a number of national acts including The Grand Funk Railroad, The Outlaws, ZZ Top, Rainbow Canyon, James Gang, Glass Harp, Foghat, and the Raspberries. In pre-MTV days, the Agora also showed rock concerts on a local television station. In the late 1970s, Billboard Magazine rated the Agora as the number one rock club in America.³ The Tri-C Jazz Festival was founded in 1980 to bring jazz music to a wider audience and continues in this tradition today.⁴

While Cleveland is legendary for its blues and rock and roll past, classical music in the city has perhaps even a greater history. The Cleveland Orchestra is one of the most highly regarded symphony orchestras in the world. It was founded in 1918 by local residents, including Adella Prentiss Hughes, the first woman to manage a symphony orchestra. In 1946, the Cleveland Orchestra developed the distinctive sound for which it is known because George Szell, who had recently been instituted as director of the orchestra, wanted the orchestra to function and sound like a chamber group. Don Rosenberg, in *The Cleveland Orchestra Story: Second to None*, described the transformed ensemble as a place where "every musician would be an important part of the texture and they would listen to each other closely and every one would be heard very clearly."⁵ The Cleveland Orchestra's legacy of sound has lasted 65 years, and it continues today.

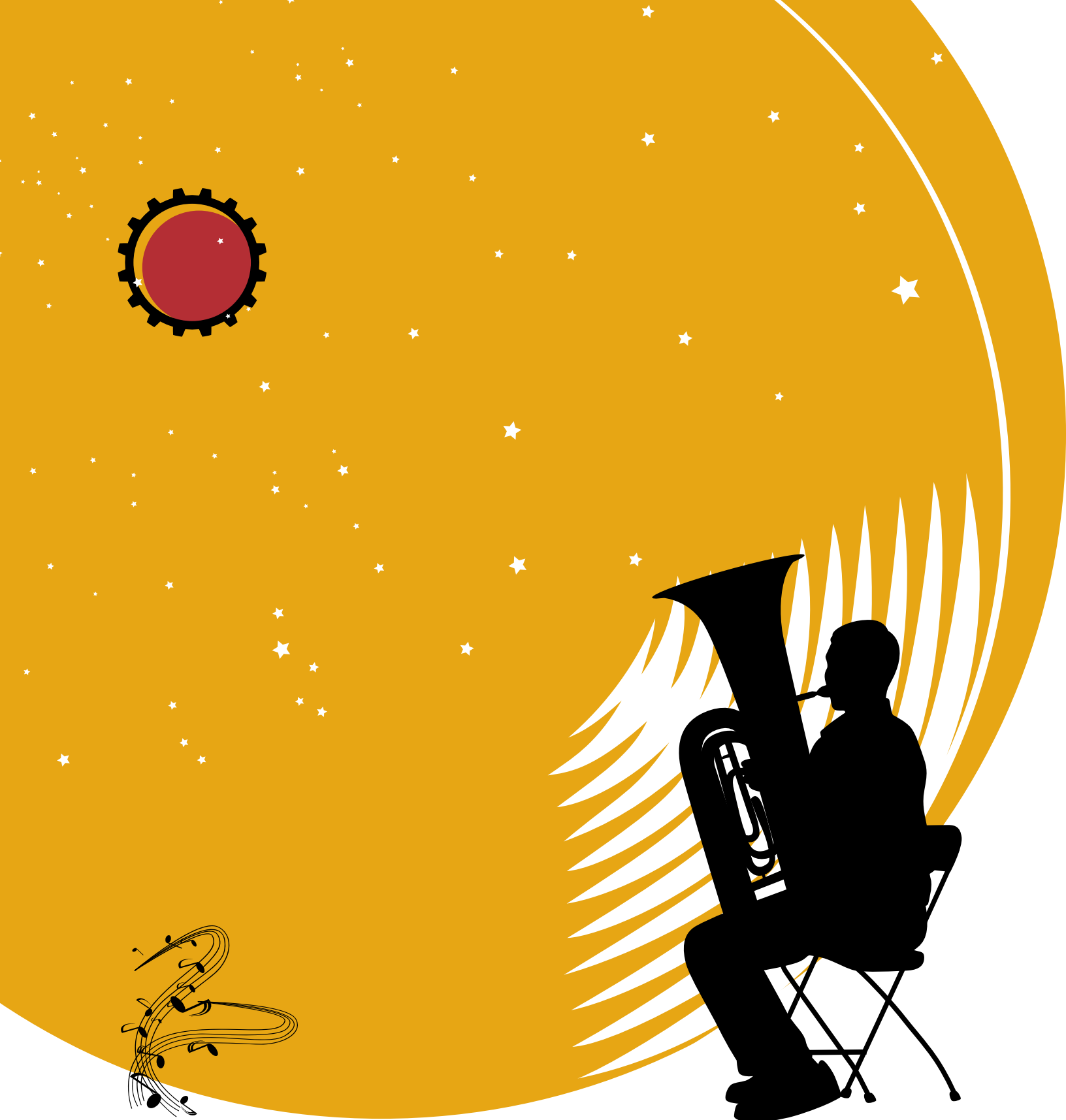
The growth of Cleveland's manufacturing industry in the 19th and 20th centuries attracted diverse groups of immigrants who wove numerous cultural traditions into the city's fabric. Notably, a wealth of world music added to the diversity and eclectic nature of the Cleveland Music Sector and continues to influence the city's musical offerings today. The world music scene in Cleveland spans from polka and salsa to reggae and gospel. Cleveland has been dubbed the "Polka Capital of the World", and was the home of Frankie Yankovic, the "Polka King" who popularized the Slovenian-style of polka. Cleveland's rich gospel history includes the Wings Over Jordan Choir that was

founded in 1935 and was the first full-time professional African-American choir in America.⁶

Mirroring Cleveland's decline from its industrial heyday, the Cleveland Music Sector has also experienced a drop in prominence from the national music scene. However, pinpointing when Cleveland faded from being considered a top American music city is difficult. Today, Cleveland musicians express that outsiders are surprised by their superb skills and depth of performances. Local musicians believe strongly that the overall sense in the Cleveland Music Sector is that "talented artists are from Cleveland, but don't come to Cleveland." This was reflected in comments such as: "Cleveland is a birthplace," and "[you] may be from Cleveland, but work and success is outside of Cleveland." While talent and opportunities do abound in Cleveland, the sector lacks unification on the messaging and organizing fronts, which makes it challenging to dispel negative perceptions of the sector's richness and depth.

Participants of this study noted that outsiders are often surprised when they visit Cleveland and learn firsthand about the rich music scene and culture that exists here. "People are very energetic and passionate about the arts (in Cleveland)," one of the musicians who participated in the study commented. "Cleveland has an unusually sophisticated audience for classical music — larger and more educated than other cities of this size," echoed another. "If people [musicians] would come together, their audiences would expand, opportunities for funding would grow, and [the] world would see Cleveland as a major artistic contributor," noted another participant.

"Pride and musicianship," "abundance of talent," with an "education component [that] is phenomenal across all genres: Jazz, Classical, Rock, R&B, all covered in our universities" — are just a few assertions from the description of the Cleveland Music Sector by local musicians and community leaders. They were not hesitant to add that the Cleveland Music Sector is passionate, under-appreciated, diverse, engaged, and has "incredible potential for entrepreneurship."⁷



⁸ Previous research studies analyzing music sectors have addressed the scope of the sector by identifying musicians and music venues based on industrial and occupational definitions. The Center critically reviewed these methodologies, selected appropriate industries and occupations, and enhanced them by utilizing the Quarterly Census of Employment and Wages database (QCEW, also called the ES202) and the U.S. Bureau of Labor Statistics' Occupational Employment Statistics (OES).

⁹ Due to the fact that the Occupational Employment Statistics data are unavailable at the county level, the geographic boundaries of the Cleveland Music Sector were extended for this portion of the study to include the entirety of the Cleveland-Elyria-Mentor MSA, including Cuyahoga, Geauga, Lake, Lorain, and Medina counties. Read more on the occupational analysis in Chapter 4.

¹⁰ The Center for Economic Development designed a methodology describing an industry-based Cleveland Music Sector by using a computer program capable of identifying music-related industries through keyword searches (Chapters 1 and 9). Using this program, the Center defined the Cleveland Music Sector as encompassing musicians and music venues from 45 unique industry codes in the North American Industry Classification System (NAICS). See Appendix 1-1 for brief descriptions of the 45 NAICS codes included as part of the Cleveland Music Sector's industry-based definition.

¹¹ This study is geographically limited to Cuyahoga County. Some sections' analyses are based on metropolitan areas due to data availability.

¹² All data are inflated to 2009 dollars.

The Cleveland Music Sector Today

THE CLEVELAND MUSIC SECTOR BY OCCUPATIONS

The Cleveland Music Sector was defined and studied using occupational data from the U.S. Bureau of Labor Statistics' Occupational Employment Survey (OES).⁸ The music sector was defined in terms of core music occupations and support music occupations. Core music occupations were identified as music industry workers involved in jobs that result in the creation or performance of music. Support music occupations were identified as music industry workers involved in jobs that do not result in the creation or performance of music.

For the occupational analysis, the music sector was identified as people who work in two core music occupations, Music Directors and Composers and Musicians and Singers. Based on these two occupations, it was determined that the Cleveland-Elyria-Mentor Metropolitan Statistical Area (MSA)⁹ has more Musicians

and Singers than comparable MSAs, namely Cincinnati-Middletown, OH-KY-IN; Columbus, OH; Indianapolis-Carmel, IN; and Pittsburgh, PA. The Cleveland Music Sector had the largest number of Musicians and Singers (500) in 2009 as well as the largest occupational share of music employment to total regional employment (0.05%) compared to the aforementioned MSAs. For every 1,000 people in the greater Cleveland region, at least five are musicians.

Despite having the largest number of Musicians and Singers, the Cleveland-Elyria-Mentor MSA had the smallest number of Music Directors and Composers (40) in 2009 when compared to the other four MSAs. While the Indianapolis-Carmel MSA only had ten more Music Directors and Composers (50), the Pittsburgh MSA had more than four times the number of Music Directors and Composers (170). The Cleveland-Elyria-

Mentor MSA also had the smallest share of music employment to total regional employment (0.004%) when compared to the other MSAs.

Support music occupations include ten unique occupational categories including Agents and Business Managers of Artists, Performers, and Athletes; Art, Drama, and Music Teachers Postsecondary; and Musical Instrument Repairers and Tuners. The Cleveland-Elyria-Mentor MSA employs 8,320 individuals in music support occupations. Compared to the other four MSAs, the Cleveland-Elyria-Mentor MSA has the second smallest number of music support employees, exceeding only the Columbus MSA (7,380). The largest music support employment is found in the Pittsburgh MSA (10,440), followed by the Indianapolis-Carmel MSA (10,270).

THE CLEVELAND MUSIC SECTOR BY INDUSTRIES

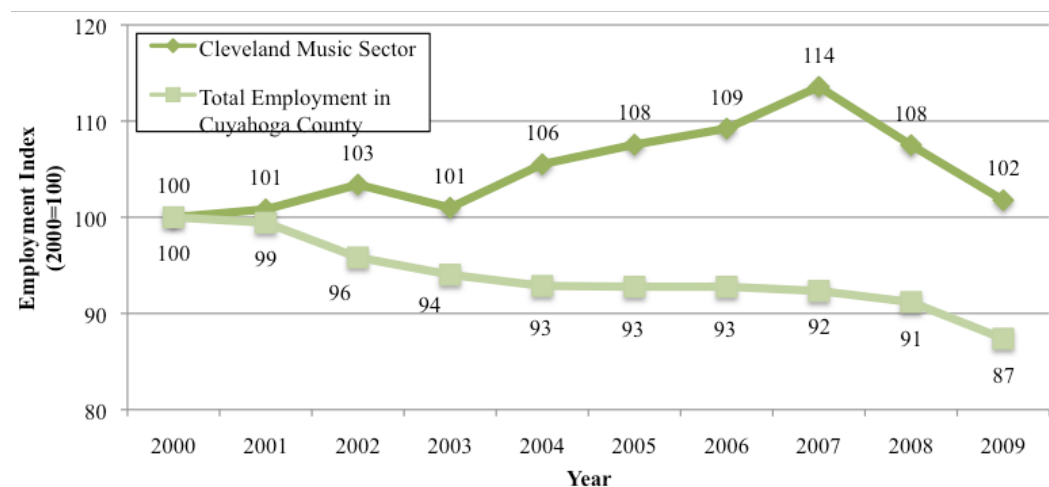
The Cleveland Music Sector was also defined and studied by the industries it encompasses. This industry-based definition allowed the Center to identify 2,718 employees¹⁰ in the Cleveland Music Sector¹¹ in 2009. The size of the music sector remained stable between 2000 and 2009, despite two recent recessions; in fact, employment in the Cleveland Music Sector

increased slightly between 2000 and 2009 (Figure 1). For Cleveland, which was hit harder by recent economic downturns than other similar-sized economies, the stability illustrates the success of music as an economic sector.

The vitality of the Cleveland Music Sector was confirmed by the dynamic of the music sector's

payroll, which increased by a total of \$29.3 million (34.3%) from 2000 to 2009, yielding a total payroll of \$114.8 million in 2009. In addition, the music sector's average wages increased by \$10,224 (31.9%) between 2000 and 2009, producing total average wages of \$42,228 in 2009.¹²

Figure 1: Employment Index of the Cleveland Music Sector and All Industries in Cuyahoga County, 2000-2009



Source: Quarterly Census of Employment and Wages (QCEW)



Although the average wages of people working in the Cleveland Music Sector in 2009 were lower than the average wages of people working in all other industries in Cuyahoga County (\$46,408), anecdotal evidence suggests that part of musicians' income might be unaccounted for in the data. Only 20% of all performing musicians surveyed in this study¹³ indicated they draw all their income from a single job in the music industry. The overwhelming majority of survey respondents across all categories indicated that part of their income comes from private music lessons and performances outside of their primary job. This activity is not captured by the ES202 data,¹⁴ which is based on the records of businesses that have paid employees.

Musicians as well as other art industries are classified in the academic literature as a part of the creative workforce. The creative workforce cluster contributes to their regional economies

more than any other industry cluster including high-technology industries. One of the seminal economic development studies includes arts and culture industries in so-called alpha clusters. John Schoales's research identifies the alpha clusters which include art, culture, fashion, and financial investment industries across Canada and the United States. The alpha cluster is distinguished from other industries by its very short product life-cycle that requires industries to develop and introduce new products continuously.¹⁵ Therefore, success in alpha clusters requires perpetual innovation. Alpha cluster's industries are comprised of highly skilled, creative individuals, who consistently produce new ideas, products and concepts. As mentioned by Ann Galigan, who studies arts and culture workforce dynamics, "quality of the imagination and the creative vision in a search for truth, beauty, and meaning" is at the core of "creativity [that] became an individual gift, not a

collective trait" after the Industrial Revolution.¹⁶ The high skills of workers in this cluster are required for continued innovation, and the skills of workers in this sector are derived from their wealth of creativity, which drives the industry forward at a rapid speed. With wages being a proxy for skills and productivity, the increased level of contribution of the alpha clusters is confirmed by their higher levels of pay as compared to other clusters.¹⁷ The alpha clusters are deeply embedded in their respective regions and impact the speed of innovation within their geography.

The Center created eight subsectors, or groups of industries, within the Cleveland Music Sector that identify major functions of the music cluster. These subsectors are Education & Museums, Manufacturing, Musicians, Promoters, Recording & Publishing, Retail, Service Providers, and Wholesale (Figure 2).¹⁸



¹³ See the comprehensive analysis of the Cleveland Amateur Musician Survey in Chapter 3.

¹⁴ The Ohio Economic Development Information Network (OEDIN), also known as The Ohio ES202 Network, is a statewide network of university centers and researchers. The ES202 database is derived from company level data obtained by each state for unemployment compensation tax collection purposes. Nearly all employers with paid employees are required to file unemployment insurance reports (technically called ES202) to their respective states on a quarterly basis. Cleveland State University, on behalf of the Ohio ES202 Network, receives the data on a quarterly basis from the Bureau of Labor Market Information of the Ohio Department of Jobs and Family Services.

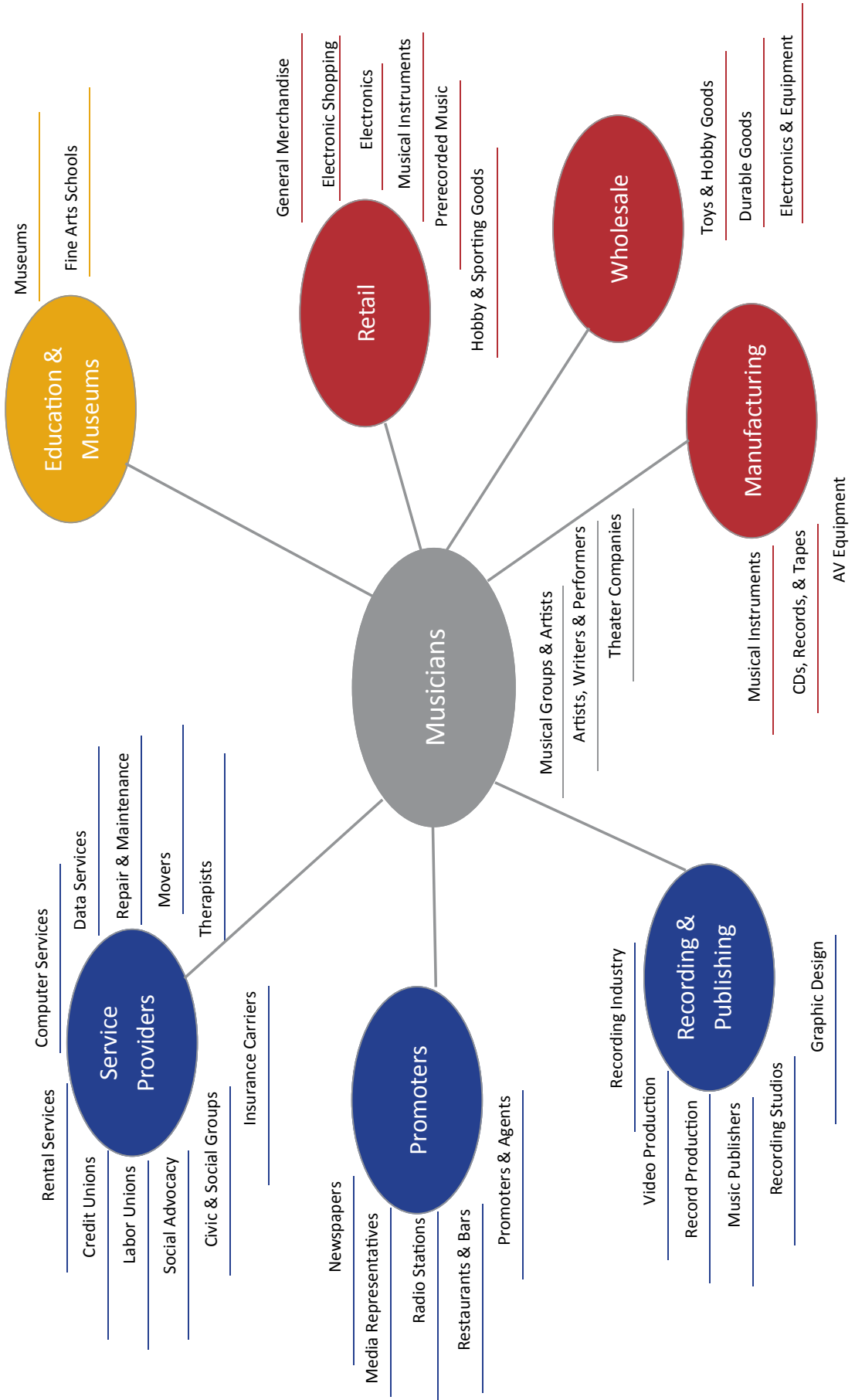
¹⁵ Schoales, John. (2006) Alpha clusters: Creative innovation in local economies. *Economic Development Quarterly* 20(2), 162-177.

¹⁶ Galligan, Ann. (2008) The evolution of art and culture as it relates to workforce dynamics. *The Journal of Arts Management, Law, and Society* 37(4), 345-349.

¹⁷ Schoales, John. (2006) Alpha clusters: Creative innovation in local economies. *Economic Development Quarterly* 20(2), 162-177.

¹⁸ The subsectors of Education and Museums were analyzed together due to the restriction in the ES202 database of disclosing data about individual companies.

Figure 2: Ecology of the Cleveland Music Sector



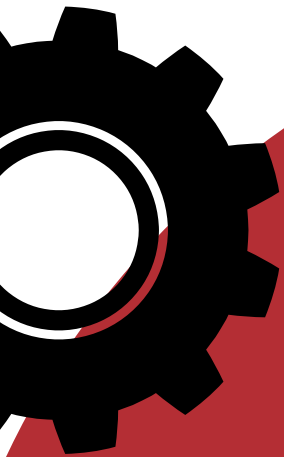
The Musicians subsector is the staple group in a music sector. Its existence justifies the development of all support and supplementary functions performed by other industries. In 2009, this subsector accounted for 378 employees in Cuyahoga County. It declined from 474 employees in 2000 and from 643 workers at its highest point in 2001. The data source used for this analysis undercounted all artists in music industries as it captures only individuals that are officially employed in the industry as full-time

or part-time employees. It does not include any musicians that work on a contractual basis with music establishments, or any self-employed freelance, or amateur musicians.

The Retail subsector was the largest subsector in 2000 and accounted for more than 27% of the Cleveland Music Sector's employment. Along with Promoters and Musicians, Retail constituted the core of the Cleveland Music Sector at the beginning of the millennium; these three

subsectors together represented approximately 68% of total music sector employment. Promoters and Musicians included 24% and 18% of music employment in 2000, respectively.

Although the level of employment within the Cleveland Music Sector was nearly the same in 2000 and 2009, the breakdown by subsector differs between years due to changes in both the music industry and the regional economy. Changes include increased access to the Internet





and digitally-formatted music that significantly altered the way people buy music. Consumers no longer need to travel to local music stores to buy records or instruments, which hinders the growth of the Retail subsector. However, music stores were known not only as music retail outlets, but also as community anchor spaces for music lessons, kids' hangouts, and concerts of amateur and professional musicians. The consolidation and disappearance of music retail creates vacancies for filling in the niche to educate neighborhood children and create public spaces for live music. Compared to 2000, the Retail subsector in 2009 captured only 15% of the Cleveland Music Sector's employment, following the decline of Musicians to 14%. At the same time, the subsector Promoters grew substantially to represent 42% of music employment in 2009.

The subsector Education & Museums is very special in Cleveland. It was strongly emphasized as the Cleveland Music Sector's signature industry in the interviews and focus groups conducted in conjunction with this study. This subsector includes the employment of the Rock and Roll Hall of Fame and Museum, one of the nation's most recognized music institutions and a world-class museum that collects, preserves, exhibits, and interprets the art form through its

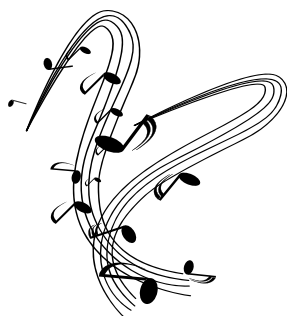
library and archives as well as its educational programs. The subsector grew from capturing 17% of the Cleveland Music Sector's total employment in 2000 to representing 21% of employment in 2009.

The educational component of this subsector captures a core specialty of the Cleveland Music Sector.¹⁹ Cleveland has exceptional formal music education opportunities, outstanding, easily available private lessons, and access to many high-quality music ensembles and orchestras that can serve as places of employment for graduates. The Cleveland Institute of Music, The Oberlin Conservatory of Music, Baldwin-Wallace College's Conservatory of Music, Case Western Reserve University's Department of Music, Cleveland State University's Department of Music, and Cuyahoga Community College's Music Department are the core of the formal music education system in Cleveland and its surrounding region.

In addition to the region's formal music programs, its high quality of private lessons was repeatedly emphasized during the study's interviews. Private teachers are a key part of any music education system, but the private teachers in Cleveland are especially accomplished; several have published books on methods and are

accomplished musicians and composers in their own right. Another unique attribute of Cleveland attractive to many students is the close proximity of an agglomeration of very prominent musicians playing at local venues. Students have unprecedented access to accomplished musicians and are sometimes given the opportunity to play with them in low-key sessions.

The interviews and focus groups conducted for this study revealed a shortfall in the Cleveland Music Sector that is reflected in the data. The lack of sufficient employment in the Service Providers subsector was indicated by interview and focus group participants as a limitation on the successful growth of the Cleveland Music Sector. This subsector lost 101 employees between 2000 and 2009 and decreased its share in the cluster from 6.4% in 2000 to 2.6% in 2009. There was a strong consensus among artists concerning the need for resources for promoting the music business model, financing, and infrastructure organizations. This consensus was voiced alongside an emphasis on the importance of leveraging public funding for the arts, information infrastructure, and non-profit network providers, both with physical and virtual performance spaces.



¹⁹ Although *Education & Museums* became the second largest subsector in 2009 in terms of employment, the reality is that the subsector is larger than what is shown in this study's trend analysis. This variation is due to limitations associated with the study. For instance, defining the Cleveland Music Sector geographically as only Cuyahoga County limited the Center from including in the study educational institutions like Oberlin College that are strongly related to music. In addition, the *Education & Museums* subsector does not contain data for 326 employees, including music teachers working for both local school districts and the music departments at Case Western Reserve University, Cleveland State University, Baldwin-Wallace College, and Cuyahoga Community College. The data on the music departments were obtained from various sources and cannot be added to the ES202 data.



²⁰ *Direct impact* refers to the initial value of goods and services, including labor, purchased by the Cleveland Music Sector within a defined economic region. These purchases are sometimes referred to as the “first-round effect.” *Indirect impact* measures the value of labor, capital, and other inputs of production needed to produce the goods and services required by the music industry (second-round and additional-round effects). *Induced impact* measures the change in spending by local households due to increased earnings by employees working in local industries that produce goods and services for the Cleveland Music Sector and its suppliers.

²¹ Labor Income represents wages paid to employees plus proprietors’ income. All monetary impact assessments are presented in 2011 dollars.

²² Value added measures the value of goods and services less the intermediary goods and represents a portion of output.

²³ Output measures the total value of goods and services produced as a result of the activities of the Cleveland Music Sector.

²⁴ The IMPLAN model does not separate the tax generated from local governments and the state.



Music as an Economic Engine

The Cleveland Music Sector as a whole is linked to other industries through buy-sell relationships that contribute to the sector's impact on the local economy. The activities of the Cleveland Music Sector accounted for 6,210 total jobs created in Cuyahoga County in 2010. Fifty-five percent (3,384) of these jobs were the direct impact²⁰ representing existing jobs in the Cleveland Music Sector (including jobs that are not listed in the ES202 database). An additional 25% of the jobs (1,550) were the result of the indirect impact on industries that buy or sell goods or services to the music sector. Finally, 21% (1,275) of the impact was from the induced effect, which represents the household spending of people who work in the music sector and its associated suppliers.

In addition to its economic impact on job creation, the Cleveland Music Sector generated \$274.4 million in labor income;²¹ \$474.1 million in total value added;²² and an output of \$839.8 million²³ in 2010. A total of \$91.6 million in tax revenue was also associated with the Cleveland Music Sector in 2010. Of that amount, \$51.9 million was federal tax revenue and \$39.7 million was state and local tax revenue.²⁴

The Musicians subsector alone created an economic impact on Cuyahoga County's economy, accounting for 681 jobs (including the musicians employed in this subsector), \$37.3 million in labor income, \$45.9 million in value added, \$46.3 million in output, and almost \$9.3 million in tax revenue in 2010.

The Promoters subsector created the largest economic impact of all the subsectors in the Cleveland Music Sector in 2010. Forty-seven percent of the total jobs created in the Cuyahoga County economy (2,901) resulted solely from the activities of the Promoters subsector. The Promoters subsector was also responsible for generating 50% (\$138.1 million) of the music sector's total labor income received, 55% (\$258.5 million) of the total value added, 62% (\$519.9 million) of the total output, and 52% (\$47.9 million) of the total tax impact.

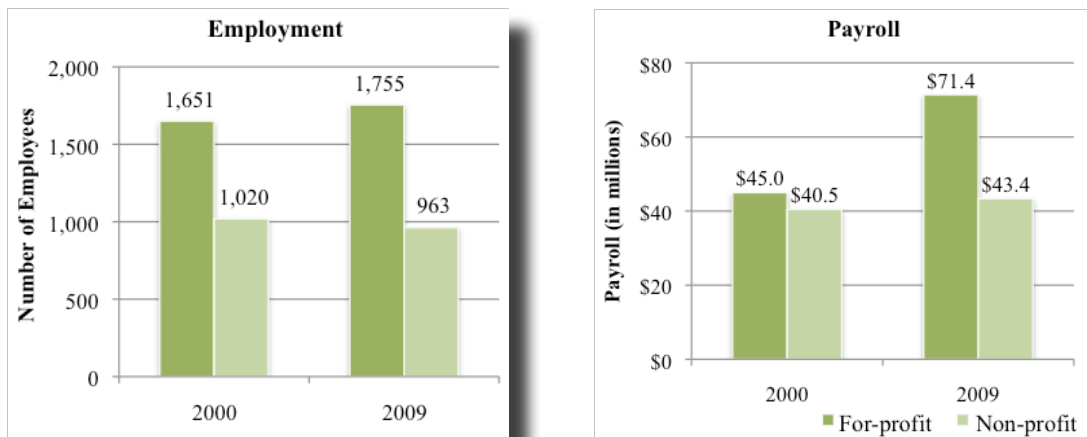
The Education & Museums subsector created the second-largest economic impact of any subsector on the local economy in 2010. Between the employment in this subsector, museum visitors, and student spending, this subsector generated 1,676 jobs, \$65.6 million

in labor income, \$105.8 million in value added, \$151 million in output, and over \$20.1 million in tax revenue.

The Cleveland Music Sector's for-profit versus non-profit business models surfaced several times in this study. Interesting to note, the for-profit portion of the Cleveland Music Sector employed more individuals than the non-profit portion in both 2000 and 2009 (Figure 3). In addition, whereas for-profit music employment grew by 104 jobs from 2000 to 2009, non-profit music employment decreased by 57 jobs, widening the overall employment gap between the groups.

The gap in employment between the for-profit and non-profit music sectors is mirrored by a substantial gap in each group's total number of music establishments. In 2009, the for-profit sector (130 establishments) included 105 more music establishments than the non-profit sector (25 establishments). The gap in for-profit and non-profit music employment can also account for the gap in payroll between sectors.

Figure 3: For-Profit vs. Non-Profit Sectors in the Cleveland Music Sector, 2000 and 2009



Source: Quarterly Census of Employment and Wages (QCEW)



²⁵ A list of the music venues that provided data on 2010 music events in Cuyahoga County for this economic impact study is included in Chapter 6.

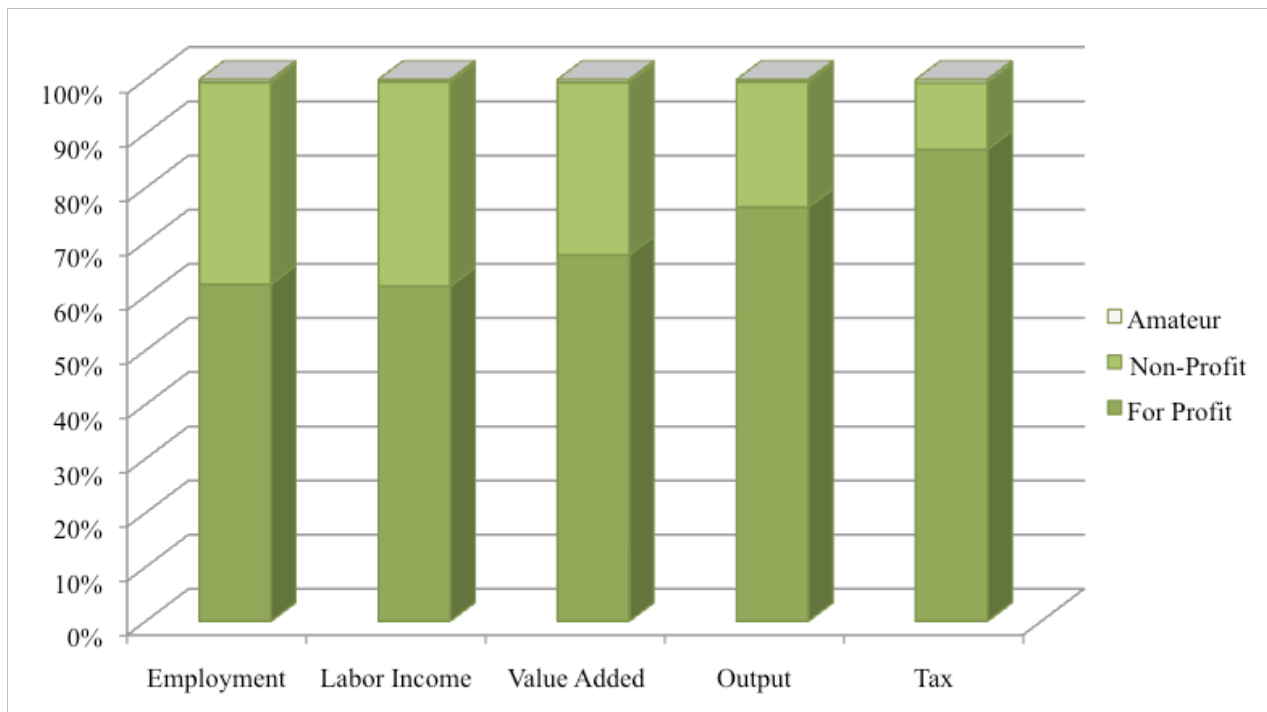
²⁶ A detailed analysis of the import and export of music industry products in the Cleveland Music Sector is located in Chapter 5.

²⁷ Detailed information on the direct, indirect, and induced impacts of events, employment, and amateurs is located in Appendix 6-3.

²⁸ Data from Nielsen SoundScan, 2010 Overall Album Sales. A Designated Market Area (DMA) is defined as the 50-mile radius around a central city.

²⁹ Cuyahoga County and the Cleveland-Elyria-Mentor MSA were compared to the Cincinnati-Middletown, OH-KY-IN MSA; Columbus, OH MSA; Indianapolis-Carmel, IN MSA; and Pittsburgh, PA MSA.

Figure 4: Percentage of Economic Impact of Music by For-Profit, Non-Profit, and Amateur Status, 2010





In 2000, non-profit groups in Cuyahoga County employed only 1,020 versus 1,651 employed by for-profit groups. In addition, while for-profit music employment grew by 104 jobs from 2000 to 2009, non-profit music employment decreased by 57 jobs, widening the overall employment gap between groups. In 2009, for-profit groups employed 1,755 people compared to 963 people employed by non-profit groups. There is also a vast difference in the number of establishments of for-profit and non-profit groups. In 2000, the for-profit group (148 establishments) included 132 more music establishments than the non-profit group (16 establishments). The establishment gap decreased to 105 establishments by 2009 (for-profit, 130 establishments; non-profit, 25 establishments), but the for-profit group still accounts for several hundred more employees than the non-profit group.

In 2000, the payroll for the for-profit portion of the Cleveland Music Sector (\$45.0 million) exceeded the non-profit portion (\$40.5 million) by approximately \$4.5 million. The payroll gap grew increasingly larger by 2009 with the payroll of the for-profit music sector (\$71.4 million) having grown to exceed the non-profit sector (\$43.4 million) by approximately \$28 million. The average wages of the non-profit and for-profit music groups in 2009 were \$45,037 and \$40,687, respectively, which resulted in a gap of \$4,350.

Not only did the for-profit business portion of the Cleveland Music Sector grow faster than its non-profit counterpart, it also generated a greater economic impact on the local economy (Figure 4). The for-profit sector of the Cleveland Music Sector accounted for 62% of the total employment impact (3,863 jobs), 62% of the total labor income impact (\$169.5 million), 68% of the total value added (\$320.5 million), 76% of the total output (\$641.6 million), and 87% of the total tax impact (\$79.8 million). For-profit, non-profit, and amateur sectors' impacts

together constitute the total economic impact of the music sector on the regional economy.

The Cleveland Music Sector creates an economic impact on the local economy not only from the local presence of music industry, but from tourist spending at local music events and performances by local musicians outside Cuyahoga County. In fact, the music sector is a unique sector of the economy in that it actively attracts visitors who spend their money in the region, thereby boosting the local economy. For example, although this study captured only a fraction of the music events organized in Cuyahoga County in 2010,²⁵ tourist spending alone at these events generated 12-13% of the Cleveland Music Sector's total economic impact on the local economy.

Cleveland musicians perform not only locally but also outside of the region. Although none of Cleveland's local performers were on Billboard's 2010 list of top performers who traveled across the country, 73% of local professional and amateur musicians performed regularly outside of Cuyahoga County.²⁶

The employment of the Cleveland Music Sector represented 86% of the sector's total employment impact (5,352 jobs), 87% of the total labor income and value-added impacts (\$239.2 million and \$412.4 million, respectively), 88% of the output impact (\$736.6 million), and 86% of the tax impact (\$78.8 million) (Table 1). Spending at music events represented between 12% and 13% of the total impact and amateur musicians represented 0.5%-0.6% of the total impact.²⁷

The products of the music industry include not only live performances, but also music records and albums. In 2010, 3.6 million albums were sold in the Cleveland Designated Market Area.²⁸ These sales were greater than the album sales in Indianapolis, Pittsburgh, Columbus, and Cincinnati, the four cities used for purposes of

comparison in this section of the study.

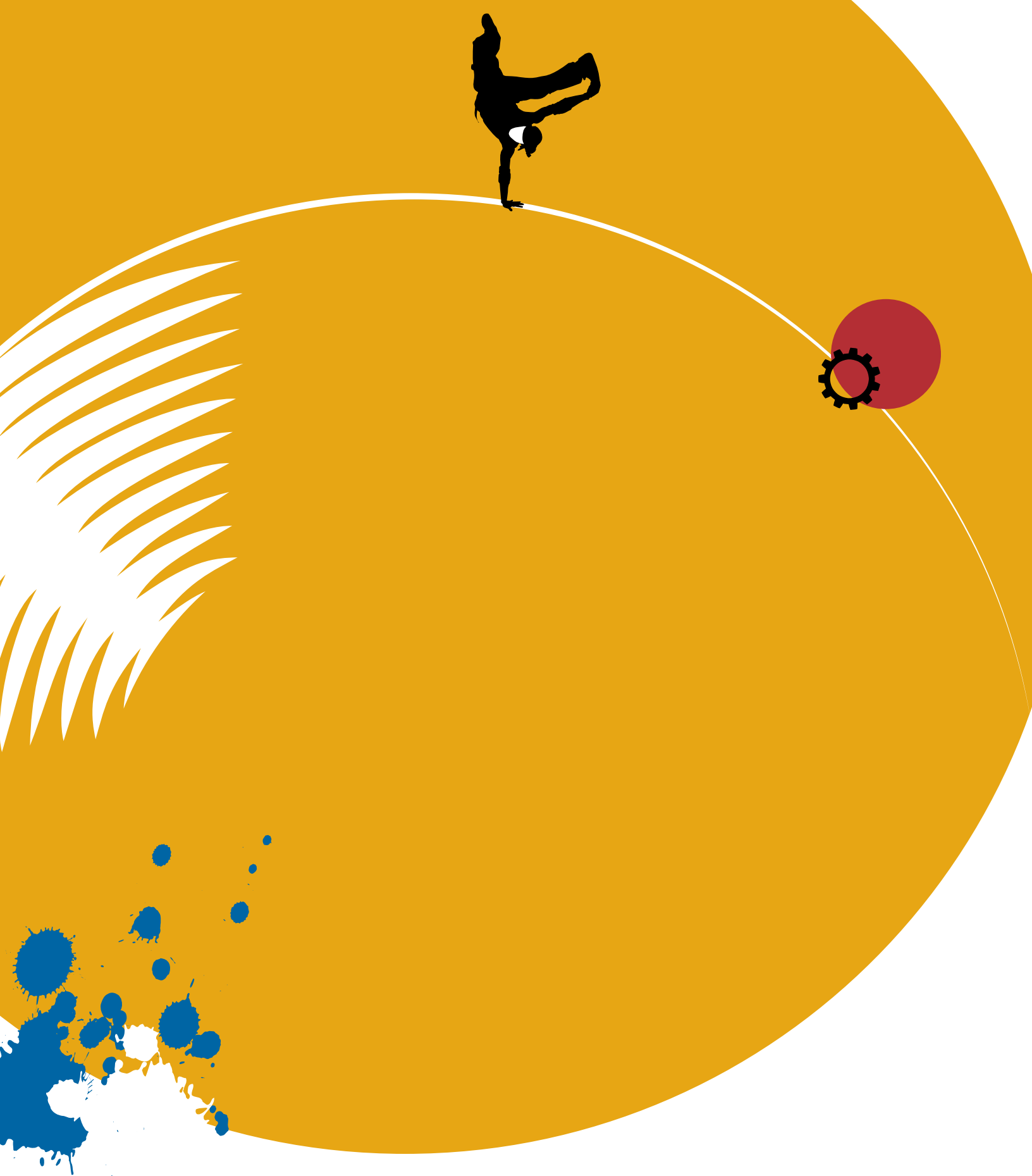
In addition to its high number of album sales, Cuyahoga County also has an ample supply of musicians. The Cleveland Music Sector's supply of musicians is commonly characterized as rich and diverse, due in large part to the region's low cost of living (especially as compared to other similar-sized metropolitan areas) and the excellent quality of the region's local artists, events, and music education programs. Strong support is needed to maintain and increase the Cleveland Music Sector's supply of musicians. However, the interviewees and focus group participants did provide several examples of existing factors detrimental to Cleveland's supply of musicians, including a lack of funding and weak advertising. The music sector needs to engage its leadership across its sectors and also work with public officials. This can create relationships that will better support and strengthen the current music scene. This could mean implementing programs that facilitate collaboration between local artists, promote performances and music-based events to raise public awareness, and seek out additional sources of funding. Unfortunately, a well-rounded supply alone, though advantageous, cannot create an economically dynamic music sector; attention must be paid to cultivating the demand for music as well.

The Cleveland Music Sector has experienced a decrease in the demand for music performances due to a variety of factors such as a shrinking population, a decline in disposable income due to the most recent recession, and a smaller number of establishments for music-related events, especially in relation to comparable MSAs. Increased opportunities to perform can be satisfied by a growth in local festivals, home concerts or private parties, and other music-based events. Only when the demand for music and music-related activities grows to meet the supply of musicians can the Cleveland Music Sector truly prosper.²⁹

Table 1: Economic Impact of Music by Employment, Events & Amateur Status, 2010

Subsector	Employment	Labor Income	Value Added	Output	Tax
Employment	5,352	239,199,297	412,366,218	736,563,938	78,779,564
Events	825	33,831,986	59,250,932	99,272,449	12,319,914
Amateur	33	\$1,366,070	\$2,440,624	\$3,935,828	\$541,581
Total	6,210	\$274,397,353	\$474,057,774	\$839,772,215	\$91,641,059

Note: Data inflated to 2011 dollars.



³⁰ "Music Therapy is an established health profession in which music is used within a therapeutic relationship to address physical, emotional, cognitive, and social needs of individuals. After assessing the strengths and needs of each client, the qualified music therapist provides the indicated treatment including creating, singing, moving to, and/or listening to music." Quote retrieved from <http://www.musictherapy.org/quotes.html>

³¹ The schools are: Baldwin-Wallace College, Cleveland State University, Ohio University, The College of Wooster and the University of Dayton, as reported by the American Music Therapy Association, <http://www.musictherapy.org>

³² American Bass, <http://www.americanbassusa.com/front/index.aspx>

³³ Niesel, J. (2010, October 28). Hot wax: How Cleveland's Gotta Groove Records is riding the vinyl wave. *Fresh Water Cleveland Online*. Retrieved from <http://www.freshwatercleveland.com/features/gottagroove102810.aspx>



Cleveland Music Innovation

The Cleveland Music Sector is a source of innovation, especially among the younger generations of local musicians. For example, the Cleveland Lottery League, a competition for local bands, was developed and executed by a group of musicians in Cleveland and is now being replicated at the national level. Some bands formed as a result of this competition are continuing to produce and perform new music locally. Policies and programs that encourage the exploration of the boundaries of music and collaboration with other fields may lead to even greater innovation.

There are opportunities in Cleveland for the music sector to innovate in collaboration with other sectors. For instance, there is a growing partnership between the music sector and the medical industry. Cleveland is well-known for the large medical industry that exists within its borders, including prominent and highly-ranked medical institutions like the Cleveland Clinic and University Hospitals. One aspect of the medical industry, music therapy,³⁰ has become an established strength of the greater Cleveland area. Of the 70 accredited education programs in music therapy nationwide, five are located in Ohio.³¹

Cleveland has a specialization in music therapy education through the Cleveland Music Therapy Consortium, a partnership of the Baldwin-Wallace College Conservatory of Music, Cleveland State University, and The College

of Wooster. Students attend classes at these institutions and then complete a six-month internship and pass a certified exam. This program was the first to require an outside internship and has been so successful that it has been replicated across the country.

With the growing demand for music therapists across the country, this specialization is becoming a successful educational export sector in the local economy. Due to Cleveland's excellent music therapy education programs, students from outside Northeast Ohio come to Cleveland to study. Once educated, therapists are exported from Cleveland and are placed outside the region. Additionally, all of the large health institutions, such as the Cleveland Clinic and University Hospitals, in Cleveland's medical sector use music therapy to treat patients.

Music and manufacturing represent another potential crossover area. Cleveland has a well-established manufacturing sector, including a skilled labor force and considerable industry knowledge, making it an ideal partner in collaboration with Cleveland's strong music sector. One point of collaboration is applying manufacturing skills to produce music instruments and music-related equipment. A good example of this crossover is American Bass, located in Maple Heights. American Bass manufactures premium, high-tech speakers, subwoofers, and amplifiers. American Bass has been actively involved in the sponsoring of

many events over the years where world-class competitors use their products.³²

A new addition to the music manufacturers in Cleveland is Gotta Groove Records. Gotta Groove Records is one of the few vinyl pressing facilities in operation today. Its 6,000 square foot facility is located on Superior Avenue in downtown Cleveland. Vinyl records are one of the fastest growing industries of the music sector in recent years. The technicians who produce Gotta Groove vinyl, in addition, are all involved in the music industry outside of their manufacturing work, often as performing musicians.³³ There is great potential for additional music manufacturing in the region.

A discussion of music and innovation in relation to Cleveland's music scene must include Ingenuity Fest, a festival that merges art and technology. Visual arts, performance pieces, and multiple musical acts are featured alongside presentations by high tech firms, research universities, and local colleges. One exhibit, Temple of Tesla, includes live, original music, theater, and dance all sharing the stage with an enormous Tesla coil. With its strong industries, diverse musicians, and creative denizens, it is only logical that Ingenuity Fest thrives in Cleveland. As Ingenuity Fest redefines cultural festivals, it is a presentation of Cleveland's innovation potential.



³⁴ Northeast Ohio was identified in the Cleveland Amateur Musician Survey as three metropolitan areas with the central cities of Cleveland, Youngstown, and Akron.

The Cleveland Music Sector's Challenges and Opportunities



GEOGRAPHY

The purpose of this study is to describe the Cleveland Music Sector strictly within the boundaries of Cuyahoga County. Input collected from the interviews and focus groups, however, revealed a consensus among study participants regarding the true size and geography of the music sector. Specifically, Cleveland is seen by many as the driver and signature name for the music sector that extends far beyond Cuyahoga County.

The general term “Northeast Ohio” is used to describe Cleveland and its music sector. In addition to Cleveland, the Akron-Canton area was most frequently included as part of the region making up the local music sector. Reaching beyond Cuyahoga County, the borders of the Cleveland Music Sector were described as extending as far south as Akron-Canton, Lorain-Oberlin to the west, and Lake County to the east. As stated in an interview, “Working musicians will go to other areas like Mentor, Lorain, and Elyria for gigs. It is at least a five-county area.”

As part of the Cleveland Amateur Musician Survey, respondents were asked to identify the locations where they normally perform; specifically, they were asked whether the locations were within Cuyahoga County, outside Cuyahoga County but within the Northeast Ohio (NEO) region,³⁴ outside of the NEO region but in the state of Ohio, in states other than Ohio, or internationally. Participants most often responded that they play within Cuyahoga County (32%) and outside Cuyahoga

County but within the NEO region (26%). This reiterates the fact that the Cleveland Music Sector expands beyond Cuyahoga County into surrounding regions.

The Cleveland Music Sector was also defined by the location of music schools including Oberlin College, University of Akron, Kent State University, Youngstown State University, and all the Cleveland music schools. One focus group participant said, “Akron, Kent, and Canton are connected to Cleveland.” To reinforce this argument, another interviewee mentioned that one of the attractions of the Cleveland music education scene is the possibility of music students and graduates playing with prominent musicians not only from the Cleveland Orchestra, but from many classical ensembles located in the region. The greater Cleveland region has more orchestras regionally located than comparable economic areas. Moreover, some of our music graduates find their first jobs in one of the regional orchestras, including CityMusic, The Ohio Philharmonic Orchestra, The Cleveland Chamber Symphony, Apollo’s Fire, Akron Symphony, The Canton Symphony Orchestra & Chorus, and the Warren Philharmonic Orchestra. Graduates also find employment in orchestras located in neighboring metropolitan areas, including Ohio’s Dayton Philharmonic Orchestra, The Clermont Philharmonic Orchestra, Columbus Symphony, Toledo Symphony, Erie Philharmonic, Central Ohio Symphony, Southern Ohio Symphony Orchestra, and the Springfield Symphony Orchestra.

Many artists are frequently associated with Cleveland even though they are from surrounding counties. The Black Keys were a repeated example illustrating the Cleveland Music Sector. They have become somewhat synonymous with the Cleveland music scene despite coming from Akron. In fact, their first gig was at Cleveland’s Beachland Ballroom.

Therefore, Cleveland is the base for the music sector due to its size and volume of philanthropy. In addition, large institutions such as The Cleveland Orchestra, PlayhouseSquare, and the Rock and Roll Hall of Fame and Museum, all of which are located in the city, have grounded Cleveland as the center of a broader regional music network.

A key opportunity that this challenge presents is how the Cleveland music sector can more fully embrace its role as the anchor of the Northeast Ohio music scene and promote a sense of regional collaboration versus competition for musical acts and tourists. Local Cleveland artists regularly commute to surrounding counties for steady work and musicians from suburban counties routinely include the city of Cleveland in their work travel. Although this study focused on Cuyahoga County, no sector is insulated against regional forces. For this reason, the Cleveland Music Sector should consider regional voices when thinking about strategies for repositioning itself nationally. Without a regional focus, the sector would alienate a great deal of talent and business that is clearly associated with Cleveland’s music scene.

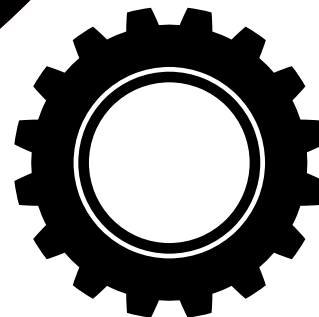
FRAGMENTATION

A common theme in the interviews and focus groups was the fragmentation of the Cleveland Music Sector. Many of those interviewed described the Cleveland Music Sector as disjointed and scattered. They believed that while the region is filled with talented individuals, they are not organized or united in a meaningful way and face challenges in connecting with others.

Several opportunities emerged during the interviews and focus groups to address this

challenge. Artists frequently spoke of the need for the music sector to form a dedicated support organization for musicians where they could find relevant information and resources for musicians in Cleveland. There is also a demand for the sector to develop more structured networking opportunities for musicians, such as a “music house” which could be created as a physical space where musicians could rehearse and collaborate together. Within this space, musicians and other industry professionals could be invited to offer guidance and professional

development assistance for local musicians. Additional support musicians desired was related to developing business skills to bring their art to market as well as marketing and exposure assistance; specifically, musicians asked for help developing electronic press kits. Focus group participants also identified some key infrastructure that the sector should focus on developing including booking agencies, investment capital firms, and entertainment lawyers.



³⁵ Holcomb, B. (1993). Revisioning place: De- and re-constructing the image of the industrial city. In G. Kearns & C. Philo (Eds), *Selling places: The city as cultural capital, past, and present* (pp. 133-143). Oxford, England: Pergamon Press.

³⁶ Jensen, O. B. (2007). Culture stories: Understanding cultural urban branding. *Planning Theory*, 6(3), 211-236.

³⁷ Cortright, J. (2002). The economic importance of being different: Regional variations in tastes, increasing returns, and the dynamics of development. *Economic Development Quarterly*, 16(1), 3-16.

³⁸ Dougherty, Conor. (2009, May 16). "Youth magnet" cities hit midlife crisis. *Wall Street Journal Online*. Retrieved from <http://online.wsj.com/article/SB124242099361525009.html>

³⁹ Regional Arts and Culture Council (Portland, Oregon), www.racc.org

⁴⁰ Save Austin Music, <http://www.saveaustinmusic.com/>



Interviewees also called for more collaboration between existing music organizations. One option is for the sector to identify a “Music Czar” who could guide the vision of the Cleveland Music Sector, which would allow all organizations to work toward a common goal. Another is for the music sector to develop a comprehensive website to promote the full scope of the Cleveland music scene.

Finally, many people feel Cleveland needs to be (re)branded as a “music city” to be counted with the likes of Austin, Memphis, Nashville, and Portland. However, merely launching an expensive branding campaign that has little impact on the way people experience a place will fail quickly. Instead, the Cleveland Music Sector should unite around a common goal or cause and strategic vision for its future. Using this as a guide, the sector could actively work to elevate its causes on the public agenda. A

PUBLIC POLICY

Research completed by economist Joseph Cortright suggests that a region’s preferences and behaviors influence a region’s economic activity.³⁷ His research has helped validate the concept that making a place distinctive is critical for both tourism and residents’ quality of life. Fortunately for Cleveland, the vibrant music sector gives the city a sense of place. Unique, independent venues and local musicians differentiate Cleveland from other metropolitan areas.

Scholarly literature has detected strong relationships between regional economies and artistic activity, and has argued for increased support of the arts and culture sector. Ann Markusen and David King’s *The Artistic Dividend: The Arts’ Hidden Contributions to Regional Development* documents how attracting and retaining artists can contribute to broader regional economic outcomes. Beyond economics, a vibrant arts and culture scene is a locational amenity that can attract the coveted group of young, educated professionals. This group frequently decides where to live based on a city’s amenities, and then searches for jobs. The following examples of public support for music and other arts in different cities could serve as guidance to help the Cleveland Music Sector address its needs and develop more

strategic approach would also permit the sector to define and delineate what is distinct about Cleveland music and capitalize on its strengths.

Cities in the 21st century need to be relevant, engaging, and interesting to attract and retain people. More than ever, places are commodities in which people choose to live, work, or visit.³⁵ There is a need for a story about the city (such as how Cleveland became the birthplace of rock and roll) that is backed up by a built environment (events and venues like Ingenuity Fest and The Parkview). Cities have to have a positive street culture and offer something “cool” to visitors.³⁶

One way to ensure that music stays a vital part of the fabric of Cleveland is by supporting local musicians. As one participant put it, “Going to see live music should be part of the culture in Cleveland.” If Cleveland cannot support

support for local musicians and music venues.

Portland, Oregon’s music scene was an important factor in its ability to attract educated young people, even as its unemployment rate climbed above the national average.³⁸ Talented workers want to live in cities and neighborhoods where they feel engaged. Live music is one thing that connects people to their communities. Portland’s Regional Arts and Culture Council delivers a range of support to local artists with several sources of public funding. A variety of grants are available including general support grants to organizations, project grants for organizations and individual artists, and professional development grants for artists and arts administrators. In addition to funding, the Regional Arts and Culture Council provides comprehensive resources to artists including Art Spark - a regular event for artists and art supporters to meet, mingle, and network. The Council’s website provides information about hundreds of arts organizations, groups, and services for artists as well as information about current auditions, calls for artists, job postings, educational opportunities, and artists’ residencies. The Council also oversees a leadership development program in the arts community.³⁹

its musicians, the musicians will not support Cleveland. Staying in Cleveland and keeping talent here should be a true sign of success in the Cleveland Music Sector.

While there are great success stories in Cleveland, creating more innovative events and venues will serve to improve the image of the city from the bottom up. Events, places and businesses like the Lottery League, the Beachland Ballroom and Tavern and Gotta Groove Records create a buzz that travels quickly on today’s information highway to an untapped group of potential visitors and residents. By celebrating what is distinctly Cleveland in its music offerings, a reputation is created which can lead to music being a driving force in the image, and ultimately the brand, of Cleveland.

Austin, Texas, which is renowned for its live music scene, incorporates arts and culture policy directly into its economic development office at city hall. Austin’s Economic Growth and Redevelopment Services Office includes: Cultural Arts Division; Cultural Funding Programs; Art in Public Places; Emerging Technology Program; and the Austin Community Cultural Plan. Under Cultural Funding programs, the city of Austin has a Creative Industries Loan Guarantee Program to help individuals, non-profits, and companies involved in music, film, art, and technology secure conventional funding. Another program, Art in Public Places, requires 2% of all capital budgets to be spent on art for any construction project. Through this project, art has been incorporated throughout the city of Austin. Maps and guides to Austin’s public art displays are available on the city website. It should be noted that even in Austin there is concern about the survival of the live music industry, its artists, and venues. Growing cost of living, a booming population, decreasing audiences at many music venues, traffic and parking concerns, and lower pay for Austin musicians add to the problematic vitality of music industry there. Several grassroots organizations have convened to advocate for stronger support of the industry.⁴⁰

⁴¹ Innovation Philadelphia, <http://www.innovationphiladelphia.com/initiatives/creative-economy-fund.aspx>

⁴² The Philadelphia Cultural Fund, <http://www.philaculturalfund.org/about/mission>

⁴³ Arts Council of Indianapolis, <http://www.indyarts.org/>

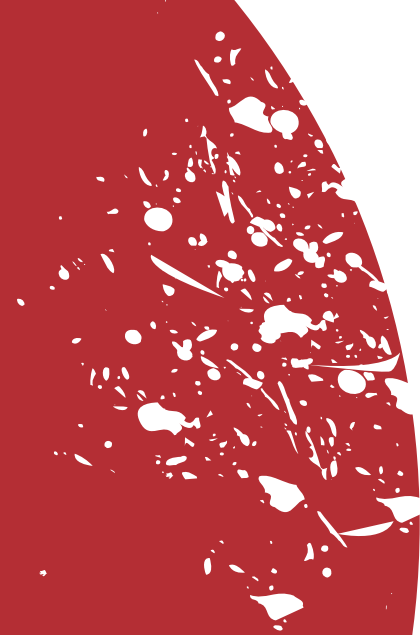
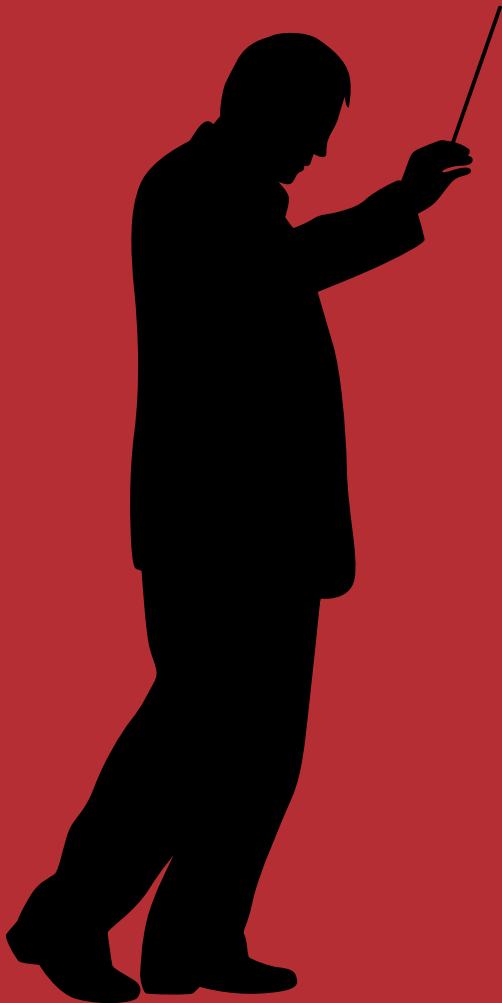
⁴⁴ ArtsWave, <http://www.theartswave.org/>

⁴⁵ Greater Columbus Arts Council, <http://www.gcac.org/grants-services-for-artists/>

⁴⁶ The Ohio Arts Council, <http://www.oac.state.oh.us/>

⁴⁷ Cuyahoga Arts and Culture, 2009 Report to the Community. Retrieved from http://www.cacgrants.org/downloads/CAC_annual_report_2009.pdf

⁴⁸ Community Partnership for Arts and Culture, 2009-2010 Annual Report. Retrieved from http://www.cpacbiz.org/ftp_file/10-11/AnnualReport09-10.pdf





Philadelphia is another city that has come to understand that “a strong for-profit creative economy is vital to the economic growth of the Greater Philadelphia region.”⁴¹ Through Innovation Philadelphia, an economic development organization that services greater Philadelphia, the skills and creativity of the region’s youth have been successfully nurtured as economic development resources. Innovation Philadelphia has established several initiatives to achieve its goal of growing for-profit, creative industries like music production and digital media. These initiatives include the Young Professionals, New Idea Generation, and the Creative Economy Investment Fund. A second example of Philadelphia using its local arts and culture to promote economic growth is the Philadelphia Cultural Fund. The mission of this non-profit, city-funded corporation is “to support and enhance the cultural life and vitality of the city of Philadelphia and its residents.”⁴² The fund awards grant money to provide support for existing, Philadelphia-based arts and culture institutions while also encouraging the involvement of residents in the Philadelphia arts scene by generating new opportunities.

Minneapolis also strongly supports its arts and culture communities as part of its economic development strategy. In the city of Minneapolis, the Department of Community Planning and Economic Development Planning houses Cultural Affairs and works closely with the Arts Commission. Together, these departments created the Minneapolis Plan for Arts and Culture, a 10-year strategic plan that defines the role of the city in supporting arts and culture. Additionally, in the Twin Cities, the McKnight Foundation, in collaboration with the Walker Arts Center, developed the website mnartists.org. This website is a database of Minnesota artists and arts organizations of all genres. The website serves as a meeting place for all Minnesota artists and a marketplace for their art. The site provides opportunities for the public to discover new artists and potentially patronize them.

The city of Indianapolis has several programs to support local artists. The Arts Council of Indianapolis runs two artist fellowship programs. The Creative Renewal Arts Fellowship Program supports established artists in the community and the Robert D. Beckman Jr.

Emerging Artist Fellowship helps to launch “up and comers” in the creative community. The Emerging Artist Fellowship has two components.⁴³ First, artists are given financial support to develop their work. Second, the program provides participants with a unique professional experience typically reserved for artists further into their careers. Fellows are introduced to experiences, connections, and relationships with arts institutions and other professional artists in central Indiana. In addition to the fellowships, Indianapolis has an extensive artist database of 600 local artists that can be used by consumers or artists.

Some Ohio cities have strong support for the arts. In the past, the city of Cincinnati had direct grants for artists, but that program was halted as a result of the economic downturn. The Fine Arts Fund provided crucial support for large, established arts organizations and, more recently, for smaller, emerging arts organizations. In 2010, however, the Fine Arts Fund underwent a transformation to become more responsive to the community’s needs. The organization has relaunched as ArtsWave⁴⁴ with a mission to create community through the arts by connecting people and creating vibrant neighborhoods. The organization’s new goal is “to be a leader and a regional catalyst that works to advance the vitality and vibrancy of Greater Cincinnati by mobilizing the creative energy of the entire community.”

The city of Columbus uses a portion of its hotel/motel tax to fund arts and culture grants administered by the Greater Columbus Arts Council, which has two distinctive programs to support local artists. The first program, the Opportunities for Artists (OPPArt), is a monthly series of networking that includes professional development workshops, roundtable discussions, and social events to connect individual artists and further their careers. The second program for artists is the Individual Artist Fellowships. This program provides unrestricted funding to artists for one year in the form of direct grants. Fellowships have been available in a range of disciplines including: visual arts, crafts, media arts, literature, music composition, choreography, film/video, and playwriting.⁴⁵ There are also a variety of funding opportunities available to artists and arts and culture organizations through the Ohio Arts Council.⁴⁶

Locally, financial support for arts and culture is one of the nation’s top five sources of local government support for the arts. In 2006, Issue 18 passed in Cuyahoga County as a ballot initiative. This groundbreaking legislation levied a 1.5 cent per cigarette tax for 10 years to create a “significant and sustainable stream of local public support for the county’s widely celebrated arts and cultural assets.”⁴⁷ Cuyahoga Arts and Culture (CAC), which administers this public funding, has awarded more than \$65 million to 150 arts organizations since 2006. CAC has a fruitful partnership with the Community Partnership for Arts and Culture (CPAC), which has resulted, among other things, in the creation of the Creative Workforce Fellowship. The fellowship, funded by CAC and administered by CPAC, provides \$20,000 to 20 outstanding artists in a variety of disciplines each year. CPAC views the fellowship as “a targeted investment in the careers of individual artists.”⁴⁸ Beyond financial support, local musicians can attend CPAC’s Artist as an Entrepreneurship Institute (AEI), which is an artist-focused course designed to provide the tools artists need to hone their business skills. The course covers all aspects of developing an artistic business, from marketing to bookkeeping and accounting. Another local resource for musicians is the COSE Arts Network, which is a network of professional artists and arts-based business owners offering professional development resources, education and networking events, health benefits programs and business savings to those in the creative industries.

These local initiatives are available to serve the broad needs of artists from a wide variety of disciplines. However, the participants in this study expressed that an opportunity existed for the music sector to develop greater leadership among its ranks. Mobilized representatives from the music sector would be well-positioned to collaborate and work together to develop and advocate for more music-specific support services. Additionally, this group would be a proactive public voice for the sector that would be able to catalyze and unite its distinct segments.





Celebrating History, Evolving for the Future

Cleveland was known as one of the most prominent music cities in the 1960s, and people still want to compare it to what it once was. This argument was repeatedly made during the interviews, focus groups, and the Cleveland Amateur Musician Survey. Cleveland's music scene has changed since the 1960s, prompted by several factors outside of local control.

The music industry, like other industries, has changed and adapted over time. Once reliant on the production of vinyl records, cassettes, and CDs, today's music industry is based on digital technology. The advent of iTunes and YouTube have made it increasingly simple to be a self-promoting musician. For this reason, few cities have the resources available to continue record production. Musicians find themselves heading to major cities like New York, Los Angeles, Chicago, and Nashville when the time comes to produce a record. Cleveland musicians are not an exception to this new way of life.

The music industry is shifting to an Internet-based business. It has become much more difficult to compete for an audience when thousands of musicians are at the consumer's disposal online. Artists can post their music online, free of charge, and, as one interview participant suggested, it merely takes the right person to hear your music online in order to get a record deal. Some nationally famous acts found fame through the video website YouTube. In order for Cleveland to compete, the Music Sector must work with local public leaders to advocate for support to increase the number of record labels and representation available in the city. If this were to happen, a musician would not feel the need to resort to online distribution or relocation to another city. This sentiment was best echoed by an interviewee: "It is natural for an artist to be where the distribution is. New York City is a

popular destination for this reason; it has an abundance of record companies." It is important to note that Cleveland has the capability to change and compete in a new music industry. Enough vision, infrastructure and drive exists in Cleveland to once more achieve a thriving music sector.

The current economic climate has also affected the music industry. The recession has significantly diminished the amount of money people can budget for entertainment, which has decreased ticket sales, attendance, and performance opportunities for artists. During difficult economic times, it is becoming increasingly rare to make a living as a musician; however, this is not strictly a Cleveland issue. The Tri-C Jazz Fest can serve as an example of the impact of economic downturn. In 2010, the Jazz Fest celebrated its 30th anniversary. Even with this special event, the fest experienced a decrease in ticket sales from 2009. People are becoming more conscious of their spending habits, resulting in reduced ticket sales.

The recession has particularly affected small to mid-sized venues, causing many of them to close. In addition, venues are not booking a sufficient number of local acts. National names are needed to draw audiences to events and venues. Consumers may now be more willing to attend a single showing of a national act rather than several concerts of local musicians.

Attendance has also fallen because of a dwindling population and urban sprawl. Fewer people live in the city of Cleveland and people from suburbia are increasingly less likely to travel downtown for events. For this reason, musicians and audiences are beginning to turn to unconventional performance spaces such as converted warehouses, libraries, and sacred spaces. Increasing the diversity of physical

venues for music shows not only illustrates the effect of the recession, but also speaks to the versatility of the Cleveland Music Sector. For example, the East Cleveland Public Library and the Lakewood Public Library are known as alternative performance spaces that host free concerts. Conventional performance venues are suffering through the recession, but these alternative spaces are providing opportunities for audiences to continue to enjoy music.

Apollo's Fire Cleveland Baroque Orchestra is a classical ensemble whose strong innovative components have drawn audiences to its performances for over 20 years. An Apollo's Fire performance is much quieter than a full orchestra, making for a more intimate affair. They also eliminate the "invisible barrier" between musicians and its audiences, performing in alternative spaces with close proximity to listeners, often with no elevated stage. The music can resonate with people in an emotional and spiritual way, which is the artistic philosophy of Apollo's Fire.

As the music industry continues to change, the level of difficulty to maintain a music career is similar in most places, especially throughout the Midwest. Artists must work several jobs to afford their living expenses. Many musicians in Cleveland work as performing artists, teachers, and in music sales. Fortunately, the cost of living in Cleveland is more affordable than in other cities of its size, which attracts many musicians who use Cleveland as a homebase and commute to performances outside of the region. Based on its strengths, Cleveland is positioned to reinvent itself within the changing music industry, and has an opportunity to surpass traditional music cities and once more become a music innovator, whether it is in music and medicine, music and manufacturing, or any other music endeavor.

APOLLO'S FIRE



Apollo's Fire by Roger Mastroianni

THE CLEVELAND ORCHESTRA

Founded by a group of local citizens in 1918, The Cleveland Orchestra has grown to be one of the most critically-acclaimed, nationally recognized orchestras in the country.

Current Music Director Franz Welser-Möst created the Community Music Initiative, which works with the Cleveland Metropolitan School District to expose students to world-class classical music. In 2007, the orchestra established a Miami residency. This partnership, supported by the Musical Arts Association of Miami, brings the exceptional, world-class music of The Cleveland Orchestra to broader constituencies.

In 2009, the Cleveland Orchestra announced a new community engagement initiative. This initiative will create programming to educate and excite Northeast Ohio residents of all ages. The many facets of the community engagement initiative include bringing musicians into local Head Start programs, providing Cleveland Orchestra concerts for school-age children at Severance Hall, mentoring talented youth, and supporting high school orchestras and choirs. Engaging with the broader Cleveland community, the program also offers educational programming for adults.

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

Apollo's Fire: Not Your Grandmother's Baroque Band

Apollo's Fire has been captivating audiences for nearly two decades with performances that are both passionate and thought-provoking. Baroque music at its finest, Apollo's Fire, simply put, is brilliant music-making. Invoking elements of historical accuracy, musicians play period instruments with exuberance in the manner Handel or Vivaldi would have imagined. This makes for a fresh and surprising twist to familiar music that is sure to delight casual listeners and baroque enthusiasts alike.

WHAT IS APOLLO'S FIRE?

Formed as a non-profit art organization in 1992 by harpsichordist and conductor Jeannette Sorrell, Apollo's Fire received initial funding from the Cleveland Foundation and the Ohio Arts Council. In nearly 20 years of entertaining audiences they have earned a reputation as one of the country's hottest baroque bands.

Apollo's Fire has experienced local acclaim through performances of *Mysteries*, Handel's *Messiah*, and *Fire and Folly*. In addition, the

ensemble recently presented the program *Bach, Telemann and the Bohemian Gypsies*, a selection of reconstructed gypsy pieces along with Bach and Telemann concertos.

Because the band has a strong following, they have toured extensively throughout the United States performing at well-known venues such as the Aspen Music Festival, the Boston Early Music Festival series, the Library of Congress, the Ojai International Festival in California, and the Chautauqua

Institution. Furthermore, their reputation has spread beyond the United States; they have performed internationally in the Netherlands, Spain, and the United Kingdom.

Apollo's Fire has also released several commercial CDs and each season the ensemble can be heard on many of the nation's most prominent radio broadcasts, including National Public Radio, Canada's CBC, Britain's BBC, and the European Broadcasting Union.

IT'S ABOUT AUTHENTICITY, PERIOD

There are more orchestras in Northeast Ohio than in any comparable economic area. These include The Cleveland Orchestra, CityMusic, The Ohio Philharmonic Orchestra, The Cleveland Chamber Symphony, Akron Symphony, The Canton Symphony Orchestra & Chorus, and the Warren Philharmonic Orchestra. The list continues as one travels outside the region: The Dayton Philharmonic Orchestra, The Clermont Philharmonic Orchestra, Columbus Symphony, Toledo Symphony, Erie Philharmonic, Central Ohio Symphony, Southern Ohio Symphony Orchestra and the Springfield Symphony Orchestra.

Because of this oversaturation, naysayers think that there is little need for yet another classical music orchestra. However, what's so unique about Apollo's Fire is that they go one step further than other bands, combining passionate renditions of baroque music with an intriguing dose of authenticity to the musical experience. Jeannette Sorrell notes, "I have always loved this [baroque] music and working with period instruments. It involves improvisation, and is based on simple harmonies that are rooted in Nature."

Paul Jarrett, Managing Director of Apollo's Fire says, "There was a demand for baroque music and music from the 1700s and earlier

to be performed on instruments of the time. That's the difference between us and other orchestras; we play music on instruments that would have originally played period music the same way it was scored."

An Apollo's Fire performance is also much quieter than a full orchestra, making for a more intimate affair. It's like a time warp; the musical pieces are played according to the composer's ear, the way they were originally written. This allows audience members to time travel back to the 1700s for a few hours to enjoy the music as the composer originally intended.

CASE STUDIES

APOLLO'S FIRE

SUNFIRE AND SONG

Named for the Greco-Roman god of the sun and music, Apollo's Fire's aspiration is to take its audience on an emotional journey via music. Baroque music, a lively and cheerful form of classical music characterized by repetitious rhythms, functional harmony, and complex melodies, wasn't written for large concert halls. It was popular in the 17th and 18th centuries, and usually performed in smaller settings. Jarrett explains, "There were a lot of house concerts that would take place in the home during that period, so we try to recreate that sort of intimate feeling."

Imagine sitting in the atrium of a majestic gothic style church along with an audience of

about 50 listening to a small music ensemble performing sacred pieces such as the Bach or Mozart masses. Perhaps food and wine is served. The musicians play and talk to the audience without barriers.

The music is able to resonate with you in an emotional and spiritual way. That's the artistic philosophy of Apollo's Fire. Performers endeavor to evoke an Affekt or emotional state in their listeners, just as their 18th Century predecessors did.

Apollo's Fire often eliminates the "invisible barrier" between its audiences, performing in close proximity to listeners. To further

engage their audience, Sorrell speaks directly to the audience between pieces enabling them to connect on a deeper level. She notes, "We try to project the rhetorical idea or mood of each phrase of music, in a way that the audience will feel drawn in. We also cultivate a lot of interaction on stage between the players."

This connection is stronger than others developed in more formal classical ensemble performances. It contributes to a spiritual experience that resonates with audience members and keeps them coming back for more.

CITYMUSIC CLEVELAND

Cleveland is a hub for classical music. CityMusic Cleveland is one of the most distinctive music ensembles in the city's classical music scene. It is a professional chamber orchestra whose objective is to present quality music for the cultural enhancement of the community at a price everyone can afford . . . shows are free!

Currently in its 7th year of operation, the 40-piece ensemble performs at different community venues to bring music to audiences who otherwise may not have had the opportunity to experience classical music. The ensemble and its musicians, conductors, soloists, teaching staff, and stage hands are all supported by a wide range of funding sources including Cuyahoga Arts and Culture, National Endowment for the Arts (NEA), several foundations, corporations, and local communities.

CityMusic has been very successful because it places ownership of the concerts on the community, which increases local involvement in the cultural growth of residents. Local musicians and educators are thrilled to work with CityMusic because of its enthusiastic approach to classical music and community improvement.

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



IT'S A MUSICIAN'S LIFE

Depending on the project, Apollo's Fire varies in both the size of its ensemble and the music performed. Musicians are not necessarily drawn from classical performers in the Cleveland area. They are specialists with considerable training and experience in performing early music styles on period instruments. Musicians with this specialty are rare and for that reason, many of the group's artists are not from Northeast Ohio.

Jarrett says, "Our musicians are from all over the world. While our musicians are here, they make up Apollo's Fire but when our concerts are done they fly back to their homes and

have other engagements around the country where they make up other ensembles."

Many of the local musicians teach at Oberlin College or Case Western Reserve University and supplement their work with Apollo's Fire. That's not an anomaly unique to the baroque orchestra; it is a trend that is very common throughout the nation. One of the strongest benefits of Cleveland's music scene is the on-going opportunity to teach here. Both formally trained students and hobbyists are eager to take lessons from the area's finest performing musicians. Cleveland may offer fewer hours to teach, but the pay per hour

is comparable or even higher than in other cities around the country.

For Apollo's Fire there is a relatively short window for a typical performance week. It's not uncommon for musicians to arrive in Cleveland on Sunday, rehearse Monday and Tuesday, and then perform Wednesday through Sunday, returning home after their last scheduled performance. This arrangement is a win-win situation for Apollo's Fire since Jarrett is able to employ world quality artists as demand warrants, and musicians are able to earn supplemental income from performances.

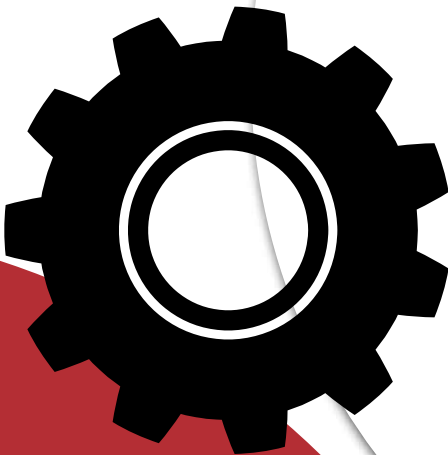
OHIO PHILHARMONIC ORCHESTRA

It's quite a testament to the Cleveland music scene that classical music enthusiasts are willing to support yet another orchestra in the Cleveland area. Clearly, Clevelanders understand the importance of classical music and education.

The Ohio Philharmonic Orchestra is the brainchild of Music Director and Conductor Domenico Boyagian. In 2010, he was awarded a \$20,000 Creative Workforce Fellowship from the Community Partnership for Arts and Culture, which he used to create the Midway Ensemble, a training repertory orchestral democracy. The Creative Workforce Fellowship is generously funded by the citizens of Cuyahoga County through Cuyahoga Arts and Culture.

William Laufer, a local filmmaker, began the ensemble with the goal of producing free classical music performances and innovative programming. This emerging orchestra focuses on music education and community outreach by connecting younger audiences from several inner-city schools with classical music through school visits, the Young Composers Series, Concerto Competition and Recording Series, and the Educational Video Series. Under Boyagian's innovative direction, the Ohio Philharmonic Orchestra is becoming a leader in classical music and youth education.

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



CASE STUDIES

APOLLO'S FIRE

WHY CLEVELAND?

Apollo's Fire is a mobile-performing baroque ensemble. Despite the fact they perform all over North America and Europe, and employ many out-of-state musicians, Apollo's Fire is based in Cuyahoga County.

A major factor in the decision to set up shop here was the wealth of opportunities available at the time. Sorrell isn't a Cleveland native, but did her graduate work at Oberlin

College. She founded Apollo's Fire while collaborating with Roger Wright who was the Artistic Administrator of the Cleveland Orchestra.

Jarrett notes that there is a significant amount of support for classical music in Cleveland, "Clevelanders expect to have world class music. There are generations of culture lovers that you won't find in other

places due in large part to the legacy of the Cleveland Orchestra."

Sorrell agrees, "Cleveland has an unusually sophisticated audience for classical music—larger and more educated than other cities of this size. The legacy of George Szell, who convinced the Cleveland philanthropic families to support classical music on a world-class level, has benefited Apollo's Fire".

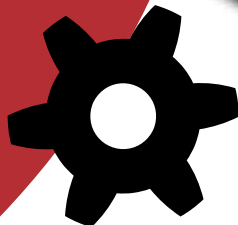
THE CLEVELAND CHAMBER SYMPHONY

It is evident that Cleveland is home to some of the world's most notable classical music organizations. For nearly a quarter of a century, The Cleveland Chamber Symphony has been dedicated to presenting music solely from our time. There is no other organization in Cleveland that focuses primarily on contemporary, American composers.

The symphony has presented an astounding 170 world premiere performances. The Cleveland Chamber Symphony also records, produces, and distributes contemporary music. Currently, the symphony has released 15 recordings, one of which received a Grammy Award in 2007.

Like many other ensembles in the city, the symphony works to promote youth participation in the genre. Twice a year, the organization partners with local educational institutions, including Baldwin-Wallace College and the Music Settlement, for a contest to present and record new works by students. Among its notable awards, the Cleveland Chamber Symphony has received several John S. Edwards awards from the American Society of Composers and Authors and Publishers (ASCAP) for its strong commitment to American music.

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



CATCH 22

With fewer people buying tickets and less grant funding and donations available, many non-profits in the music sector are seeking alternative sources of revenue. Jarrett notes, "We're being asked to fund ourselves through ticket prices and concerts and less through individual and foundation support. Ticket prices have to be higher, and this creates a financial barrier for people who want to see our performances."

Apollo's Fire recently started touring internationally and has just signed a record contract with a London-based record label. To date, they have produced 18 CDs.

They are starting to see the benefits of using such alternate means to increase operating sustainability, but switching over to this new budget model has a downside. Jarrett explains, "Some grant makers say that we're

not really a non-profit anymore if we make recordings and tour. In their eyes we're starting to become an act. They challenged us with finding other ways to make ourselves sustainable, so it's an ongoing issue on how to balance both sides."

HOW TO MAKE A MORE MUSIC FRIENDLY TOWN

For Apollo's Fire, the main concern is getting the word out. It's a marketing issue, a need to connect with their target audience — and it's a challenge. There's local TV, but that's not the primary source for arts patrons according to Jarrett. For one performing group in the midst of many it can be difficult to advertise

without getting lost among other artists that are here.

"The city will be vibrant and attractive to newcomers if there is an arts scene in Cleveland," says Sorrell. She believes there should be more communication between

classical music orchestras and ensembles. Discussing performance schedules to avoid conflicts, sharing plans about new programming, and collaborating on events would help present a more unified classical music presence in Cleveland.

FUTURE PLANS

In 2012, Apollo's Fire will celebrate their 20th anniversary. They will continue to be based in Cuyahoga County and have every intention of continuing for another 20 years.

To sustain them, Apollo's Fire will rely less on a patron subscription-based model and focus efforts on touring and maintaining a global rather than regional presence. They will also continue development of crossover/folk programming in addition to their baroque repertoire.

"It's about reaching other audiences. We will go to them; we will go where the demand is," says Jarrett.



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

CASE STUDIES

CINDY BARBER & THE BEACHLAND BALLROOM



CINDY BARBER

Cindy Barber, owner Beachland Ballroom, by Gus Chan/The Plain Dealer



Cindy Barber and the Beachland Ballroom and Tavern Keeps on Keepin' On

Cindy Barber is one of Cleveland's unsung heroes. A Cleveland native, Cindy has worked for more than a decade to make her city a better place through the creation of the Beachland Ballroom and Tavern with partner Mark Leddy. Her dedication, hard work, and inventive spirit has allowed Cindy to make a positive, long-lasting impact on Cleveland's North Shores Collinwood neighborhood.

CINDY AND THE WATERLOO ARTS DISTRICT

Prior to Cindy's efforts, the commercial area around Waterloo Road in the North Shores Collinwood neighborhood had been steadily declining since the 1970s. "The road really didn't have any sort of identity and no reason to be on the map until Cindy's vision of creating an arts destination in that location," says Brian Friedman, Executive Director of the Northeast Shores Development Corporation, "Today there are several businesses that occupy space that was

previously vacant and that's due in large part to Cindy's efforts."

According to Brian, Waterloo Road has improved its vacancy rate by 40%. Today there are approximately 65 full- and part-time jobs, and a once dilapidated and desolate area is brimming with activity and vibrancy. So much activity in fact, that the roadway is not capable of handling the traffic the district generates. "Next year,"

Brian says, "the city is going to spend 5 million dollars rebuilding the streetscape." North Shores Collinwood was once a neighborhood forgotten by the city; this type of reinvestment proves it is again becoming a prime destination.

Longtime residents and community activists agree that the Beachland Ballroom and Tavern is a leading cause of the district's incredible transformation.

HANGIN' OUT AT THE BEACHLAND

If any live music venue represents the heart and soul of the Cleveland music scene, it's the Beachland Ballroom and Tavern. It's the kind of place where you can enjoy a beer, a home-cooked meal, and great music. This popular Cleveland hangout is known for its high-caliber artists, presenting performances from bands that have a national following as well as major artists from the Greater Cleveland area.

The Beachland Ballroom reflects Cleveland's multifaceted personality, catering to the city's diverse population with an eclectic combination of shows from jazz and blues to punk, blue grass, indie, and classic rock. "You don't just hear one style of music there and that's increasingly a rare thing," says one Cleveland music professional, "I go there because I know I'll always hear something interesting."

Located at 15711 Waterloo Road, people who visit this Cleveland landmark will find memorable musical performances, reasonable prices, and friendly staff — all in a homey and unpretentious setting.

IT'S THE BEST OF OLD SCHOOL CLEVELAND

Since opening in 2000, Cindy and Mark's intentions from the beginning were to create a place to help improve the North Shores Collinwood neighborhood. Fresh off her role as editor of the *Cleveland Free Times*, an alternative weekly newspaper, Cindy teamed

up with Mark who worked as a booking agent for Pat's in the Flats, a popular Cleveland entertainment venue, to open the ballroom. Drawing from their previous careers in the music industry, knowledge of local bands, and a love of Cleveland, an

almost accidental enterprise has become a world class music venue, recognized by Esquire as one of the "Top 100 Bars in America".

"I set out to do some something for the

CASE STUDIES

CINDY BARBER & THE BEACHLAND BALLROOM

neighborhood I live in," says Cindy, "I decided that I needed to do something really local and try to turn my neighborhood around."

Cindy and Mark set out to find the perfect location — a 50-year-old brick building a half mile from Euclid Beach State Park.

"I looked for the biggest building and what could I do with it. I am still surprised oftentimes at the success we have had. We

went in there very naively and just started by booking shows," admits Cindy.

In addition to booking artists for performances, Cindy also employs artists to work as waiters, bartenders, and other ballroom employees. Her reasoning — many artists need day jobs because they are not able to make enough money working solely as performers. Only 20% of Cleveland based musicians make a living working as full-time

performers. Many artists delve into teaching, composing, music technology, or working for music venues. "Besides a steady full-time job with the Cleveland Orchestra or at PlayhouseSquare, musicians freelance and teach at multiple places," says one performer and non-profit activist, "to make ends meet many musicians have day jobs and perform evenings and weekends."

LOCAL BOYS MAKE GOOD

Having booked literally thousands of shows over the last decade, when asked to name one of her most memorable relationships with local artists, Cindy mentioned The Black Keys. With the Billboard chart topping song "Tighten Up" and multiple 2011 Grammy awards including Best Alternative Music Album and Best Rock Performance by a Duo or Group with Vocals, this blues-rock duo from Akron is one of the largest success

stories to come out of the Cleveland music scene in recent years— and Cindy gave them their big break.

"We gave The Black Keys their first show and helped them get their booking agent and their manager when they first started out. They paid us back with the relationship we've had over the years," says Cindy. It's this dynamic relationship that Cindy has with

musicians and the neighborhood that makes her a pillar of the community and a stand-out in the Cleveland music scene.

Since making it big, The Black Keys have performed several times at the Beachland Ballroom to a sold-out house each time — earning Cindy much needed profits in a depressed economy.

THERE'S ALWAYS A CHALLENGE

Despite booking approximately 600 shows a year, and having a great location and very affordable ticket prices, the one-two punch of continued urban sprawl and the current economic recession has taken a toll on the Beachland Ballroom.

Cindy remarks, "The Cleveland market is shrinking and it is very hard to compete with other cities. The thing about Cleveland is that we have amazingly talented people here and an unbelievable amount of venues and entertainment options every night of the week. We probably have as many options as Chicago does, but we have a third of the population to support those places."

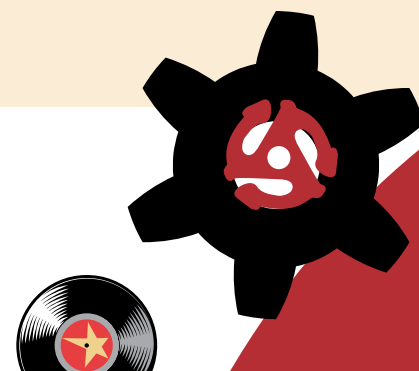
There is also a psychological East/West divide in Cleveland that prevents the comingling of audiences. People from suburbia are no longer coming into downtown for events.

Cindy says, "Restaurants, theaters and every other place are competing for a limited amount of people. Sometimes we are very fortunate in that we book big artists that draw people from out of town to the Ballroom. Often there are more people from out of town at performances than Clevelanders."

According to the U.S. Census Bureau, Cuyahoga County's population in 2000 was estimated at 1,393,978. In 2010 the population fell to 1,280,122. This 8.5% decrease has affected nearly all aspects of the Cleveland music scene. There has been decreased attendance at local venues and special events, resulting in substantially less private/corporate sponsored performance opportunities. Without a stable audience, musicians face dwindling performance opportunities and lower income.

Perhaps for this reason, the hardest hit music organizations in Cleveland have been small- to medium- size venues. With lower ticket sales and less money coming in the Beachland Ballroom has accrued a significant amount of debt.

As of March 2011, Cindy was researching the possibility of converting the Beachland Ballroom and Tavern to non-profit status. She believes this would enable the Ballroom to remain open; however Cindy has more altruistic goals. She intends to use her knowledge and expertise in the music industry to teach bands how to become more professional.



PEARLS OF WISDOM

How can this be done? Throughout her professional career, Cindy has amassed an incredible amount of knowledge and insight about the Cleveland music industry.

She started working for record labels when she was a teenager. "Cleveland used to have a lot of record companies, warehouses, and distribution facilities back in the old days," she reflects.

Early in her career, Cindy worked for Warner Brothers and ABC records. After a brief stint

outside Ohio with a boyfriend who was a vice-president for Warner Brothers Records, she came back to Cleveland, managed a few local bands and started an underground newspaper.

"Cindy has a go-getter personality. She loves getting involved in new ventures and hooking up with new people. She has an inventive, out of the box attitude," says Sarah Gyorki, former Director of Arts Collinwood. "She is fully invested, completely 100%. This is her entire life."

Cindy understands the importance of cross-promotion and collaboration with other Cleveland-based venues. She works regularly with many organizations including the Rock and Roll Hall of Fame and Museum, the Happy Dog, and the Root Café. She intends to put her knowledge to good use providing artists with guidance on how to become successful.

HOW COULD THE CLEVELAND MUSIC SCENE BE IMPROVED?

Despite great talent and top-notch venues, a major problem with today's music scene in Cleveland is that artists have a difficult time finding financial support and services to make a living solely as performers. As a result, many artists leave Cleveland for the possibility of greener pastures.

Cindy states, "It's about creating a product and then selling that product based out of Cleveland, and that doesn't happen here. People are moving to Austin or Nashville or New York or Chicago where there is a better infrastructure and more overall support from a business standpoint."

Cindy believes that the Cleveland music scene can be improved by aggressively marketing Cleveland as a music friendly town. She speculates that incentives for affordable housing and rehearsal space would help attract and keep artists.

Cleveland can be an appealing city for musicians because of its considerably lower cost of living compared to other major music cities. "The low cost of living [in Cleveland makes it] 1/3 the cost of New York or LA," said a local artist.

Many musicians' wages are equal to those in larger cities. This fact coupled with Cleveland's low cost of living creates a musician-friendly living environment. "Cleveland has a low-cost of living and that allows artists to freely explore their music", said one of our interviewees, "In some cases, they may be able make more money in this smaller market than for a gig in a larger city."

WHAT'S THE STORY?

Cindy and the Beachland Ballroom are one of Cleveland's success stories. With a standard of first-rate musical performances and continued popularity among Clevelanders and out-of-towners alike, it has amassed a reputation as the "place to be" for a great night out and good music in a uniquely Cleveland setting.

However, even the most successful of undertakings can have its share of bumps in the road. While financial burdens continue to plague the Beachland Ballroom, Cindy has the knowledge, skills, and "chutzpa" to reinvent the bar. If Cindy is able to shift to non-profit status, she believes the ballroom will not only continue, but expand

its services, helping local artists become more successful. In true Cleveland spirit the Beachland Ballroom and Tavern rocks on.

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

CASE STUDIES

BILL RANSOM'S CLEVELAND RHYTHM



A large yellow graphic overlay in the bottom-left corner. It features a white diagonal banner with the text "BILL RANSOM" in blue. To the left of the banner is a red circle with three black musical notes. Below the banner is a large yellow star. At the bottom left is a black gear icon.

BILL RANSOM

And the Beat Goes On . . . Bill Ransom's Cleveland Rhythm

If you're looking for the perfect example of what a Cleveland musician can be, look no further. Bill Ransom does it all, from teaching to performing to recording music on his own record label, Bongo Time Records, Ransom personifies the idea of what musicians can achieve through hard work, immense talent, and an open mind.

The rhythmic, up-tempo beat on a bass drum, the electrifying crescendo on a cymbal, the rat-a-tat-tat on a snare that makes you want to get up and boogie; these are the sounds that emerge from Bill Ransom. Well, not from him — but from the percussion instruments he plays while teaching at Cleveland State University and The Music School Settlement.

Known for his versatility, creative energy, and physically demanding playing style, Bill Ransom is a force to be reckoned with. Picking up his first set of drumsticks at age 10 and obtaining a formal music education at Ohio University, he has played drums and percussion for 37 years and loves every minute of it.

TALK TO ME!

As a successful, experienced Cleveland-based artist, Ransom has a lot to say about music in Cleveland.

The Cleveland area is fortunate because there is an abundance of amazing musicians who call the city their home. According to data collected from the U.S. Bureau of Labor Statistics, the number of musicians and singers in the Cleveland Metropolitan Statistical Area (MSA) is higher than comparable MSAs such as Cincinnati, Columbus, and Pittsburgh.

Almost like a high school clique, most musicians have an inner circle of fellow

musicians with whom they have strong relationships and perform with on a frequent basis.

Through formal instruction, his directing of “Jazz Meets Hip Hop” at the Tri-C JazzFest, and his role as a consultant to the Shaker Heights school system, Ransom has taught literally hundreds of aspiring musicians.

He is a local talent with a national following. Ransom is known mostly for his performances in the jazz, neo-soul, R&B, and hip-hop genres, however his understanding of contemporary and classical music makes him a sought after musician for a wide variety of gigs. He has worked with many national level artists including Gerald Levert, Patrice Rushen, Beth Hart, Marion Meadows, Cecil Bridgewater, Diane Reeves, Mary Wilson, and James Newton.

musicians with whom they have strong relationships and perform with on a frequent basis.

There is, however, a noticeable lack of communication and organization among them, especially when they try to connect with artists outside their own niche genre. Understandably, this lack of a structured communication system has led to a strong, word-of-mouth trade.

According to the Cleveland Amateur Musician Survey conducted by the Center for Economic Development, word-of-mouth was the most popular means of advertising for

Ransom has appeared in a number of theatrical productions including “Love, Janis”, has performed music for several TV commercials, and has made appearances on TV shows including Late Night with David Letterman.

In 2005 he released his debut album Generations, which features some of Cleveland's top musicians performing modern mainstream jazz standards by standouts like Chick Corea, Miles Davis, and Leonard Bernstein.

artists. On an informal basis, artists network and promote themselves referring each other for gigs and lending support when needed.

Ransom stresses the importance of networking. While many seasoned artists may over time amass a shortlist of contacts they can call on to perform with, Ransom takes it one step further. He notes, “I've created a pretty big database. Let's say I need a bass player to cover for a gig, but he has to be an acoustic player or a fretless bass player- I know who to go to for that.” His database consists of people he has performed with over the years as well as “friend of a friend” contacts.

CASE STUDIES

BILL RANSOM'S CLEVELAND RHYTHM

FRIEND ME . . . PLEASE!

While this method works well for Ransom, most artists (especially those just starting out) don't have a comprehensive list of contacts. He suggests "Cleveland Musicians," a Facebook group, as a great place for musicians to build relationships. It provides a large, universal structure that enables artists from the Cleveland area to communicate with each other.

It's a closed group, meaning administrator Tony Quarles must approve you to become a member. However, the consistently growing group of (currently 383) local artists benefit immensely from the connections made there.

Ransom mentions that it's a useful tool for musicians to ask for advice, organize groups for spur-of-the-moment gigs, and spread the

word about upcoming performances. Now, that is a step in the right direction!

FORMAL MUSIC EDUCATION IN CLEVELAND

*The Cleveland area is a bit of an anomaly in that a large number of educational institutions exist regionally that offer collegiate level degrees for students wishing to pursue formal music study. These institutions include Baldwin-Wallace College, Case Western Reserve University, Cleveland Institute of Music, Cleveland State University, Cuyahoga Community College (Tri-C), and Oberlin College.**

These institutions offer exceptional music programs and share the goal of advancing Cleveland's music students toward excellence.

- *Baldwin-Wallace College is home to the Bach Festival, an extremely successful and well-known classical music festival. Now in its 79th year, the Bach Festival is the oldest collegiate festival of this type in the United States.*
- *The Cleveland Institute of Music has had an astounding 37 graduates join The Cleveland Orchestra. In 1969, the Cleveland Institute of Music and Case Western Reserve University created a partnership, resulting in some of the finest music education offered in the state of Ohio.*
- *Cleveland State University's Department of Music offers world-class training to its students through instruction from prestigious musicians including members of the Cleveland Orchestra and Cleveland Jazz Orchestra. The chance to learn from influential musicians in a brand-new, state of the art recording studio provides wonderful learning opportunities for students.*
- *Tri-C offers an affordable associate's degree in music. After students graduate, they have the option of transferring coursework to several other universities to earn a bachelor's degree, including the notable Berklee College of Music in Boston.*
- *Oberlin College's Conservatory of Music has for years been regarded as a leading music school in the nation, mentioned with the likes of Juilliard and other internationally known institutions. The college was a recipient of the 2009 National Medal of Arts.*

With a plethora of diverse programs available, anyone interested in pursuing a music degree can easily do so in Cleveland and its surrounding region.

**In 2010, Oberlin College was ranked 8th and Cleveland Institute of Music was ranked 17th on the list of Top 30 America's Best Music Schools and Colleges. U.S. College Rankings.*

<http://www.uscollegeranking.org/music/top-music-schools-ranking-in-2010.html>

PROMOTION, PROMOTION, PROMOTION

Ransom notes that the number of Cleveland area gigs has decreased in recent years due to the current economic recession.

Forty-five percent of Cleveland Amateur Musician Survey respondents indicated that it was difficult to get gigs in Cuyahoga County. Respondents also mentioned that there are not enough venues within their specific genre in which to perform.

While the local economy is beginning to improve, Ransom advises that it is important for musicians to promote themselves as much as possible.

Sites like Facebook and YouTube offer a free means for musicians to do just that. Ransom notes, "YouTube is a beautiful thing. You can tell people, hey look up my YouTube channel. I get that a lot. It's free and you can control

who sees you by giving certain people passwords to get in. It is not open to the public unless I want it to be, so ultimately I control who sees me."

THE MUSIC SETTLEMENT

Located in the heart of University Circle, The Music Settlement provides exceptional music education for students of all ages. The Settlement was founded in 1912 and, nearly a century later, has become one of the largest community music education organizations in the United States.

The Music Settlement specializes in private and group music instruction, early childhood education, and music therapy. In any given week the Settlement educates approximately 3,000 students. It also provides a popular summer music camp program, which includes musical theater and music lessons for younger students. Undoubtedly, The Music Settlement adds immeasurable value to music education in Cleveland while enriching its community on a daily basis.

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



PRIVATE LESSONS & THE CLEVELAND MUSICIAN

According to Ransom, while private lessons are a significant way for musicians to supplement their income, most musicians do not teach. Only 15% of survey respondents indicated that they received some of their income from music lessons. Private lessons, however, can be an artist's bread and butter; they are a relatively easy way to earn money in a short amount of time.

Ransom gives private lessons and believes they are beneficial for both the student and the teacher. He mentions, "I learn from my students, as I am instructing them." Currently he has 33 students per week from Cleveland

State University and the Music School Settlement, but in the past he's had up to 40.

There is no definitive mechanism for finding teachers for private lessons. Students find teachers primarily by word-of-mouth. Also many schools maintain a musician referral list. Other students call educational institutions like the Music Settlement for recommendations.

According to Ransom, hourly rates for lessons vary, just like gas prices. In Cleveland the going rate is about \$40 to \$50 per hour.

Despite the informal manner in which teachers and students are brought together, there is usually an official contract in place that sets the ground rules for the sessions. Ransom explains, "If a student doesn't show up, he has to pay the fee. If the teacher misses a lesson the student gets a credit. Usually students pay for 4 lessons at the beginning of the month and if the teacher misses a lesson then next month the student gets 4 lessons but only has to pay for 3."

CASE STUDIES

BILL RANSOM'S CLEVELAND RHYTHM

YOU CAN'T THROW A ROCK WITHOUT HITTING A MUSIC SCHOOL

Cleveland has its fair share of artists. There is a large sub-culture of musicians that call Cleveland their home. While some are self-educated many, including Ransom, received formal training through a post-secondary

education at an Ohio college or university. An interviewee from our advisory committee on the Cleveland music scene notes, "Cleveland is a bit of an anomaly. We have several higher education institutions in the Cleveland

area. These colleges and universities offer exceptional formal instruction for aspiring musicians. I can only think of a handful of other cities that have what we do here. We're pretty lucky in this regard."

3 WORDS: COST OF LIVING

When asked to name the biggest benefit Cleveland has to offer for a local artist, Ransom mentioned the relatively low cost of living Clevelanders enjoy especially when compared to other cities like New York or Los Angeles.

Ransom notes, "Housing is relatively inexpensive. You can have a decent lifestyle here. If you want to be comfortable, I'd suggest getting a day job, but if music is your passion and you want to do it full-time it's possible because the cost of living is so

low. After all, you can still be a starving artist and live in a loft. That's a great thing about Cleveland. I can't say that's the case in other cities."

CHALLENGES FOR CLEVELAND-BASED MUSICIANS

According to Ransom there are a few challenges facing Cleveland musicians today.

Many Cleveland-based artists would like to see more support from local music industry employers. "With all the talent that's here, why go elsewhere? If record labels, venues and other music industry employers focus

more on local artists, musicians would feel even more excited about the city in which they play," says Ransom.

There's also the matter of perception. Ransom notes that there is a need to promote Cleveland as a music town. He says, "I've toured both nationally and

internationally since 1990 and I've seen how other cities operate. I've been in situations where musicians on the bandstand say 'You don't play like you're from Cleveland.' We need to promote a music identity in Cleveland that outsiders can believe in."

ADVICE FOR CLEVELAND-BASED ARTISTS

As a seasoned musician who has done it all, Bill Ransom has some words of advice for musicians to be successful in Cleveland:

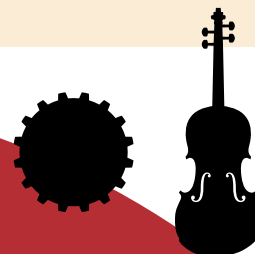
1. Wear as many hats as you can. Teach, perform, and compose. Do as many things as possible so you have multiple streams of income.
2. Know how to market yourself. Be a shameless self-promoter. Talent is good, but you should talk to people and

promote yourself as much as possible. Have an electronic press kit — the musician's resume, which includes a discography, links to videotaped performances, band photos and bios, and business cards. Also maintain an updated presence on online social networking sites.

3. Learn different genres of music. Musicians should be proficient in different genres and be more receptive

to gigs outside their main niche area. No one can play every genre extremely well, but if you increase your knowledge about different kinds of music, it will help you in the long run.

4. Be active. Conduct music clinics, set up recitals, and actively network with other musicians and venue owners so you are on their radar.



FUTURE PLANS – THIS COULD BE THE START OF SOMETHING BIG

Between teaching and performing gigs, Ransom fits recording into his busy schedule. He plans to release his second CD later this year. He also plans to use what he has learned after nearly 40 years of playing music in Cleveland and open a music school.

Ransom says, "It will focus on percussion and small-group play. Of course we will have lessons, but also symposiums and events for famous percussion artists." In addition, the school will emphasize something Ransom thinks every artist should know — how

musicians can market themselves to be successful in the Cleveland area.

Ransom plans to set up shop in Cleveland or Cleveland Heights, staying close to the city that has shaped his experiences as an artist.

IN A SENTIMENTAL MOOD

By all means, Bill Ransom is the quintessential Cleveland musician. He is an example of what a Cleveland musician can aspire to be. For Ransom, success is not just about how many gigs you have, or how many classes you teach, it's about how your music can touch other people.

He explains, "Our job as musicians is to promote a positive emotional feeling in the audience and enrich people's lives through music. If you can touch that one person in the back of the room that doesn't know anything about music but likes what he is hearing, then you have arrived."

Anyone who has seen Ransom perform knows he has arrived. In the years that follow, we can expect to see great things from this Cleveland son.

ROOTS OF AMERICAN MUSIC

Founded in 1999, Roots of American Music (ROAM) is a non-profit organization that reaches out to over 40,000 students annually through a wide variety of educational music programs.

At ROAM, students expand their horizons through exposure to jazz, folk, and blues music. This organization conducts several activities; most popular are the Assembly and Residency programs. The Assembly program is a one-time music event held at schools in which students are exposed to several music genres. Before the performance portion of the assembly starts, musicians teach students about the history of each genre. The Residency program aims to link Roots music with history and social change. Upon completing the program, students perform self-written songs in a school assembly.

ROAM works with local organizations to present public programs. These programs include after-school music workshops, song writing for teens at several public libraries, the Tri-C High School Rock Off, and involvement with the Natural History Museum and The Rock and Roll Hall of Fame.

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



Website: <http://www.facebook.com/people/Bill-Ransom/1366724984>

CASE STUDIES

CLEVELAND LOTTERY LEAGUE



CLEVELAND LOTTERY LEAGUE



SANTINA PROTOPAPA & PROGRESSIVE ARTS ALLIANCE

The Progressive Arts Alliance (PAA) is at the forefront of arts education advocacy in Cleveland. Since its inception in 2002, the PAA has educated over 20,000 students using cutting edge programs.

One of the organization's more intriguing programs is the RHAPSODY Hip Hop Education Program. Using Hip Hop as a tool for student development, it offers a unique approach to learning and improving self-esteem.

Now in its 10th year, PAA also offers a Hip Hop Summer Arts Camp. Presenting contemporary, "cool" programs students can relate to makes PAA one of the most unique music education organizations in Cleveland.

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

Cleveland Hits the Jackpot with the Cleveland Lottery League

What do you get when you combine the performances of Cleveland-based artists with the utter randomness of the Ohio lottery?

An innovative musical experience that is sure to entertain audiences in an excitingly new way.

It's creative and zany and the ultimate music experiment. The Cleveland Lottery League is a uniquely Cleveland experience. It involves randomly selecting 4 or 5 artists, setting them up in a rehearsal space for several weeks, and then inviting them to perform for a raucous Cleveland crowd. Typically, the

musicians don't know each other and are from different genres and backgrounds, so you never know what you're going to end up with.

"It's an event that is a game that you play with people. Victory is obtained by going

through the trials and tribulations of being an artist attempting to create a successful end product, however you also want to have a good time and make new friends," says Ed Sotelo, co-founder of the League.

A BRAINCHILD OF THE COUNCIL OF CHIEFS

The Cleveland Lottery League was created by local musicians Ed Sotelo, Jae Kristoff, Michael Pultz, and John Delzoppo (emeritus), who are known in the League as the Council of Chiefs.

"What inspired us was another thing that binds Clevelanders together besides music — that's sports! We are big sports fans, so we like the idea of a draft like they do in the NFL or NBA and we try to use some of the language," says Sotelo. Unlike a typical sports draft however, participation in the League

is non-competitive and not based on ability. It's more about artists' willingness to build new relationships and to work outside their comfort zone to produce something unique and engaging.

It all began with a simple question — What would happen if pre-existing groups broke up and started all over again? To Sotelo and his friends it seemed that local artists performed with a select group of fellow musicians in a limited number of genres. So if you break up a musician's comfort niche and

put him in an unfamiliar setting, he has the potential to grow and produce something of great musical significance for his audience.

Each member of the Council brings something to the plate in the creation and development of the League. "Jae came up with the seeds for the system that creates the bands. Michael is a great motivator and speaker. We spent a lot of time brainstorming ideas. We all had different strengths and weaknesses and pooled everything together," says Sotelo.

WHAT'S THE PLAY?

How is this done? The scenario is simple.

A survey is sent out to former participants as well as emerging artists on the Cleveland music scene. Artists' names, what instruments they play, and other information is entered into a spreadsheet.

Baseball cards are made of each musician. The cards list what bands musicians were in, what instruments they play, and other useful information.

On "Draft Night" musicians are assigned a number. Bands are formed by selecting numbers from an old-fashioned lottery hopper. The only stipulation is that each group is assigned some sort of percussion (drums, bass, etc) and at least one member of the group has access to rehearsal space.

"Anyone can be part of the draft," says Sotelo, "but they must have experience playing in a band that has recorded or toured in the past."

After the bands are assigned, they begin the creative process — writing, rehearsing, and recording 10-15 minutes of music. During this time bands come up with a name, logo, and biography.

The end result is a performance at The Big Show, a biannual event at the Beachland Ballroom and Tavern in North Shores Collinwood.



VIVA! CONCERT SERIES

The Cleveland Museum of Art's VIVA! Concert series is a hidden gem of which more and more Clevelanders are becoming aware. With the addition of the newly renovated Gartner Auditorium, the series has been gaining momentum and esteem as part of the Cleveland music scene. The amazing and diverse wealth of talent that can be seen at VIVA! will astonish even the most eclectic of music enthusiasts.

The series is a trip around the world, showcasing acts including a Russian classical choir, a Cuban Flamenco dance and music act, a musician playing the pipa (a Chinese instrument), and a Mariachi band. This is simply a short list of the incredible culture brought into Cleveland through the VIVA! Concert Series.

Website: [http://www.clevelandart.org/events/music and performance/viva gala.aspx](http://www.clevelandart.org/events/music%20and%20performance/viva%20gala.aspx)

THIS ISN'T A POPULARITY CONTEST, BUT . . .

More than the Council of Chiefs could have ever imagined, both the 2008 and 2010 shows were hugely successful. Approximately 150 artists formed 33 distinct groups that performed at each show.

"No one else has accomplished what we have in Cleveland," says Sotelo. While there have been similar attempts in other

cities including Los Angeles, no other city has presented an event of this magnitude in terms of both the number of bands performing and the tickets sales for The Big Show.

There are other positive effects that spring from the League's hard work. In 2010 they recognized six bands that were still together

after performing in 2008. Also, Sotelo notes that some friendships, business relationships and even romances developed thanks to the League's musical experiment.

Is the League popular? Yes! Will it continue to grow? You betcha! This is one of a growing trend of "cool" things to do in Cleveland.

IT'S NOT JUST A CLEVELAND THING

Part of the Lottery League's success is that it's about local artists performing for fellow Clevelanders, or so they thought . . .

While their audience is mostly comprised of family and friends, audiences from outside Cleveland are also drawn in due to the unique and interesting concept of this musical experiment.

"Local shows tend to bring in better crowds

— friends like to see their friends perform," says Kristoff, "but there's also this idea that we're putting something out there that others could enjoy."

According to the Survey of Local Venues, 25-30% of the people who attend Cleveland-based music events are not residents of Cuyahoga County. However when national or international music stars perform, out-of-towners make up 80-85% of show audiences.

The League also takes advantage of Cleveland's weather. The draft for The Big Show is in winter, February through April, which is usually a slow time for local artists.

"In Cleveland it's cold and gets dark early and there are not a lot of big events going on. We promote The Big Show at that time and it is easier to build an excitement around it for Clevelanders and out-of-towners alike," says Kristoff.

MEMORABLE PERFORMANCES

A memorable performance stood out in 2008 according to Sotelo: “We had a group that had the obnoxious but funny name of “Homeless Sexual,” who were very creative.” The band wrote a script, acted in the movie, and performed the soundtrack live as the movie was viewed by the audience.”

Another interesting performance took place at the 2010 Big Show. Sotelo notes, “That night we had a group called the ‘Newdicals’ who wrote and recorded a 15-minute musical that was an abbreviated version of The Breakfast Club, but with really strange and surreal plot twists. They

sang and wore costumes and performed to previously recorded music, so it was like a mini-theatrical production. It was completely crazy and absurd and a lot of fun.”

WHAT ARE THE LOTTERY LEAGUE’S FUTURE PLANS

In 2012 the Council of Chiefs plans to film a documentary about the development of the bands focusing on the complex relationships formed by strangers who work together to produce music.

Also, the Council is currently seeking non-profit status. They believe this will enable them to keep ticket prices low, get reimbursed for out-of-pocket expenses, have

a bigger production value for the Big Show, and a better “Draft Night”.

Sotelo notes, “This is ultimately about community building and it shouldn’t be about getting rich.”

The Lottery League fosters positive relationships between musicians, creating new ones and strengthening existing ones.

Outside the League’s busy season, they continue to interact, but in the warmer months, the focus shifts to softball. Kristoff notes, “We have ten softball teams made up of musicians and artists. Games take place in Clark Fields and Gordon Park. We have a great time and the softball league gets bigger year after year.”

CLEVELAND ROCKS – THE PLUS SIDE FOR ARTISTS IN CLEVELAND

While some findings from our research revealed the existence of difficult working relationships between local musicians, especially when competing for gigs, many artists state that positive relationships abound in the Cleveland area both inside the League and out.

The Council is comprised of musicians who have performed in the Cleveland area for several years. A common theme among them is the relative ease with which musicians meet and interact with each other and the existence of supportive relationships that develop over time.

“Friends are like family in the musicians’ circle. I live with musicians, I date a musician – we are all together. For many musicians, the comfort of the music scene here has kept them in Cleveland,” notes Kristoff.

Matthew Charboneau, the Arts Network Leader at COSE (Council of Smaller Enterprises) notes, “There is competition, but then again, it seems that people are much more open and friendly in Cleveland. There is also a generational aspect to it. Older players often take younger players under their wing to show them the ropes. That is prevalent here especially with jazz and traditional

music genres. Cleveland has a really open music community.”

Sotelo agrees, “People are easy to talk to, it is easy to network if you are not a jerk. It was a bit of an uphill struggle when I started out, but hanging out in local venues with like-minded folks was a great experience. I’ve met a ton of people and some of them are still my friends. That is one of the beauties of Cleveland. It is really easy to meet creative people.”



CASE STUDIES

CLEVELAND LOTTERY LEAGUE

IT'S ALL ABOUT PERCEPTION

Sotelo also mentions an important issue — the need for Cleveland to identify or brand itself with a label so that people can easily recognize Cleveland as a music friendly city. Cities with that reputation draw large audiences to music-based events and are perceived to be financially supportive of musicians.

According to the survey, Cleveland musicians are paid as well or in some cases better than musicians in other comparable cities, especially for music lessons. There are also

more opportunities to teach in the Cleveland area — through formal instruction at local educational institutions or through private lessons in the home or another meeting place. There is a significant demand for private lessons in Cleveland and, interestingly enough, a big portion of that demand is coming from adults who decide to study music as a hobby.

Another issue brought out in the interviews is that Cleveland does not do a good job marketing music, especially promoting local

artists. “If Cleveland will not care about its musicians, musicians will not care about Cleveland” said one local artist.

Kristoff also stresses the importance of marketing, “It’s about getting the word out to as many people as possible. Marketing should be focused on promoting Cleveland events. More people should be aware of what is going on in Cleveland, not just the big events.”



WADE OVAL IN UNIVERSITY CIRCLE

What started out as a small Wednesday evening concert series has grown into a weekly “Party in the Park” Cleveland event. More than 10,000 visitors each summer bring their families, friends, blankets, and lawn chairs to relax and enjoy music at WOW! Wade Oval Wednesdays.

Performed in a beautiful setting surrounded by the Cleveland Botanical Garden, the Cleveland Museum of Art, and the Cleveland Museum of Natural History, this one-of-a-kind concert-going experience combines the outdoor charm of Wade Oval with the excitement of live music.

Wade Oval in University Circle hosts a variety of music events that represent the richness of our region in genre and culture. Whether one is a fan of rock and roll, jazz, folk, gospel or reggae, there’s a concert that’s perfect for everyone.

Website: <http://www.universitycircle.org/uci.aspx?page=84>



THERE'S NOTHING TO IT, BUT TO DO IT

When asked what advice Sotelo would give to up-and-coming local musicians, he says, "If your goal is to sustain yourself by art alone, you really have to just stick it out. Surround yourself with good people. Be patient and creative in building your own network of supportive fellow artists, fans, and friends. Be content with that."

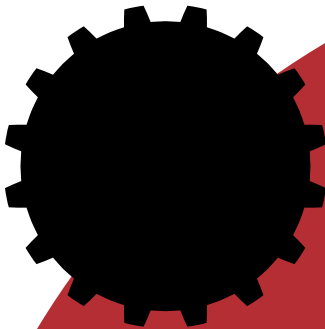
Of those musicians that identified music as their primary means of income in the survey, 75% earned almost all their income from music-related activities. In addition, 60% of

those individuals earned \$300 or more per gig within Cuyahoga County; that number grows to 80% if we examine individuals who get paid \$100 or more per gig in the county.

According to Sotelo, Cleveland already has two-thirds of what it takes to make itself a more music friendly city. We have an abundance of both talented musicians and venues for which they can perform. That in large part accounts for the success of the Cleveland Lottery League. All we need now is to focus efforts on marketing to attract larger

audiences from outside the Cleveland area to enjoy all the great music that Cleveland has to offer.

Cleveland has hit a home run with The Cleveland Lottery League. The Big Show is part of a surge in new performances. The Council of Chiefs is currently planning the 2012 Big Show, re-doubling efforts to find new artists from varied backgrounds to take part in the draft. Looking ahead, the League has nowhere to go but up.



<http://lotteryleague.blogspot.com/>

<http://www.facebook.com/pages/2010-Cleveland-Lottery-League/208343709847#!/pages/2010-Cleveland-Lottery-League/208343709847>

CASE STUDIES

VINCE SLUSARZ & GOTTA GROOVE RECORDS

VINCE SLUSARZ



Cleveland's Getting Its Groove On — Vince Slusarz and the Resurgence of Vinyl

Cleveland native Vince Slusarz has reinvented the wheel, or should we say record? Building on Cleveland's legacies of manufacturing and music, he opened Gotta Groove Records — a record-pressing business in Cleveland. Operating a small manufacturing facility to produce records in a supposedly dead industry in the midst of an economic recession may seem like a foolhardy venture, but with insight, research, and a little luck, Slusarz has established a thriving business.

IT'S A SIMPLE CASE OF SUPPLY AND DEMAND

Back in 2009, Vince Slusarz wanted to create a business from the ground up. He had no prior experience with business startups, but knew two things: he wanted it to be based in manufacturing and located in Cleveland.

Slusarz comments, "I just started thinking about things I like. I've always liked vinyl and I've always liked music." While Slusarz didn't have a background in the music industry, he certainly had an interest in it. During his college years, he worked part-time for his father-in-law who was a sales representative for Capitol Records.

A deciding factor for Slusarz to start his business was the notion that it wasn't just about nostalgia anymore. In recent years, the vinyl business has become a growing market that appeals to a wider range of consumers. He observes, "I saw that younger people were buying vinyl. Through research I found that the actual figures from vinyl being

produced have been going up year after year since 2006. With those things happening I thought, 'Geez it might be a good idea to start a vinyl record plant, especially if demand is going up.'"

Vinyl is experiencing something of a comeback. According to Nielsen SoundScan, an information system that tracks music sales throughout North America, although total album sales fell, the sale of vinyl albums has grown consistently since 2008. Vinyl sold 1.9 million units in 2008 and 2.8 million units in 2010. Last year's sales represent the largest amount of units sold since Nielsen SoundScan began gathering data in 1991.

Slusarz has a background in manufacturing. In a previous life he worked as a Chief Operations Officer for a plastics manufacturing company, so to him this was a no-brainer. "The demand is going up, capacity is fixed since record presses

aren't made anymore, so you're going to get business just by opening the doors." Slusarz's experiences in the music and manufacturing industries represent a microcosm of Cleveland and pay tribute to its legacies in both industries by reinvigorating the vinyl-manufacturing business in Cleveland.

Before Slusarz could set up shop he encountered a stumbling block — finding the proper equipment. With the emergence of other music media, the manufacturing of record presses had become a dying art. Luckily, after contacting a few companies, Slusarz came across Dynamic Sun, a record-pressing plant in New Jersey that was thinking about selling its equipment. The timing was perfect! So in the spring of 2009, Slusarz bought and relocated the equipment to Cleveland.

CASE STUDIES

VINCE SLUSARZ & GOTTA GROOVE RECORDS

FROM SOUP TO NUTS

Gotta Groove Records is a one-stop shop for pretty much everything associated with vinyl records. Customers are provided not only with vinyl records, but also with liners, inserts, and covers. All the customer needs to do is provide the music, cover, and label art and Gotta Groove will do the rest.

Slusarz says, “Generally speaking, artists provide music to us by downloading it to our site or giving us a CD. Then we translate that ultimately into a vinyl record.”

Some clients, especially those from major record companies, ship the print materials to Slusarz, but many customers use templates provided by Gotta Groove Records to create jacket and label art.

At full capacity Gotta Groove Records is able to produce over 11,000 records a week. Operating at this level helps to pay off Slusarz’s initial investment which was based

on his retirement fund. Soon Slusarz hopes to bring two more presses into operation, and purchase two additional presses. Running at full capacity (at three shifts per day), operation could increase to as much as 66,000 records per week. Mr. Slusarz has invested his heart and soul in the vinyl business. His plans for expansion in this relatively short time bodes well for the future.

THE COOL FACTOR: WHY IS VINYL SO POPULAR?

Competing against the portability of CDs and transferability of MP3s, vinyl has not been a viable contender for mainstream audiences in quite some time. While vinyl was once thought to be extinct, it’s still here and it accounted for a tiny portion — less than 1% — of total album sales in 2010.

That 1% translates to a formidable number, however. According to the Recording Industry Association of America, last year’s vinyl record sales were estimated at 4.3 million units. Slusarz believes the actual number of vinyl record sales is much higher. He explains, “These figures only account for units with UPC codes that are sold to major retailers. Our estimate is that this figure only accounts for about 15% of the overall true market.”

Despite the lack of a definitive count, vinyl’s popularity among enthusiasts has been on the rise for the past couple of years.

One reason for this resurgence onto the music scene is the arguably better sound quality when considering frequency rather than volume. Slusarz comments, “In many cases, CDs are compressed to make them super loud which means you lose the nuances on both the high and low ends of the spectrum. Many people find that vinyl sounds better.”

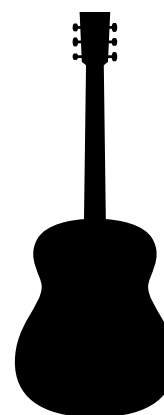
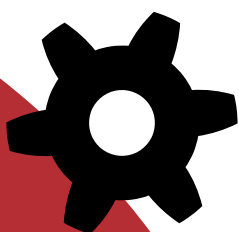
Records are especially known to have better capacity for lower frequencies. For this reason, they are often preferred by DJs on the night club circuit to play bass-heavy tracks.

Another factor accounting for the popularity of records is an album’s overall look. When comparing a record to a CD, for example, they have dissimilar canvas sizes. Vinyl albums allow artwork to be showcased over a much bigger area; it’s almost like a mini-poster. The art represents the artists and what they want their music to visually

portray. Appearance creates a critical first impression when it comes to artists’ releases.

Also, there’s the cool factor that lends itself to collectability. Slusarz notes, “I think a lot of bands are finding that they have a difficult time selling CDs at their merchandise tables so they need to have vinyl, and it is viewed as legitimate. Over time, more and more bands and labels are finding this out.”

Slusarz also says that playing a record is about the whole music listening experience. It’s a different kind of listening style, “When listening to CDs or MP3s you could shuffle play songs and do a lot of other stuff while you are listening to music. Playing vinyl requires you to basically sit down and listen to it. I think a lot of people are finding out (a) that is what the artist intended and (b) it’s a great way to disengage from all the constant technological interruptions we have every day.”



WHY SET UP SHOP IN THE 216?

Gotta Groove Records is located in Tyler Village, the heart of Cleveland's Midtown Asian community, among an eclectic combination of recording studios and a brewery. Slusarz says his decision to base operations out of Cleveland was in part a symbolic gesture. He comments, "Manufacturing is an important part of the strength for not just the city, but the whole region, so that was really my primary driver."

Manufacturing is an important Northeast Ohio legacy. As early as the 1860s, Cleveland had an expanding commodity-based economy due in large part to the development of shipping along the Great Lakes and the construction of railroad lines throughout Cleveland. As a manufacturing center, the city developed a skilled workforce specializing in the production of a wide variety of products.

Although in later years Cleveland shifted its focus to a knowledge-based economy, manufacturing continues to be important

as a platform for innovation as well as employment. In 2010, manufacturing was Northeast Ohio's largest sector, creating 17.8% of the gross regional product. Also it's the second largest sector in employment, providing 13.2% of the region's jobs. Manufacturing in Cuyahoga County delivers 11.4% of county's gross product and employs almost every 10th person with a job.

Another factor that led to the decision to headquarter in Cleveland is the abundance of free publicity Gotta Groove Records has received since opening its doors. People are intrigued about what Slusarz is doing. He has been on TV several times and stories about his business have appeared in local newspapers and magazines. This probably would not have happened if Gotta Groove Records set up shop somewhere else.

During its early months of operation, Gotta Groove Records pressed records mostly from local artists. These days the business has gone global with orders coming in from all

over the world including Canada, Australia, and China. Today, the Cleveland area currently accounts for only 5-10% of their business.

While running a business in Cleveland has been a relatively smooth ride for Gotta Groove Records, Slusarz notes that enticing manufacturing businesses through city-based funding incentives would make Cleveland a more business friendly town and increase manufacturing innovation.

The idea is simple: Make more grant money available for manufacturing startups. Slusarz comments, "I could have gotten money for putting out a shingle and having some sort of retail environment here. That kind of struck me as funny in the sense that retailers usually don't pay employees as well as manufacturers. My perspective on that is the city should be focusing its efforts to attract more manufacturing-based businesses here."



CASE STUDIES

VINCE SLUSARZ & GOTTA GROOVE RECORDS

HOW CAN A GOOD THING BE GREAT?

Slusarz believes that Cleveland has as good a music scene as any place in the country due to the sheer number of shows available from both local and national artists.

Findings from interviews, focus groups, and the Cleveland Amateur Musician Survey show that there is a large amount of talented musicians performing in Cleveland. One focus group participant mentioned that there are several venues in town that provide musical performances seven days a week. The availability of quality entertainment

on such a frequent basis is an asset to Cleveland's music scene.

While the Cleveland music scene is top notch, there is always room for improvement. It's chiefly about promotion according to Slusarz. Cities like Nashville or Austin are marketed that way. He also stresses the need for a "Music Czar", a phrase coined by Beachland Ballroom and Tavern co-owner Cindy Barber. This community leader should

be at the forefront of promoting all the great things that Cleveland has to offer.

Besides promotion, it's about organization. Slusarz believes organizing people in Cleveland's music industry is another crucial part of the solution, and he suggests creating an association responsible for gathering the disparate businesses in Cleveland — the manufacturing portion of the music industry, the venues, the recording studios, and others — would be a great asset to better market Cleveland.

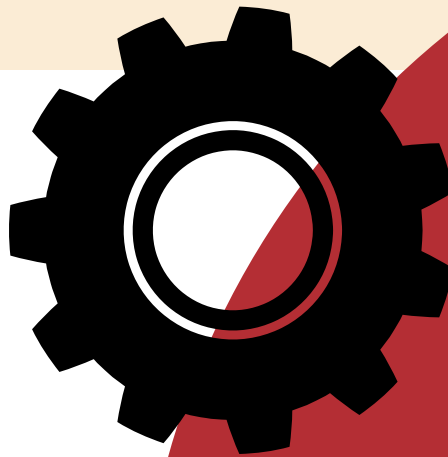


SOMETIMES BEING UNDER THE RADAR IS A GOOD THING

The future looks rosy for Gotta Groove Records. Slusarz notes, "We often hear the comment 'Gee they still make vinyl records?' That tells me is that record manufacturing has not reached the level of any kind of

mass consciousness. We've got a ways to go until I think that will happen and then it will probably start to plateau, but I do see record manufacturing continuing." With only about 12 pressing plants in the nation and a steadily

increasing demand for the foreseeable future, it's a pretty sure bet that Gotta Groove Records will continue to prosper as it gives Cleveland's manufacturing industry a creative spin.



website: <http://gottagrooverecords.com/>



CASE STUDIES

MUSIC THERAPY / DR. DEFORIA LANE / DR. ERIC ZIOLEK / LALENE KAY

MUSIC THERAPY



CLEVELAND CLINIC

In 2010, The Cleveland Clinic was nationally ranked in 23 specialties, including a #1 national ranking in Heart and Heart Surgery. The hospital holds 1,214 beds with 54,038 admissions per year. Of its surgical procedures, 27,142 were inpatient and 52,757 were outpatient (according to the ranking of US News Best Hospitals).

The Cleveland Clinic's newly created Arts and Medicine Institute functions to assist the healing process through the arts. This institute uses all art forms, including music to accomplish this goal.

The Cleveland Clinic, as a whole, employs 37,000 people who serve 3.2 million patients per year. As part of the Arts and Medicine Institute, Cleveland Clinic has developed a music therapy program directed by Dr. Iva Frattorini.

Website: <http://my.clevelandclinic.org/default.aspx>

Music: The Medicine of the Mind

Traditionally, music has been a ubiquitous part of everyday life. We use music in worship, entertainment, even exercising. In most instances the objective of music is to elicit an emotional response from the listener, but how about using music to develop motor skills, regulate heartbeat, or treat pain? Over the last few decades, there has been a significant increase in the use of music in the medical field. Leading medical facilities including the Cleveland Clinic, University Hospitals, and MetroHealth use it on a daily basis. Educational institutions including Cleveland State University and Baldwin-Wallace College offer degrees in music therapy. While the use of Music and Medicine is still in its infancy, over time it has gained in popularity for doctors and patients alike

We all know that music can make us feel better, reduce stress, and soothe the soul, but who knew these commonly held beliefs were actually based in fact? It's a science; in case studies and empirically-based research, the use of music has been demonstrated to

help patients recover and increase quality-of-life outcomes.

In more scientific terms, "Music and Medicine is the clinical practice and research related to music interventions and applications

for clinical music strategy in medicine," according to Dr. Eric Ziolek, Chairman of the Department of Music at Cleveland State University.

SO, WHAT IS MUSIC THERAPY?

Music therapy combines music and therapeutic techniques during treatment of an illness to help improve the physiological, psychological and emotional well-being of the individual.

According to the American Music Therapy Association, music therapy is a clinical

and evidence-based approach to treating patients. It uses music interventions to accomplish individualized goals within a therapeutic relationship with a credentialed professional.

It's not about listening to music while getting a massage at a spa or falling asleep at night

to a nature CD. Through structured sessions in a controlled setting, a board-certified music therapist (MT-BC) uses research and observation to assess a patient's emotional and physical well-being and then uses music to help treat the patient's ailments.

MUSIC INSPIRES THE SOUL

Music affects the listener in different ways depending on the manner in which it is used. It can help manage stress, alleviate pain, and enhance memory — or meet a specific developmental, psychological or cognitive need. Music can also be used to help relieve feelings of anxiety and depression, promote self-expression and improve self-worth.

"If a person is in pain, music therapy can be used to help calm the person, decreasing their vital signs, relaxing their musculature, stabilizing blood pressure, heart and respiration rates. The more relaxed a person is, the less pain they will experience." says Dr. Deforia Lane, Director of Music Therapy at University Hospitals of Cleveland.

Music therapy is preferred by many because music is familiar and non-invasive. "Music is a natural part of most people's life experience and as such is generally seen as a pleasurable activity. It's less threatening than some other treatments and therapies," says Lalene Kay, Director of the Cleveland Music Therapy Consortium.

Ziolek can attest to the benefits of music therapy. Through the National Association of Schools and Music, he conducts site visits, supervising teachers and music therapy students.

One session involved a 4-year-old child who had severe coordination problems. Ziolek explains, "He didn't have enough control

of his body to walk confidently without stumbling or falling down. Therapists had him balance one hand on a drum while beating the drum with his other hand, then change positions rhythmically while he was in motion to improve his sense of balance."

Another session attended by Ziolek focused on improving memory and motor skills of geriatric nuns in various stages of Alzheimer's disease. Through a session comprised of various components of music — singing *Hail, Hail, the Gang's All Here*, addressing each nun by name, playing a recording of Frank Sinatra singing *Moonlight Serenade*, and having the nuns rhythmically manipulate scarves to the music, the nuns regained muscle control.

CASE STUDIES

MUSIC THERAPY / DR. DEFORIA LANE / DR. ERIC ZIOLEK / LALENE KAY

MONEY TALKS

Why is music therapy so prominent in Cleveland's medical sector?

According to Kay, music therapy in Cleveland originated in 1966 when Anita Louise Steele received funding to create the music therapy program at the Music School Settlement. One of music therapy's pioneers, the program

has been instrumental in helping people with autism and other developmental disorders. She notes, "From there, other nationally recognized programs at [the former] St. Luke's Hospital in the 1970's, Corinne Dolan Alzheimer Center at Heather Hill Hospital in the 1980s and University Hospitals began ground-breaking programs which have been

a template for programs all over the world." Today, Cleveland's top three medical institutions — the Cleveland Clinic, University Hospitals, and MetroHealth have music therapy programs and are actively engaged in research. "These organizations are looking for the newest and most innovative ways to approach medical treatment," notes Ziolek.

CLEVELAND – A MUSIC THERAPY MECCA?

Music therapy is also successful due to the amount of funding provided over the years for both research and practice.

Founded in 1937, The Kulas Foundation is a non-profit organization that promotes music in Cleveland. A major portion of its annual funding goes toward several aspects of music, including music education, grants to music-based institutions, and music therapy. The foundation has funded research on the use of music therapy in a variety of areas including Alzheimer's disease, Schizophrenia, abused children, premature infants, burn

patients, cardiac patients, hospice patients and the homeless.

Dr. Lane, a member of the Kulas board, has read several grant proposals from physicians who collaborate with the music therapists in research.

"We're supported by physicians in many of our institutions," says Dr. Lane, "When you have this kind of support both financially and clinically and our patients respond well with this therapy on a consistent basis, it makes Cleveland a great place to be for this field."

Lane also leads an outreach program called Toddler Rock at the Rock and Roll Hall of Fame comprised of 11 music therapists who use music therapy techniques to increase the literacy skills of nearly 300 headstart preschoolers 3-5 years old. Lane explains, "PNC bank has funded us very well- \$450,000, not just to support the existing program but to expand it over a 3-year period. They look at music therapy and the art influence in the preschool classroom as being very important. That is certainly a shot in the arm for us."

UNIVERSITY HOSPITALS

In 2010, University Hospitals was nationally ranked in 14 specialties, including a #4 ranking in Neonatology (a branch of pediatrics that treats disorders and studies the development of newborn children). According to US News Best Hospitals, University Hospitals holds 769 beds with 44,634 admissions per year. Of its surgical procedures, 10,562 were inpatient and 14,801 were outpatient. In 2010, University Hospitals had an operating income of \$88 billion and employed 4,236 physicians and 12,888 non-physician employees (according to UH's 2010 annual report).

Doctors at the University Hospital Neurological Center for Music and Medicine specialize in nearly every aspect of medicine relating to music. The Center consists of over 50 health care professionals from 11 institutions in Northeast Ohio. They use music to treat a wide variety of physical and psychological disorders. The Center's goal is to facilitate healing through the exposure of patients to music.

Even more impressive is UH's nationally recognized music therapy program led by Dr. Deforia Lane. Musicians with career threatening diseases can find solace in UH's dedication to finding cures and treatment plans, which allow musicians to continue doing what they love, playing music.

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

THE CHALLENGE

As with any emerging science, it takes time to become accepted by the general population. There's a bit of skepticism that exists despite research supporting the music therapy field.

Ziolek notes, "Certain segments of the health profession won't recognize these alternative therapies as being legitimate. Some people have never heard of music therapy. I don't think people understand it well enough yet."

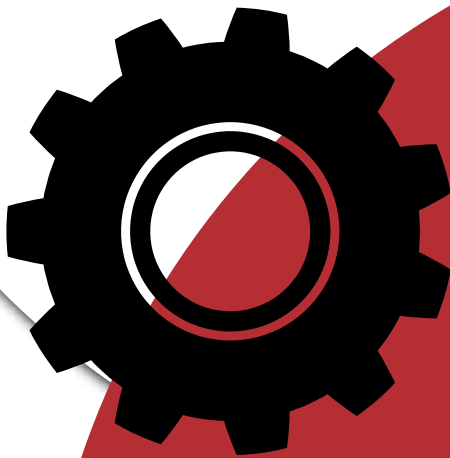
There is a need to continue educating health care professionals and the public about music therapy. Research is readily available explaining the benefits of this form of treatment. Others can surely benefit; they only need to have an open mind.

METROHEALTH MEDICAL CENTER

In 2010, MetroHealth Medical Center was noted as high performing in six adult specialties including Diabetes and Endocrinology, Geriatrics, Gynecology, Kidney Disorders, Pulmonology, and Urology. According to US News Best Hospitals, MetroHealth holds 860 beds and admits 25,746 patients per year. Of the hospital's surgical procedures 5,342 were inpatient while 12,469 were outpatient.

MetroHealth's Art Therapy program is housed in the Activity Therapy Division at the hospital. The program, which was founded in 1967, is the oldest art therapy program in the country. The Art Therapy program uses a variety of artistic outlets, including music, to achieve its goals of engaging the patient's mind and creativity to promote healing in a calm environment. Also, MetroHealth partners with Ursuline College's Master in Art Therapy student interns. Dedicated staff, therapists, and volunteers foster a nurturing and creative environment for both patients and families.

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



CASE STUDIES

MUSIC THERAPY / DR. DEFORIA LANE / DR. ERIC ZIOLEK / LALENE KAY



CLEVELAND MUSIC THERAPY CONSORTIUM

The Cleveland Music Therapy Consortium (CMTC), comprised of the Baldwin-Wallace College Conservatory of Music, The College of Wooster, and Cleveland State University, is a significant contributor to the prominence of music therapy in the Cleveland area.

The consortium offers a four-and-a-half year bachelor's degree in music therapy in which students take classes at Cleveland State University and the Baldwin-Wallace College Conservatory of Music, complete a six-month internship and pass a certification exam.

Created in 1976 through a grant from The Cleveland Foundation, this was the first music therapy degree offered in Northeast Ohio and the first in the nation involving a cooperative arrangement among educational institutions. The clinical and educational programs offered by the CMTC are recognized as unique and ground-breaking. So much so that programs from around the country continually seek information to replicate innovations the CMTC has made in the music therapy field.

Website: <http://www.bw.edu/academics/conservatory/people/Therapy/>

GOOD PROBLEMS TO HAVE

Kay mentions another challenge; the field of music therapy is expanding at such a fast rate that keeping current with research and clinical innovations is often difficult. She comments, "It's exciting and sometimes overwhelming at the same time. We have incredible resources in many different clinical

specialties as well as active researchers publishing and presenting their work worldwide."

Lane notes that despite the boom of recent years in this field, at this time there are not enough music therapists to go around. "I

don't think we have saturated the market," Lane says. "There are not too many of us yet. We are all carving niches in places, so at this point there is more to do than there are music therapists to do it."

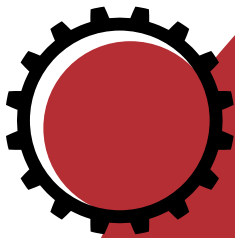
WHAT IS THE FUTURE OF MUSIC THERAPY?

While music therapy hasn't reached mass consciousness yet, it's starting to trickle in. Lane notes that patients are coming in and asking for the service by name, "I think we are really holding our own. I have more on my plate today that I hope I can get around to, and most of my colleagues are in a similar situation."

As the field develops, music therapists and professional musicians are beginning to collaborate in the treatment of patients. Lane explains, "I am not good at jazz, but I know

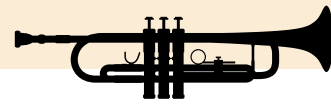
a jazz musician who is more than willing to come in when I have a support group for families of people who have prostate cancer or something like that. The musician is willing to say, 'I'll pair with you, let's do this together.' I appreciate the musicianship he has and he sees a different side to music in how I facilitate the group. We are seeing more and more of these collaborative relationships." Lane has similar relationships with the Cleveland Orchestra, the Cleveland Institute of Music, and the Cleveland School of the Arts.

While music therapy provides effective treatment, we are still learning how music affects the brain. There is a need for more research to be conducted in this area. Ziolek says, "People are starting to think that there is something in our brains that music triggers which can elicit certain kinds of physical, emotional, and social responses. They are beginning to figure out how and why that happens. I think this is something that is showing positive results. Physicians are recognizing it and use music therapy more and more. I think this field will have a future."





ACKNOWLEDGMENTS



Cleveland, like so many other cities, finds itself at a crossroads. It is caught between nostalgia for an illustrious era of industrial success and national prominence, and the uncertainty of how to respond to the realities of its current environment. Throughout history, societies have grappled with similar challenges — some adapted and thrived while others stagnated and further declined. Despite the different outcomes, all societies have found an outlet for expression, comfort, and definition through arts and culture. Beyond such intrinsic value, arts and culture is exceedingly being recognized for its potential to contribute to economic and community development. Arts and culture is a distinct asset that can be engaged by cities to celebrate their pasts and redefine their futures. Community Partnership for Arts and Culture (CPAC) believes that one of Cleveland's natural industry clusters and major competitive advantages is its arts and culture sector.

The breadth of Cleveland's arts and culture sector would be daunting as the focus of one research study and such a study would not adequately depict the sheer diversity and scope of Cleveland's dance, film, literary, music, theatre, and visual art sectors. For this reason, CPAC decided to focus on these sectors individually by conducting a number of in-depth research studies. The music sector was chosen as the starting point.

Remix Cleveland will spark new conversations of how the Cleveland Music Sector can be engaged as a partner for shaping the city's future. Remix Cleveland contains numerous analyses that can be used to synthesize efforts among musicians and the music workforce, public officials, and business community leaders in a profound way. This work is critical especially in an era when arts and culture amenities are significant forces for attracting and retaining new classes of creative workers to cities.

Just as a city's fabric is unshakably tied to its past, Cleveland's music scene is the culmination of a music legacy that contains groundbreaking performances, local talent, and music innovation. Balancing this legacy with today's technological advancements and audience expectations poses many challenges and opportunities. However, finding this balance is necessary for Cleveland and its music scene to evolve for the future.

Remix Cleveland is the result of the dedicated efforts of numerous arts and culture practitioners, academic researchers, and music industry professionals.

CPAC wishes to thank the Remix Cleveland advisory committee for its dedicated support and valuable guidance as the research unfolded. Remix Cleveland advisory committee members included Cindy Barber, Co-Owner, Beachland Ballroom and Tavern; Angelin Chang, Professor — Applied Piano, Coordinator — Keyboard Studies and Chamber Music, Cleveland State University; Matt Charboneau, Arts Network Leader, Council of Smaller Enterprises (COSE); Charles Lawrence, President/CEO, The Music Settlement; Santina Protopapa, Executive Director, Progressive Arts Alliance; Gregory Reese, Trustee, The Cleveland Jazz Orchestra; and Beth Rutkowski, Managing Director, Tri-C JazzFest Cleveland.

CPAC also extends its sincere gratitude to all of those who participated in interviews, surveys, or focus groups for Remix Cleveland. Your vital insights into the strengths and challenges facing the Cleveland Music Sector helped inform and validate this research immeasurably.

We would also like to thank the subjects of the six case studies who graciously took time out of their busy schedules to share their experiences and expertise as members of the Cleveland Music Sector. They include Cindy Barber, Co-Owner, Beachland Ballroom and Tavern;

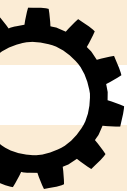
Paul Jarrett, Managing Director, Apollo's Fire; Lalene Kay, Director, Cleveland Music Therapy Consortium, Baldwin-Wallace College; Jae Kristoff, Co-Founder, Cleveland Lottery League; Dr. Deforia Lane, Director of Music Therapy, University Hospitals of Cleveland; Bill Ransom, Applied Faculty — Percussion, Cleveland State University; Vince Slusarz, Owner, Gotta Groove Records; Jeannette Sorrell, Music Director, Apollo's Fire; Ed Sotelo, Co-Founder, Cleveland Lottery League; and Dr. Eric Ziolek, Chairman, Department of Music, Cleveland State University.

CPAC would also like to thank the entire research team at the Center for Economic Development at the Maxine Goodman Levin College of Urban Affairs at Cleveland State University for their tireless work and enthusiasm in completing this project. Their expertise and innovative approaches in studying the music sector went above and beyond our expectations.

Remix Cleveland would not have been possible without the generous support of CPAC's funders. Remix Cleveland was supported through dedicated research funding from The John P. Murphy Foundation, the Rock and Roll Hall of Fame and Museum, and The Thomas H. White Foundation.

CPAC is also grateful for the continuing general operating support for its programs and services from The Cleveland Foundation, Cuyahoga Arts and Culture, The George Gund Foundation, The Kulas Foundation, The John P. Murphy Foundation, and the Ohio Arts Council.

And finally, CPAC wishes to extend its gratitude to all of those who are members of the Cleveland Music Sector. Their work makes our city, county, and region more vibrant for residents and a destination of first choice for tourists.



CLEVELAND STATE UNIVERSITY RESEARCH TEAM

DR. IRYNA LENDEL, Principal Investigator, Assistant Director, Center for Economic Development

CANDICE CLOUSE, Research Associate, Center for Economic Development

MERISSA PIAZZA, Research Associate, Center for Economic Development

SHARON BLISS, Manager, Northern Ohio Data and Information Service

DR. ZIONA AUSTRIAN, Director, Center for Economic Development

KATHRYN WERTHEIM HEXTER, Director, Center for Community Planning and Development

RENEE CONSTANTINO, Graduate Research Assistant, Center for Economic Development

MATTHEW HRUBEY, Graduate Research Assistant, Center for Economic Development

CPAC BOARD OF TRUSTEES

JAN CULVER, chair, chief fiduciary officer and director of trust, Key Bank, NA

LINDA ABRAHAM-SILVER, president and CEO, Great Lakes Science Center

HARRIET APPLIGATE, executive secretary, North Shore AFL-CIO Federation of Labor

THOMAS CHEMA, treasurer, president, Hiram College

PATRICIA CIRILLO, president, Cypress Research Group

ROBERT E. ECKARDT, executive vice president, The Cleveland Foundation

GARY HANSON, executive director, The Cleveland Orchestra

SHERYL L. HOFFMAN, vice chair, director, government relations, major and planned gifts, Cleveland Museum of Natural History

DENNIS M. LAFFERTY, executive-in-residence, Division of University Advancement, Cleveland State University

STEVE MILLARD, vice chair, president and executive director, Council of Smaller Enterprises (COSE)

TIM MUELLER, emeritus, vice chairman, Phylog

GREG PECKHAM, executive director, Cleveland Public Art

JOHN RYAN, state director, US Senator Sherrod Brown

TONY SIAS, director, Department of Arts Education, Cleveland Metropolitan School District

TERRENCE SPIVEY, member-at-large, artistic director, Karamu House

KARIN STONE, secretary, principal, Stone Strategy Group, LLC

CPAC STAFF

THOMAS B. SCHORGL, president and CEO

MEGAN VAN VOORHIS, vice president

PEGGY BARNES, office manager

SETH BEATTIE, strategic initiative director

KRISTIN PUCH, research manager

VALERIE SCHUMACHER, program coordinator

ADAM SHELDON, program associate

CPAC ADVISORS

KATHLEEN CERVENY, director, evaluation and arts programs, The Cleveland Foundation

DEENA EPSTEIN, senior program officer, The George Gund Foundation

KATHY HALLISSEY, director of community responsive grantmaking, The Cleveland Foundation

HISTORY

Community Partnership for Arts and Culture (CPAC) was formed by The Cleveland Foundation and The George Gund Foundation in 1997 to develop a regional, community-wide, strategic cultural plan. Northeast Ohio's Arts & Culture Plan (the Plan), released in May 2000, was the culmination of 9 major analytical studies and 42 regional public forums representing 30 months of quantitative and qualitative research. Upon delivery and implementation of the seven-county plan CPAC evolved into a service provider focused on filling functional gaps identified through the planning process: capacity building, public policy and research.

In 2003, CPAC launched its first capacity building program designed for individual artists, The Artist as an Entrepreneur Institute, which has served 345 artists locally and has subsequently been licensed by organizations in Florida, North Carolina, and South Carolina. In 2004, through an innovative partnership with the Council of Smaller Enterprises (COSE), CPAC helped to launch the Arts Network, a program of COSE offering professional development resources, education and networking events, benefits programs and business savings to those in the creative industries.

CPAC's research and public policy initiatives led to the formation of Cuyahoga County's first

regional arts and cultural district, Cuyahoga Arts and Culture, in 2005. In 2006, CPAC's public policy work led to the successful passage of Issue 18, a dedicated revenue stream of public sector support for Cuyahoga County's arts and culture sector, which generates \$19.5 million annually. In 2006, CPAC also designed and implemented a joint marketing group of twelve arts and cultural organizations in an effort to increase the profitability of direct marketing efforts. CPAC's continued efforts on behalf of individual artists led to the development of the first nationwide conference on artist-based community development in 2008 entitled, From Rust Belt to Artist Belt, and the first individual artist fellowship program in Cuyahoga County, the Creative Workforce Fellowship, in 2009.

COMMUNITY PARTNERSHIP FOR ARTS AND CULTURE (CPAC) THANKS THE FOLLOWING FUNDERS FOR THEIR GENEROUS SUPPORT OF THIS RESEARCH:



THE THOMAS H. WHITE FOUNDATION



ROCK AND ROLL
HALL OF FAME + MUSEUM

COMMUNITY PARTNERSHIP FOR ARTS AND CULTURE (CPAC) ALSO THANKS THE FOLLOWING FUNDERS FOR THEIR CONTINUING GENERAL OPERATING SUPPORT FOR ITS PROGRAMS AND SERVICES:



The George Gund Foundation



Ohio Arts Council
A STATE AGENCY
THAT SUPPORTS PUBLIC
PROGRAMS IN THE ARTS





About the Community Partnership for Arts and Culture

VISION

The powerful competitive advantage generated by our distinctive arts and culture sector is widely recognized and supported both publicly and privately.

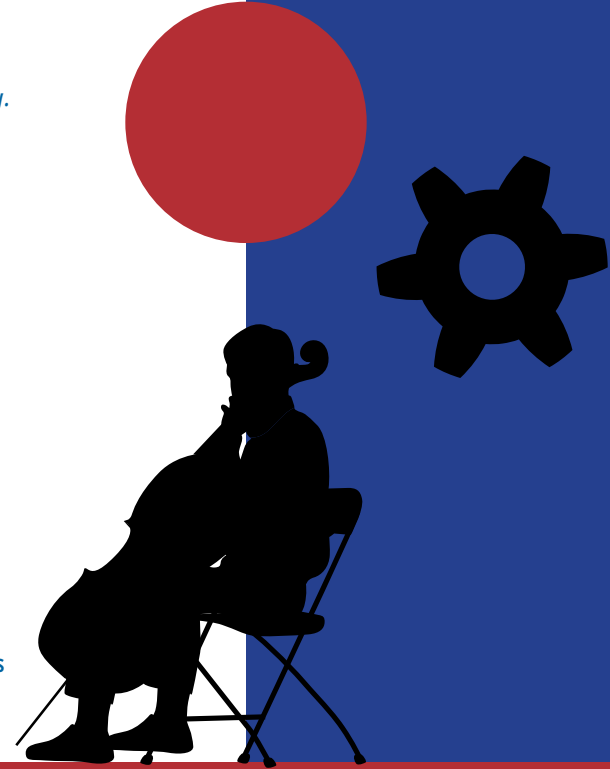
MISSION

To strengthen and unify greater Cleveland's arts and culture sector.

GUIDING PRINCIPLES

In pursuing its vision and mission and acknowledging its beliefs, CPAC will:

- **LEAD:** Set direction with the arts and culture sector based on shared interests and potential impact on arts and culture organizations and individual artists.
- **ADVOCATE:** Position arts and culture as a driving force in building a vibrant community, particularly where community priorities and funding decisions are determined.
- **EDUCATE:** Inform community decision-making through credible research that identifies solutions for evolving needs and demonstrates the contribution arts and culture makes to the economy, education and quality of life.
- **CONVENE:** Provide opportunities for the community's diverse arts and culture constituencies to join together to learn about and take collective action on shared interests and objectives.



COMMUNITY
PARTNERSHIP
FOR ARTS AND CULTURE
1900 SUPERIOR AVE., SUITE 130
CLEVELAND, OH 44114
216.575.0331
info@cpacbiz.org
www.cpacbiz.org



Maxine Goodman Levin
College of Urban Affairs

1717 EUCLID AVE.
CLEVELAND, OH 44115
216.687.3984
www.urban.csuohio.edu