

Tradition, Expression, and Recognition Creative Opportunities in the New West



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**Regional Technology Strategies and the
The Alliance for Creative Advantage
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Executive Summary

Sheridan and Johnson counties represent the best of the West's cowboy art and other cultural traditions, But limiting local art to these forms would fail to capture the growing strength and influence of the New West whose art and culture are influenced by the area's distinct environment—the Big Horn Mountains, the prairies, the wildlife, the openness—and even isolation—that feeds the creative spirit.

The creative economy of Sheridan and Johnson Counties includes an estimated 1,123 people who earn their living from the creative content of what they produce, support and/or sell.¹ Based on the number employed or self-employed in the two counties, the creative economy represents more than one in 20 people employed, which is higher than manufacturing, and about one in 14 enterprises.

The creative economy yields an estimated annual salaries/income of \$21.5 million for 2006 (employment data) and 2005 (self-employment data).

Table 1: Number of estimated companies and employees in creative economy

Type	Companies	Working (FTE)
Total, creative enterprises	176	649
Self-employed, creative enterprises	247**	247**
Total employed by public sector	--	37
Part time artists converted to full-time equivalents	--	190
Total in creative economy	423	1,123
<i>Total in all sectors</i>	<i>4,887*</i>	<i>19,406</i>
<i>Percent in creative economy</i>	<i>8.7</i>	<i>5.8</i>

* Includes 1,527 companies with employees and 3,360 companies without employees

** Includes 55 Crow and Northern Cheyenne artists in Montana

Because the definition of a creative economy is so expansive, separating it into categories, or “sub-clusters,” of creative industries that represent distinct

¹ This includes a reasonable proportion of those who earn part of their income from the arts or design converted to estimated full-time equivalents, i.e., counting three who may earn about one third of their income each as one person]; those supporting the creative economy who are employed in non-creative sectors, such as those who teach art in the schools or public sector tourism agencies; and Native American artists in adjacent regions.

competencies and markets can be useful. In order to better understand that particular needs of the various companies in the cluster, we separate them into visual and performing arts, media and digital arts, product and environmental design, and cultural heritage and preservation.

- The visual, literary, and performing artists.
- Entertainment media, and digital arts—all firms that produce, distribute, and support film, radio, television, music, and computer and video games.
- Product and environmental design, who apply art to products, packaging, advertising, and branding or design buildings, grounds, interiors, web sites.
- Cultural heritage and preservation, the public and private museums, historical sites, and cultural institutions that attract and serve tourists.

Significant findings

From interviews and survey of visual, performing, and literary artists

- Creative individuals who moved to the area were attracted mainly to the physical environment or a job, but some to the western lifestyle, to extended family, or quality of life.
- For the majority of visual artists, their art or craft is a business venture that they would like to grow, not a hobby. For nearly 40 percent, art is essential to their standard of living, and for 33% it's a non-essential source of income.
- The creative economy is highly entrepreneurial, with 75 percent self-employed, but less than one in 20 with a Dunn & Bradstreet number.
- Business is transacted in a variety of ways among the artists surveyed. This results in an undercount of the actual value of their incomes.
- Marketing outside of the region is important to local artists, and about 43 percent make more than half of their sales within the area and 56 percent get more than half of their sales from outside.
- More than three-fourths of the artists work at home and 15% work in private studios

The region has an unusually fine collection of outdoor public art. Sheridan has what may be the highest concentration of downtown public sculpture art in the nation—about 50 installations.

Foundations for growth

Learning and educational infrastructure: One of the most important foundations of the creative economy is the educational system, which generates the work force, entrepreneurs, and consumers; fills in the missing skills; and provides support services. Sheridan and Johnson counties offer numerous learning opportunities in the arts. They include: exposure in the public schools, Sheridan College's courses and programs, a variety of private programs, summer programs, including the Bauen Camp for teens from the state and selected inner cities, and two art colonies that attract writers and artists from around the world.

Sheridan College is the leading source of these opportunities, with degree and certificate programs specializing in the visual arts, ceramic arts, performing arts, and culinary arts. The College also offers a variety of arts-related courses in, for example, photography, digital arts, desktop publishing, creative writing, landscape design, and ornamentals.

The region's artists and producers acquire their skills or learn their craft in less conventional ways than most others in skilled and professional lines of work. Of the artists responding to the survey, 30 percent acquired their skills in postsecondary schools, (more than half of those attended community colleges); only one in ten attended a craft school or had a mentor; and nearly half were self-taught.

Cooperation and collaboration: The creative economy is well organized both formally and informally. The leading organization representing visual artists in the region is the Sheridan Artists Guild et al, or SAGE. It also serves as an umbrella organization for many groups that organize around specific art forms or functions, such as the Creative Fiber Guild, Northern Lights Glass Artists, Wood Carvers of the Big Horn, Sketch Addicts, and the Art Station Cooperative. Creative people, such as musicians, writers, photographers, and designers, however, lack similar networking opportunities.

Spaces and places: Places to observe and participate in the visual and performance arts are part of the infrastructure of a creative economy. The region has a number of places to stage plays, musicals, concerts, or variety shows. These include the WYO Theatre, Carnegie House Theatre, school auditoriums, the Big Red Barn at Ucross, and many smaller venues. But none of

these have the facilities that are necessary for the major productions that can attract large audiences. There are a small number of shared or cooperative workplaces operated by or for artists, such as the Pottery Depot and Art Station. Still, the region has a notable deficit of common exhibition, teaching, and work spaces, which SAGE is working to rectify.

Events and Affairs: The region is rich in events that showcase creative products and that highlight various aspects of the creative economy. According to Forward Sheridan's Strategic Plan, "over 125 annual opportunities for access to the visual arts...throughout the year" in Sheridan County alone. The College's Big West Arts Festival, Rocky Mountain Leather show, and Buffalo's Big Horn Mountain Festival are just a few of these events.

Resources: The region is home to 68 foundations, about a quarter of which support the creative economy. The Whitney Foundation is the most prominent in the arts. Business resources for the creative economy, however, are underdeveloped; financial management assistance, computer assistance, and entrepreneurial advice and assistance were all mentioned as needs.

Physical environment: The region provides an ideal setting for a creative economy environment; a spectacular natural landscape and downtowns that are not only easily walkable, but are filled with representative examples of period architectural styles from the late 1800s to the early 1900s, as well as some of later times. Sheridan and Buffalo's places on the National Register of Historic Places are the result of a well-preserved eclectic collection of buildings. The downtown streetscapes have not suffered the aesthetic consequences of strip malls and big box stores and offer a unique, and an increasingly rare kind of Main Street experience that are found in few other cities, and one that is increasingly sought by visitors and tourists. Issues to be addressed, however, include transportation to and from the region, a lack of restaurants and other activities to attract people downtown in the evenings, the diversity of opinions about its visual appearance, and inadequate signage and mapping.

Recommendations

Goal 1. Take systemic actions that strengthen the creative economy

- A. Form a Creative Economy Council
- B. Integrate the creative economy into regional development plans and programs
- C. Expand and make more inclusive networking opportunities and events
- D. Strengthen relationships with other cultures and integrate their art
- E. Encourage foundations to collaborate on funding and support for the creative economy

Goal 2. Develop and preserve the physical environment for the arts and design

- A. Improve signage, displays and mapping for the downtowns and region

- B. Support new diversified Art Centers in both Sheridan and Buffalo
- C. Repair and preserve the local architectural heritage
- D. Convert upper floor spaces to loft studios for artists and offer location incentives to artists
- E. Introduce new forms of public art that reinforce the area's regional brand
- F. Improve parking in Sheridan
- G. Develop an "art district" on North Lobban Street in Buffalo
- H. Offer incentives to attract more eating establishments to the region

Goal 3. Assist artists, artisans, and designers in more effectively marketing their work and in reaching a larger customer base

- A. Expand regional art in corporate spaces, e.g., hospitals, banks, other businesses
- B. Develop and promote a regional web-based artists registry and e-commerce site
- C. Develop and rent handsets programmed for interpretive audio tours
- D. Certify hospitality workers and shop owners as regional "Cultural Hosts"

Goal 4. Strengthen the growth of the creative economy by expanding the delivery of the programs and services at Sheridan College

- A. Establish entrepreneurial education programs and support services tailored to creative businesses
- B. Establish a dedicated Sheridan College Arts Career Center
- C. Strengthen graphic, web design, digital photography, and other technology-based occupations in creative sectors
- D. Add a historic preservation minor to sustainable building or construction programs

Goal 5. Increase the use of art and design in more of the area's locally produced goods and services.

- A. Identify opportunities for branding and linking local artisanal foods and personal care products to the culinary arts
- B. Increase the use of regional products by builders, architects, and designers.
- C. Develop incentive packages to attract and retain young designers or bring more artists to the area

Goal 6. Promote the region's creative assets more effectively and aggressively

- A. Produce a regional magazine on local arts, entertainment, and culture.
- B. Encourage increased media coverage
- C. Establish Western arts and heritage trail from Kaycee to Billings as a "museum without walls"

Tradition, Expression, and Recognition: New Opportunities in the Old West

*"You can't deal with a region like the West and ignore the road most traveled. I take advantage of the high context relationship with the reader, meaning that I respect them to understand when I'm lampooning preconceived notions that we all developed from watching The Lone Ranger."*² Conversation with Ucross author Craig Johnson, p. 5.

I. Introduction

For most outsiders, Sheridan and Johnson Counties have the kind of distinctive identities that many other places can only hope to achieve. No one traveling through either county would doubt the presence of the impressive art and culture, which can be seen on the streets, in the architecture, and in the products sold.

In the best selling *1000 Places to See Before You Die* Sheridan is described as "the kind of town that would be a cowboy open-air museum if it weren't so full of life—and it always has been." King's Saddlery western museum offers one the best collections of leather art anywhere. Just to the South, Johnson County played a central part in the history of the old West, the site of the range wars between cattlemen and shepherders, of Indian wars, and the home of the Hole in the Wall gang. It, too, retains a distinctive western flavor. Ranking Sheridan as one of the 100 Best Art Towns of North America in 2002, the author writes, "Cowboy cultured...and proud of it....Sheridan's visual arts scene is one of the nation's top markets for western traditionalist art."³

Sheridan and Johnson Counties represent the best of the Old West. Cowboy and western art are alive and well in the area, with some of the most stunning saddles, bridles, bits, and spurs found anywhere in the world. But this reveals only a part of the area's artistic assets. Sheridan and Johnson Counties are far more than their Cowboy traditions might suggest. Limiting the scene



² Craig Johnson, *The Cold Dish*, London: Penguin Books, 2005, Conversation with author at end of book, pg. 5.

³ John Villani, *100 Best Art Towns in America*. Santa Fe: John Muir Publications, 1996.

to cowboy traditions and culture fails to capture the growing strength and influence of the New West, the art and culture that are influenced by the Big Horn Mountains, the prairies, the wildlife, the openness—and even isolation—that feeds the creative spirit.

The popular image doesn't capture the breadth of creativity embedded in the digital arts, design, and technology sectors, which are driven by talented people who are departing the congestion and costs of metropolitan areas and are drawn by, and adding to, the area's creative environment. Artistically inclined people from the west and east coasts are attracted to this part of Wyoming, inspired by the picturesque natural terrain, openness, and abundant wildlife. The area also is more ethnically diverse than the traditional cowboy culture might suggest, with a large Basque community in Johnson County and new immigrants, largely students, coming to enroll in the college. It's a place that recently attracted a standing room-only audience to hear a Tibetan monk discuss Buddhism. Both traditional and contemporary arts and culture will play a large part in determining the economic and cultural future of Sheridan and Johnson Counties.

A Changing Economy The region, and in fact, most of Wyoming presently have a strong economy but one that still is commodity based and depends largely on mining. Wyoming received one of the few overall "A" ratings on CfED's *2007 Report Card of the States* on the strength of its education, health care, and housing, a major achievement after getting mostly "D's" in the early 90s.

At present, the state has one of the strongest economies in the nation but still has about one in ten living below the poverty line. Sheridan and Johnson Counties appear to be weathering the recession quite well. The small size of their manufacturing base—due largely to a relatively small labor pool, distance from markets, and, in the past, lack of real interest in recruiting manufacturing—and large number of entrepreneurs has minimized the impacts of globalization. This has, perhaps unintentionally, positioned the region quite well for a future in which economic sustainability will depend more on mining minds than making gizmos or mining minerals.

It is likely to be the creativity, talents, and entrepreneurial drive of the people that shape the region's economic future. The region's creativity as embodied in its people, in particular, offers one road to economic sustainability. It represents a fount of wealth, an asset that can be used in many sectors to provide advantage; an attraction to small mobile technology-dependent entrepreneurs and companies, tourists, and conferences; and a source of pleasure for the community.

II. Digging below the data: Estimating the size of the creative economy

“Despite an urban affinity, the creative class—perhaps more able and apt than others in the workforce to choose where to live based on quality of life considerations—can be drawn out of cities to high-amenity locations.”

The Creative Class: A Key to Rural Growth, McGranhan and Wojan, 2008

Economic data fail to capture the full range of the creative economy, the businesses that depend on art and design, the self-employed, the artists who have other primary jobs or who use art to supplement their incomes, and the effects on peoples' choices to visit or live in the region. Only a piece of it is easily visible to the casual observer—or even to the careful analyst.

Measuring the size of the creative economy is much more of an art than a science. Using only data collected by government sources inevitably misses a large segment of the true creative economy because of the nature and structure of the creative economy. It's populated by large numbers of micro-enterprises, self-employed people, secondarily employed people, and companies and people that are classified by government sources as non-creative sectors.

The government databases combine “art, entertainment, and recreation” into a single category, which inflates the official numbers by adding recreation sectors. But it undercounts these categories by omitting large numbers of creative companies registered as having no employees (although many do, as family members, apprentices, and helpers), those who report in sectors that can't be called “creative,” and those who simply don't report.

To derive the estimated numbers shown in Table 1 and Table 2, we began with the estimated unemployment insurance data, corrected it with Dunn & Bradstreet data using the same industry codes, added information from national self-employment records, supplemented that with information from the phone directory, and finally added what we learned from memberships in local associations and from the 79 interviews conducted.

The creative economy of Sheridan and Johnson Counties includes an estimated 1,123 people who earn their living from the creative content of what they support, make, and/or sell. This includes a reasonable proportion of those who earn part of their income from the arts or design converted to estimated full-time equivalents (i.e., counting three who may earn about one third of their income each as one person); those supporting the creative economy employed in non-creative sectors, such as those who teach art in the schools or public sector tourism agencies; and Native American artists in adjacent regions.

Based on the number employed or self-employed in the two counties, the creative economy represents more than one in 20 people employed, which is higher than manufacturing, and about one in 14 enterprises.

Economic Impact: Because of the source of the data, it is not possible to calculate the precise income derived from this cluster. But combining the salaries associated with the number of creative businesses listed by industry classifications in the IMPLAN data base with the sales of the self-employed, and factoring that sum to the adjusted size of the creative economy using all sources of information, **yields an annual salaries/income of \$21.5 million for 2006 (employment data) and 2005 (self-employment data).** This is only a rough estimate, of course. For example, the self-employment data is not earnings but sales, which overestimates somewhat. Yet because the total size of the creative economy is very likely underestimated, the figure is probably a reasonable estimate.

In addition, the business establishments that are part of the creative economy are **major contributors to the tax base** of each county. In downtown Sheridan, for example an estimated 37 businesses, or 56 percent of the downtown establishments, represent or sell products of the region's creative economy.

Table 1: Number of estimated companies and employees in creative economy

Type	Companies	Working (FTE)
Total, creative enterprises	176	649
Self-employed, creative enterprises	247**	247**
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Part time artists converted to full-time equivalents	--	190
Total in creative economy	423	1,123
<i>Total in all sectors</i>	<i>4,887*</i>	<i>19,406</i>
<i>Percent in creative economy</i>	<i>8.7</i>	<i>5.8</i>

* Includes 1,527 companies with employees and 3,360 companies without employees

** Includes 55 Crow and Northern Cheyenne artists in Montana

The totals presented in Table 1 dig much deeper than the data typically used by economic development agencies. The commercially available employment data that includes estimates for suppressed data, for example, lists for the entire state of Wyoming only 7 landscape architectural services and only 56 independent artists, writers, and performers, numbers that obviously undercount

those sectors. The creative economy of Sheridan and Johnson Counties, based on the most commonly used national data base—that uses complex algorithms to estimate suppressed data—would produce 63 companies and 343 employed. Hence, we looked elsewhere to supplement the data—Dun & Bradstreet, phone directories, web sites, and association memberships.

In addition to the creative economy in the two counties, a large number of Native American artists are members of the Crow and Northern Cheyenne tribes bordering the region on the north—55 listed with the Montana Tribal Tourism Alliance. They produce and sell water colors, paintings and prints, clothing and shoes, silver and beaded jewelry, rugs, and handmade dolls. Others are writers and musicians.

Table 2. Sample of Creative Companies in Phone Directory

Category	Number listed
Architects	11
Art galleries	9
Artisanal foods	4
Interior designers/decorators	10
Commercial artists	1
Florists	5
Graphic services or design	6
Interior designers/decorators	10
Internet marketing	2
Internet web design	9
Landscape equipment and supplies	7
Music instruments-dealers	5
Museums and historical sites	8
Newspapers	4
Photographers	9
Video production	2

A. The Creative Economy Value Chain

What distinguishes a cluster analysis from a sector analysis is its attention to interdependencies, the relationships of the core sectors to related sectors that either supply or support it and that move creative products or ideas to their final markets. The term *creative economy cluster* spans the entire art and design value chain that begins with those resources needed to produce the arts and design that characterizes the cluster. Ceramics artists, for example, need clay, tools, kilns, and skills; musicians need instruments and benefit from agents, sound equipment, and supplies; weavers need yarns, looms, and bobbins.

The most notable source of supplies for the region's creative enterprises are those firms that reflect the region's history and traditions. Sheridan County has some of the best suppliers of leather tooling in the nation. King's Saddlery, for example, supplies equestrian outfitters all over the world. For other art forms, however, the region lacks the scale of demand to support a more extensive range of suppliers, and local resources are limited to distributors of more basic art supplies, photography equipment and materials, sewing and quilting supplies, and landscape equipment. The nearest art foundries for sculptors are in Cody or Lander.

Local visual artists, therefore, have become accustomed to finding what they need elsewhere, and the lack of local suppliers has not proved an impediment to the success of the cluster. One fabric artist managed to convert the need for supplies into a business opportunity, designing equipment to address common sewing needs and marketing them internationally on the Internet (<http://www.sewunique.com>).

Table 3. Examples of local suppliers

- Sheridan Leather Outfitters (leather supplies)
- Barry King (leather tools)
- Green Parrot (stamping tools)
- King Saddlery (leather tools, supplies, equipment)
- Landscape (equipment and supplies)
- Photo finish (supplies)
- SewUnique (accessories)
- ET Quilts (quilting and sewing supplies)

Another step in the value chain is reproducing art for larger markets, whether as lithographs, glicees, cast sculptures, published literature, or recorded music. Most reproductions of art, whether visual, literary, or musical, must be sent elsewhere. For artists, this does not seem to be a problem. The leading

designers with sophisticated printing needs, however, are constrained by access to capable and affordable printers, and thus they go outside the region. The region does have two commercial lithograph printers, a flexographic printer, and two commercial screen printers plus the ability to meet local needs for basic photographic reproduction.

The other end of the value chain consists of the marketing, distribution and sales of the various art forms, the galleries, shops, wholesalers, and web sites,

B. Dividing into Creative Sub-Clusters

Since the definition of a creative economy is so expansive, it's useful to separate it into categories, or "sub-clusters," of creative industries that represent distinct competencies and markets. We have divided it among visual and performing arts, media and digital arts, product and environmental design, and cultural heritage and preservation.

- The heart of the creative economy is the visual, literary, and performing arts, those who produce the artistic and cultural content that provides other sectors with competitive advantages and creates a demand for supplies, support, organization, skills, reproduction, and distribution.
- The entertainment media, and digital arts sub-cluster includes all firms that produce, distribute, and support film, radio, television, music, and computer and video games. Traditionally concentrated in large cities, this sub-cluster is increasingly relocating to smaller towns due to the high costs associated with expensive metropolitan areas and the readily available virtual networks.
- The product and environmental design sub-cluster encompasses the commercial application of the arts to the environment, products, packaging, advertising, and branding. It includes all those who design buildings, interior or exterior space, web sites, advertising materials, or companies that compete on the artistic quality of their products. The sub-cluster includes architects, interior designers, design furniture companies, artisanal foods for niche markets, advertising, web design, and landscape designers.
- The cultural heritage and preservation sub-cluster consists of public and private museums, historical sites, and cultural institutions that attract and serve tourists and provide distinguishing features for communities.

While having individual interests and characteristics, together they do make a coherent whole that covers enough common ground to justify special attention and particular interventions that meet their common needs.

The four sub-clusters may not add to the totals in the creative economy because some companies fit multiple criteria. Kings Saddlery, for example, manufacturers products, sells art, and operates a museum meeting the criteria of three clusters; Deerfield in Buffalo operates a gallery, coffee shop, and is a performance venue.

Table 4: Companies and Employment by Sub-Cluster

Sub-cluster	Companies	Self Employed	Other Employed	Total Employment
Visual, Literary, Performing Arts	51	137	37	641
Entertainment & Media	32	4	0	203
Product & Environment Design	65	43	0	234
Culture Heritage & Preservation	9	0	3	45
Total	167	184	40	1,123

Table 5: Examples of sectors included in the various sub-clusters

Visual, Literary, Performing Arts	Entertainment & Media	Product & Environmental Design	Cultural Heritage & Preservation
Independent Artists, Writers, & Performers	Sound Recording	Interior Design	Museums
Photography	Radio Stations	Graphic Design	Historical Sites
Fine Arts Schools	Television/Cable	Architectural Services	Grantmakers
Art Dealers	Motion Picture Video Production	Ornamental Metal Work	
Book Stores	CD/Record Stores	Custom Woodwork	
Printing	Internet Broadcasting	Advertising	
Pottery	Agents & Managers	Floriculture	
Taxidermy			

Much of the information underlying the following sections came from 63 responses to a web-based survey of artists in both Sheridan and Johnson counties and 85 responses to a web-based survey of businesses in Sheridan County. This information was supplemented by personal interviews or focus groups with 79 individuals representing themselves or their organizations plus an in-depth survey of newspapers, books and magazines, studies and reports, and web sites.

1. The visual, literary, and performing arts sub cluster

The traditional definition of the arts focused on the “pure” arts, as cultural rather than commercial goods. Much of the work of visual artists, writers, and performers fall into this category, although many craftspeople cross over into the arts, providing functional use as well as aesthetic beauty. This group also represents a primary source of creativity and inspiration for many other sectors of the economy. It is also the most difficult in which to earn a full-time living, and depends more heavily on grants and/or other sources of income than other creative sector.

Within this sub-cluster, each of the three different art forms has its own distinctive character and needs. Visual arts includes painters, sculptors, ceramicists, and photographers; literary arts includes novelists, poets, and non-fiction writers; and performers includes musicians, actors/actresses, and dancers. Each subset has its own networks, sources of inspiration, connections, and strengths and weaknesses.

Factors ranked in importance to the success of artists

1. Marketing assistance (60%)
2. Access to external markets (54%)
3. Exhibit space (54%)
4. Networking (38%)
5. Skill development/education (34%)
6. Funding (30%)
7. Affordable studio space (28%)
8. Business/financial management (22%)
9. Computer assistance (20%)
10. Affordable housing (20%)

Place matters deeply to the creative economy. Increasingly, talented individuals and talent-dependent small companies can locate anywhere. But in selecting that “where,” *place matters*. The artistic people that form the core of the region’s creative economy, whether they produce traditional, contemporary, or modern forms of art, draw upon the regional context, the history, setting, and culture, for many of their ideas and inspiration. One writer talked about the regional advantage of being provided with a theme and content material by being able to write about a region that is not well known outside of the state, of providing him with a theme and content. But artists also operate in a larger context. Creative goods are consumed in a social context, not in isolated circumstances. Success depends in part on a complex social and economic support structure that can provide information about new techniques, styles, or markets as well as critique and validation.

Most artists are in-migrants. Three out of four artists surveyed moved to the area from somewhere else. Those who moved to the area were attracted to the

physical environment or for a job, but other reasons mentioned by multiple respondents were the western lifestyle, to be closer to extended family, and quality of life—especially the schools and family-friendliness, and recreational opportunities.

Of those who moved to the area (allowing for multiple answers):

- 35% were attracted by the physical attractiveness
- 30% for a job
- 15% for a spouse's job
- 3% to be in an artists community
- 47% for other reasons (e.g., quality of life, family, western lifestyle)

Those participating in focus groups and interviews mentioned similar reasons: quality of life (i.e., schools and sense of community), small scale, and concentration of other artists.

Only a minority of the more than 500 artists living in the two counties are able to earn a full time living from the arts. Most don't live off their earnings as artists, either because they have other sources of income or a working spouse or because it's mainly a hobby (about a third).

For the majority of visual artists, their art or craft is a business venture that they would like to grow, not a hobby.

Nearly two in five said that their art is essential to their standard of living, and another third said it's a source of income not essential to their livelihood. Less than one in four consider their art a hobby rather than a business operation, although most want to sell their products. Most of those in the performing arts are either amateurs or perform as a second source of income. Among visual artists, photographers, quilters and sewers, actors, and wood carvers are most likely to view their art primarily as a hobby or leisure activity. Janet Hoxie estimates that only about one in ten of the 100 or so members of the Creative Fiber Guild earn a living from their craft.

Janet Hoxie, an entrepreneurial fiber artist has invented various ways to solve problems and improve the process of sewing, quilting, and beading. With her husband, she formed a company, **SewUnique**, to reproduce and sell these products, which include a cutting attachment to sewing machines, cutting templates, patterns, and a "quilt tamer." **SewUnique** manufactures some of its products but contracts most out—to Riverton, Seattle, Denver, and even Alabama. Web sales have come from

Writers and musicians, in particular, have a difficult time supporting their art and the vast majority either teach or have other full-time jobs. Among musicians, the most successful must be willing to market themselves and their work and to travel extensively. A focus group of musicians agreed that “the local mentality is not to support music. People want it free.” In each category, however, there is a minority of artists who have established reputations. Northern Cheyenne musician Gary Small has played with some of the best-known artists in the country, and has been able to support his group. Author Craig Johnson has also turned his craft into a successful career, using the local environment as settings for his mystery novels.

With respect to income derived from art:

- For 14% it's their primary and essential income
- For 22% it's secondary but still essential income
- For 6% it's primary but not essential, either because they are retired or have savings
- For 31% it's secondary and not essential
- For 31% it's mainly a hobby (highest among painters, quilters, and carvers)

Some who supplement their art do it through in other aspects of the creative economy. A large number teach in the public schools, college, or offer private lessons. Some teach to support their art while others do their art or free lance as designers or commercial photographers to supplement their teaching income. Others double as gallery owners, or, in one case, as a landscape architect. Many of those not earning a full time living through art still generate income that they considered essential to their standard of living.

The creative economy is very entrepreneurial. This sub cluster, in particular, is defined by entrepreneurs. While there is some degree of routine in any production process, success in the creative economy depends much more on differentiation and continual innovation. The raw materials of the creative economy are ideas, and the processes are the conception and transformation of goods and services to give consumers both performance and pleasure.

Forward Sheridan's report found that 27 percent of the businesses in Sheridan County are entrepreneurs. A large number of those entrepreneurs are part of the creative economy—plus many that were most likely not included in the report for the following reasons.

- Virtually all of those earning a living selling their art are unincorporated as a business (with only one exception).
- Nearly three in four claim to be self-employed, and the rest are either hobbyists, teachers, or part of the informal economy.

- Only three of the respondents have Dunn & Bradstreet numbers, which are the source of data for many analyses of the creative economy.

Most artists try to create, not respond to, market demand.

- Three in five create and then try to sell.
- One in ten works on commission.
- One in six uses the market to influence what they produce.

Business is transacted in a variety of ways among artists surveyed. As a result, many tend to undercount the actual value of the incomes. Artists, perhaps more than any other producers of goods, are frequently asked to donate their work to fund raising auctions, sales, or exhibitions. Art also is a commodity that is frequently bartered, and may or may not be reported as earned revenue.

Based on the survey:

- two thirds of all respondents barter some of their art for goods or services
- half of those willing to divulge information about their income (about half of all respondents) donated more than 20 percent of their total "sales"
- one quarter of those answering the question about income say they report less than 80 percent to the IRS, and that figure is most likely conservative, reflecting national patterns

Marketing outside of the region is important to local artists.

- About 43% of artists derive more than half their income from sales within the area and 56% get more than half from sales outside the region.
- Tourists are not as large a market as expected, responsible for less than a quarter of all sales for about 73% of respondents. Only three respondents sell more than half their art to tourists.
- Of those that sell to other areas, the vast majority is out of state. Only one respondent sells half or more in other parts of the state.
- The Internet is not a significant source of business for local artists. Only three artists make more than 10% of their sales via the Internet. Yet in 2007, 93 western belts were purchased (on-line) from Sheridan's High Mountain Mercantile to be given out to all female Emmy Award nominees, an indication of the unrealized potential of the web.

Although the region has a large number of cultural events, including theater, Sheridan businesses only attribute a small part of their sales to these activities.

Only 16 percent of responding businesses make more than 25 percent of their sales from events. Nearly half (46 percent), however, say that public art contributes to sales, and for about one in ten, these are significant contributions.

Most of those in the creative economy who are not visual, literary, or performing artists—the designers, architects, the media, and manufacturers—work full time at their craft and are dependent on earnings from their creativity.

Work space is not considered a deficit for most visual artists. The majority work in their homes or at studios at their homes, and therefore find their work space affordable. There are a few places set up for artists to work, including the Pottery Depot in Buffalo, which has a half dozen potting wheels, holds classes, and allows ceramic artists to use the space. There are also two well-known art colonies that offer artists and writers shared space and resources during their residencies.

- More than three-fourths of the artists work at home.
- 15% work in private studios.
- None of the 56 respondents works in a shared space (although there are shared spaces such as the Pottery Depot and Sketch Addicts studios)
- 57% find their space adequate for their needs but 30% do not.
- 68% find space reasonably affordable.
- 8% say it's expensive but worth it, only two artists found it too expensive.

Although two in three said the cost of workspace is reasonable, it may be because they work at home; many would prefer, however, to have a studio outside their home if they could afford it.

Because the area has a limited market for performing arts, those few who are pursuing a career as a musician or actor/actress have to travel extensively and depend heavily on agents in other cities, and draw their incomes from elsewhere. At the same time, the local region can provide can them with a unique identify and a source of artistic inspiration.

The most visible sources of regional art are galleries and art stores, which are also considered part of this sub-cluster (Table 6). Bozeman Trail Gallery has a national reputation, carrying the work of well-known deceased artists and better-known western artists. That gallery advertises in national and western art magazines and does about 40 percent of its business through contacts on its web site. Margo's Pottery and Fine Crafts in Buffalo carries her own ceramics and works of other local artists but also offers a range of high quality crafts from other regions of the country, and Lucinda's carries crafts from many parts of the West. But increasingly, gift stores, restaurants and coffee shops also display and/or sell art, often for new or rising artists seeking exposure or to make the environment more attractive to customers. The Bozeman Trail Steak House and Rib and Chop House for instance, have art on the walls for sale. Arby's in Sheridan is a treasure trove of historical photographs of the area restored by a local artist.

Table 6: Galleries that show or sell art

- Margo's Pottery and Fine Crafts
- Hitching Post
- Pottery Depot
- Davis Gallery
- Foothills Gallery
- Bradford-Brinton
- Bozeman Trail Gallery
- Lucindas
- Plaza Gallery
- Deerfield
- Sheridan College Downtown
- Sheridan College Main Campus
- San Benito Monastery
- Art Station
- Downtown art
- Ucross
- Custer Battlefield Trading Post

Exhibit space is a prime concern to visual artists. Artists contend that both counties offer too few opportunities for artists to show their work. The most pressing need in Sheridan is for a space that could house galleries, SAGE offices, studios, and classes. A number of those interviewed indicated the need for a visual art center to exhibit art and to provide work studio space. It's especially difficult for some artists, such as metal artists, who require large installation spaces to show their work.

Artists differentiate between places that exhibit art and the business establishments that sell their art. Galleries and shops do represent places that visitors come to view art, and they offer greater exposure to individual artists. Yet gallery owners contend that they are underutilized by local artists who want to avoid paying the commissions that galleries must charge in order to stay in business (most take a 35 to 45 percent commission, which is less than the typical 50 percent charged in Asheville, North Carolina, for example). Owners estimate that only about one in four local artists choose to sell through their galleries. Most galleries include art from other regions of the country and imported art, which adds to the diversity of art available locally but without the seal of regional authenticity.

Businesses also responded to questions about the adequacy of performance spaces, and theirs were mixed. Almost half (48 percent) of businesses said that spaces were either "well" or "somewhat well" developed. On the other hand, 52 percent said they were "quite" or "somewhat" underdeveloped.

Many artists also commented on the **lack of awareness of the quality and value of their art**. Consumers still expect to pay no more than \$300—the same average price as a decade ago—whether it's a simple cup, detailed landscape, or elegant sculpture, even though costs have risen significantly. Musicians have had similar experiences, with customers expecting to pay caterers for expensive food at an event but expecting music at cut-rate prices. Part of the problem is attributed to mixing lower end and higher end art, which tends to depress the price of higher end art rather than raise the price of lower end art.

Affordable housing is a serious problem in Sheridan. Nearly 80 percent of respondents said affordable housing is “not well developed” or is “undeveloped.” A specific concern was the lack of affordable space available to buy or rent for workers in the creative economy. Renting or buying buildings for retail stores in the downtown is also expensive

2. Entertainment production and media

Entertainment and media is a sub-cluster that tends to concentrate in large metropolitan centers like New York, Los Angeles, Austin and Nashville or in less populated regions that have been able to carve out and maintain a particular niche, like the Mississippi Delta or Durham, North Carolina with jazz, Sundance with movies, and Appalachia with bluegrass. Even though Sheridan and Johnson Counties are home to a large number of fine musicians and the growing Wild West Video Productions, this cluster is not particularly well developed and still lacks the scale to support the technical production facilities that are available in larger cities. The region lists only three motion picture and video production companies and one sound studio, and local musicians record as far away as Washington and New Jersey. At least one musician, David Munsick, however, has his own home-based recording studio. The few film festivals, namely the Sheridan Film Festival and Bennett Street Film Festival in Buffalo, are not sufficiently publicized to be major events that attract outsiders.

The major economic impact of this sub-cluster comes from the news and broadcast media. The region is home to seven radio and television stations, and five periodical publishers, and Fiberpipe Internet Services is the largest regional provider.

3. Product and environmental design

Art is not only a product in itself but it is applied to a variety of other forms of products and businesses in ways that are either essential, as in graphic design, or advantageous, as in fine furniture. Design can provide market advantages that

can withstand global competition because authenticity is valued as more important than price. A key strength of the two counties is the integration of western and mountain art and design into a range of authentic building elements and home furnishings, and the architecture, interior design, and landscaping that together represent a regional identity and brand.

Product Design

Sheridan and Johnson Counties have a small but significant number of “product design” companies that depend on art and design for their sales (Table 7). These cluster around four types of products: *leather and accessories; metal architectural accessories and furnishings; customized mountain homes; and artisanal foods*. The weavers and sewers that produce fashion goods were included with the artists since most are individual and part time.

Table 7: Examples of Design Product Companies

Western and riding goods	Custom Cabinetmakers	Ornamental metal	Artisanal foods and personal care products
Kings Saddlery Tom Balding Bits & Spurs Stag Grips Custom Cowboy (See Table 8 for additional names)	Blacktooth Cosner Construction JBD	J Wright Ironworks Frontier Ironworks Iron Mountain Anvil Arrowhead Forge	Carder Enterprises Benedictine Sisters Roasters Guild Sanford’s Brew Pub Brundage St. Wines Creek Side Soapworks Sheridan Bakery Kolitska Whiskey

Leathercraft, riding supplies, and accessories represent the region’s best-known design products and are a large part of why Sheridan is on lists of the nation’s top art towns and tourist destinations (Table 8). Its companies produce for international markets, attract international visitors, and are major tourist destinations. Sheridan attracts hundreds of leather crafters, suppliers, and buyers to the nation’s largest leather show each May, the Rocky Mountain Leather Show.

This western art economy, anchored by King’s Saddlery, is perhaps the best-known source of high-end saddles in the nation, known worldwide as the birthplace and primary source of “Sheridan Style”



saddles. Although leather working had been a staple of the Wyoming economy for more than a century, Don King made it an art. After apprenticing with an expert saddle maker Rudy Mura and later ranching, in 1957 he turned to full time saddle making and leather tooling. King's Saddlery employs about 30 people in Sheridan, including seven leather crafts, and sells a wide range of riding gear and accessories including top quality ropes.

Over time, King developed his own unique style of complex patterns of wild roses using unusually deep stamping to achieve greater depth. Eventually, this style came to be called the "Sheridan-style," and his saddles have been acquired by Queen Elizabeth, Ronald Reagan, and the Crown Prince of Saudi Arabia as well as various art museums. His designs have also earned him the Governor's Award from the Wyoming Arts Council and recognition from the National Endowments for the Arts and National Heritage Foundation.

Due in large part to his influence, over the past three decades, Sheridan has become an international center for leather art. Some of the area's top leather artists, including his four sons, apprenticed under Don King. He and his students have spawned dozens of other leather artists in the area and elsewhere who are producing high quality saddles, leather belts, book covers, cases, and a wide array of accessories and tools that are known and purchased all over the world, even without major advertising campaigns. A sign often seen in the leather area at King's Saddlery is "we're taking no new orders for the next 3 months."

Largely as a result of some of the leather artists who got an early start at Kings Saddlery, Custom Cowboy, Sheridan has become a thriving leather art cluster that includes about 20 independent leather crafters (half a dozen full time and the rest supplementing other jobs); tool makers and leather supply stores; silversmiths who make buckles and bridles that go with the leather goods; and shops that sell the leather crafts.

Local musician and songwriter Dave Munsick reminisces about the craft on his recent CD *Old Wood*, in "Leather was my Home," with a refrain in the song "my first stop was a leather shop everywhere I'd go...."

Sheridan Leather Outfitters is one of the region's largest suppliers of leather, tools, stamps, and hardware. Artists like Tom Balding, who invites tourists to watch him produce his buckles, bits and spurs and William Rogers Jennings, who makes



custom grips for handguns out of elk antlers with the aged look of older traditional six shooter grips, round out this classic western goods cluster.

Table 8: Sample of Leather Artists, Goods, Supplies, Tools, and Accessories

Leather artists and establishment	Employees
Kings Saddlery	30
Custom Cowboy Shop	2
Dooley's Leather	2
William Hape	1
Clint Fay	1
Paul Vandyke	1
Sheridan Leather Supplies	5
Tom Balding Bits & Spurs	2
Barry King's Tools Machines (tools)	1
Western Leather Creations	1
Bob Douglas (tools)	1
D&J Coins and Leathercraft	2
Hugh Weaver	1

Home furnishings and architectural elements is a smaller but potentially high growth sector of the creative economy, particularly given the investments in new, large first and second homes in the state. This sector includes primarily hand forged iron furnishings and accessories but also a small number of companies that design and produce custom wooden cabinets, furniture, and doors.

Frontier Ironworks in Buffalo makes hand forged products such as chandeliers, beds, and benches in western and Native American themes that use rawhide, antlers, and other natural materials. Iron Mountain Anvil, which also has a site in Tennessee, produces ornamental hand forged iron pieces both to order and for sale in galleries. It advertises furnishings that “reflect Western values, aesthetics, and lifestyle...timelessly simple in line and form.” At Arrowhead Forge in Buffalo, in what the town hopes will become its Arts District, David Osmundsen has been designing and creating functional and ornamental hand forged gates, railings, fireplace screens, and other pieces for home or business for more than 30 years. David also apprentices others and runs a iron art and blacksmithing school. Cosner Construction has a designer and four employees that make customized cabinets and furniture pieces, such as armoires.

Artisanal foods and personal care products that represent the region are now a small niche market but perhaps have one of the best potentials for expansion. At present, they consist of a small number of products that sell both retail and wholesale. Some products, including Coyote Ketchup, Chokeberry Syrup, have been branded in some way to the western culture and resources. Sheridan Baking Company produces exceptional baked goods and granolas for Java Moon and other local businesses. A few other companies make soaps, candles, and other items that complement the food products.

Graphic and web design is another leg of this sub-cluster. As the Internet becomes the main highway for business transactions and competition expands, finding ways to distinguish companies and products relies more on the creativity of web sites and advertising. This sector of the economy has grown in its use of art work. The region is home to a small but high quality group of designers. The largest is Bella Graphics, but there are also six other graphic design companies and five advertising or advertising services companies. The national and regional demand for such services is growing.

Environmental Design

The environmental design sector, which includes structural architects, landscape architects, and interior designers, is dominated by freelancers and self-employment. Although the national data base only shows seven in the two counties, the self-employment data and phone directories reveal that there actually are:

- 11 architectural services
- 8 landscape designers
- 10 interior designers

Given the growth in the permanent population and the development of second homes, this represents a major opportunity for both designers and manufacturers of customized homes and home furnishings and accessories. Examples include:

- Armstrong Design Studio
- Creative Interiors by Kathern
- Interior Design Consulting

4. Cultural heritage and preservation

This sub cluster is primarily the museums and historical sites that display and inform people about the region's culture, history, art, and legends. It also includes the foundations that support them and, where they exist, the companies that restore and preserve the past. Because of the region's colorful and eventful history, Sheridan and Johnson Counties have established a wealth of historical and cultural sites that attract tens of thousands of visitors each year. Some of the most popular are listed in Table 9.

Table 9. Some popular historical and cultural destinations

- Jim Gatchell Memorial Museum in Buffalo, started as a drug store and is now a museum that houses one of the richest collections of frontier artifacts in the Rocky Mountain West.
- Occidental Hotel has maintained its 19th century historic interior and uses the fame of its past guests and connection to the Virginian to establish its reputation.
- Bradford Brinton Memorial & Museum in Big Horn has one of the West's finest collections of western art.
- Fort Phil Kearney is a partially recreated fort and a museum, as well as a site of some of the last battles between the U.S. Cavalry and Native Americans.
- Outlaw Cave is the legendary place where Butch Cassidy and other infamous outlaws once successfully hid out.
- Sheridan Inn, built in 1893 and once co-owned by Buffalo Bill, is under renovation but holds great promise for Sheridan as an addition to the city's history and a potential high-end restaurant and inn.
- Sheridan County Museum has a touch sensitive kiosk with historical photos of area and information about events.
- Trail End Museum in Sheridan, on the Register of Historic Places since 1970, is an authentically furnished 1913 home of a cattle rancher who became Governor and U.S. Senator of Wyoming.
- Hoofprints of the Past Museum in Kaycee offers exhibits of the general history of Johnson County including the Hole-in-the-Wall, Johnson County Invasion, Dull Knife Battlefield, Fort Reno, and the Bozeman Trail.
- Kings' Saddlery has a crowded but interesting museum of riding equipment, western accessories, historic photos, and trophies in addition to its main sales mission.
- T-Rex Natural History Museum in Ranchester offers early history of the area.

The region has an unusually fine collection of outdoor public art. Sheridan has about 50 installations, which may be the highest concentration of downtown public sculpture art in the nation. The idea of a former mayor in 1999, it was enacted in July 2000 as Resolution 24-00 to establish an "Art in Public Places" program. Fachon Wilson assumed responsibility for implementing the project, solicited the art, organized a competition, and turned the idea into a reality. Initially, the artwork followed a western theme but over time has branched into a wide range of forms, including a rhino, turtle, and a penguin, providing tourists with an unexpected blend of art. Buffalo, too, has a large number of western outdoor sculptures by distinguished, mostly local artists.

About half of Sheridan's sculptures have been purchased by local residents and were donated for permanent display. About half, in the form of outdoor gallery, are loaned by artists who are paid \$500 for each piece and are for sale at prices ranging from a few thousand dollars to \$38,000. Each June artists are invited to install their work and meet with other artists and the community.

The Bradford Brinton Museum & Memorial, located on a "Gentleman's" working cattle ranch, has, since 1961, been home to one of the West's finest collections of western art. The collection, which cannot be loaned out, includes Remingtons, Russells, and Boreins. The museum also displays temporary collections of local and other artists and conducts lecture series for the public. It also organizes art shows, which have sold as much as \$400,000 worth of art. Current plans are to expand the museum with the addition of a new building, sculpture gardens and nature trails. The museum also plans to add new collections of Native American art that focuses on the Crow and Northern Cheyenne. The museum, which is promoted in national magazines on western art, attracts up to 16,000 visitors a year

III. Foundations for Growth

“The state needs to fund infrastructure that keeps and attracts not industry but people, and not people who want to preserve wealth and live a fantasy rancher life, but creative people who want to see their dreams grow. Wealth is a natural offshoot of ideas.”

Pushed Off the Mountain, Sold Down the River, Samuel Western, 2002

In his insightful book, Sam Western was referring mainly to an infrastructure that supports universities and research. His argument applies even more to the artists, designers, architects, and other creative people in the industries covered in this report, the artists, designers, architects, etc. who are highly mobile and attracted to a place, not just a job. The key to economic development in the 21st century is people, not branch plants.

Dynamic creative economies are built on a solid base of assets that showcase their arts and products, grow markets, build their reputations, and support further growth. These building blocks include (1) first and foremost, the educational programs that produce new talent and enhance existing talent; (2) the associations that provide a social infrastructure for networking, learning, and sharing; (3) the scheduled events and performance series that showcase elements of the creative economy and attract audiences; (4) the places and spaces that house, display, and sell the arts, entertainment, and culture; (5) the resources and services available to the creative enterprises and workers; and (6) the physical environment. s

A. Learning by Doing: The educational infrastructure

One of the most important foundations of the creative economy is the educational system, which generates the work force, entrepreneurs, and consumers. This system fills in the missing skills; and provides support services. Sheridan and Johnson Counties can offer numerous learning opportunities in the arts, from exposure in the earliest years of public school, through the high school, in the college, and in a variety of private programs and teachers (Table 10). For example, a number of local artists supplement their income by offering private lessons, apprenticeships, or summer programs. David Osmundsen at Arrowhead Forge in Buffalo, for example, runs week-long classes in metal arts, and SAGE runs a summer art camp for children. Other artists and designers offer short courses in topics from quilting to digital animation to generate new interest in endeavors and introduce new topics.

Table 10: Examples of places for learning creative skills

- Sheridan College
- Sheridan High School
- Bauen Camp (summer)
- Tandem Productions
- Private lessons include:
 - Carrington Music House
 - Studio 48
 - Shall We Dance
 - SAGE
 - Arrowhead Forge
 - Potters Depot
 - Young Writers Camp
- Ucross Foundation
- Jentel Artists Residency

The region's artists and producers acquire their skills or learn their craft in less conventional ways than most others in skilled and professional lines of work. Since so many are entrepreneurial and not employed, their successes are based more on what and where they have exhibited, published, or performed; with whom they have studied; and whom they know rather than on their academic credentials. Even new hires are based as much on their portfolios, examples of their talents, or auditions than on academics—with the exception of those who intend to teach and need academic credentials. Of the artists responding to the survey:

- 30 percent acquired their skills in postsecondary schools, with more than half of those in community college;
- one in ten attended a craft school or had a mentor; and
- nearly half say they are mainly self taught.

1. Sheridan College

The most comprehensive source of skills for the creative economy, and the only one that offer credits that can be applied to higher education degree programs, is Sheridan College. The college, under the leadership of its President, has taken major steps to meet the needs of, and further the growth of, the creative economy. The college has expanded its arts program, established a dedicated Fine Arts Wing, increased the visibility of art with a number of galleries in the college (Martinsen Gallery, Fine Arts Hallway, Fine Arts Wing Gallery, and Student Services Gallery) and has placed sculptures on its grounds. The college also has plans for a “New West Center for the Creative Economy.”

The college offers an Associate of Arts Degree and Associate of Fine Arts Degree specializing in the visual arts and ceramic arts and performing arts. Courses in the program, open to other students, include photography, digital arts, Photoshop, and printmaking as well as art and sculpture. In the Computer Applications curriculum, students can learn desktop publishing and multimedia presentations; in the English curriculum, creative writing and poetry; and in the Horticulture curriculum that includes landscape design and ornamentals.

The college also offers a relatively new one-year Certificate of Completion in the Culinary Arts, which increasingly emphasizes creative preparation and presentation. It's the first accredited culinary arts program in Wyoming and includes an internship. The college program operates a restaurant near the campus and about 15 culinary artists were featured at the Big West Arts Festival last year.

The college's major weakness, which is currently being addressed, is in teaching and supporting the entrepreneurial skills that are so badly needed by the creative economy.

2. Public Schools

The public schools are especially important because of their strong influence on the creative spirit, their ability to direct students onto creative career paths, and to introduce new techniques. Both county school systems continue to place a high emphasis on the arts, in contrast to the many parts of the nation that are reducing their arts programs to focus on teaching to tested competencies. The artists appreciate the contributions of the public schools and in the survey named them one of only two regional resources that the majority found "well developed" enough to suit them. Sheridan has 29 art, music, or theater teachers in the K-12 schools and Johnson County has four (Table 11).

The emphasis on and strong teaching in the arts is rewarded by student outcomes. In 2008, for example, Buffalo High School won 69 ribbons in the statewide art show that featured more than 4,000 works of art, more than any other 3A high school.⁴ Four students were selected for Congressional Art Awards. And at least a dozen 2008 Buffalo graduates have announced plans for career paths in some aspect of the creative economy.

⁴ *Buffalo Bulletin*, May 15, 2008, Section C-1.

Table 11: Art and Music Teachers in the Schools

Teachers	Sheridan	Johnson	Total
Elementary	11	1	12
Middle & high schools	18	3	21
Colleges	4	0	4
Private schools	2	1	3

3. Retreats and camps

One of Sheridan's strengths is the extraordinary number of local places with national reputations known for their artistic or cultural environments. Ucross and Jentel, which are both members of the national Alliance of Artists Communities, and the Bauen Camp attract the artistically talented and inclined, not only from Wyoming but also from across the country and around the globe.

- **The Ucross Foundation** is a 22,000 acre working ranch with 12,040 acres on a conservancy easement that offers an residency program that hosts 65 artists and writers annually, four of each at any given time. Facilities include individual living quarters, separate studios, and a dining and living area in the historic Ucross School House. Applications include a project description, sample of work, and three letters of recommendation. This year Ucross will host its first composer-in-residence and pianist, Philip Aaberg, from Chester, Montana. About 25 miles east of the Big Horn range in a dramatic climate, the ranch has extraordinary beauty. Its goals are to provide uninterrupted time and space to nurture the creative spirit for selected artists and writers; offer meeting facilities for community and regional consensus-building; and become a model of land stewardship integrated with ranching in northeast Wyoming. Ucross provides art exhibition and performance space plus meeting rooms in the Big Red Barn, which was built in 1880.
- **Jentel** is a relatively new artists residency program located on a 440-acre ranch in the Lower Piney Valley established by Neltje as a family foundation in 2001. Under the directorship of Mary Jane Edwards, Jentel offers one-month residencies to six artists, two literary and four visual, 11 months of the year. Acceptance is based on a review of the artists' submitted work, and residents have no commitment to "produce" a work of art; they're there to develop their skills. Lacking exhibit space to share residents' work with the community, the artists instead come to the community with monthly public presentations and discussions called

“Jentel Presents” held in Sheridan. Some residents’ work also has been installed at Sheridan College. One of the long-term benefits of the residencies are continuing communications among residents and networking that goes on long after the sessions end.

- **The Bauen Camp** is an art camp that operates three sessions over the summer for 30 teenage youth each who are drawn from across Wyoming as well as from Chicago, Minneapolis-St. Paul, Denver, and New York. Founded in 2000 by Jessica Holt, the camp uses the arts to develop leadership and creative skills—music, writing, environmental education, and visual arts. It brings accomplished artists, writers, and musicians to help develop the artistic talents of the campers. It raises scholarships to enable low-income youth to attend (61 from Wyoming to date) and strives for a balance of one-third white, one third African American and one third from other races. The camp expects to produce measureable results among disadvantaged youth (recently evaluated by the Center for the Arts at Rutgers University) by building social networks of exceptional young artists and making them aware of the power of the arts for social change. To date, the camp has served 314 students from 7 countries, and employed 83 adults in staff positions, and put on public events attracting over 5,000 participants.

B. The Social Life of the Cluster: Cooperation and collaboration

Networking is an essential part of successful clusters, even more so in creative enterprise clusters because of the dominance of independent and small businesses. But in more sparsely populated areas networking is not as easy as it is in places like Manhattan, where networking is a daily occurrence that takes place in coffee shops, gallery openings and bistros. In this region, networking tends to be more intentional, at planned events or scheduled meetings. Distances, however, are less a barrier than they may seem in uncongested regions; it takes as much time to get from the Upper West Side of Manhattan to the Bowery as from Sheridan to Buffalo.

The creative economy is well organized both formally and informally. The leading organization representing visual artists in the region is the Sheridan Artists Guild Etc, or SAGE. It has 120 dues-paying members, a two-thirds time director, and provides services and classes as well as organizing forums and exhibits. For example, it holds an Art Quest, where a ticket of \$100 entitles the participant to a piece of art worth at least \$100. SAGE also serves as an umbrella organization for many groups that organize around specific art forms or functions, such as the

Creative Fiber Guild, Northern Lights Glass Artists, Wood Carvers of the Big Horn, Sketch Addicts, and Art Station Cooperative.

Johnson County’s Arts and Humanities Council offers memberships at nominal costs to artists and supporters but it does not provide the range of services to artists that SAGE does. It focuses most of its own efforts on community theater—writing and staging melodramas using local actors. In Buffalo, the organization of its creative sectors tends to be more informal, although some of the artists are members of associations headquartered in Sheridan. Deerfield, a local coffee house, gallery, and stage, serves as one convenient meeting place and hosts a number of regular events. In April, the Deerfield Gallery and Coffeehouse sponsored a very successful art competition (as part of National Recycling Month) called “Junky to Funky” that required that artists use, and explain the meaning of, recycled materials—materials originally manufactured and discarded, or unrecyclable and destined for landfill.

Table 12: Associations, Councils, and Guilds that represent and/or serve Artists and/or Creative Enterprises

Name	Members	Focus
Sheridan Artists Guild, Et al (SAGE)	120	Artists
Sheridan Arts Council	7 (Board)	Performers
Sketch Addicts	6	Portrait artists
Creative Fiber Guild	100	Fiber artists
Wyoming Watercolor Society	78	Watercolorists
No. Lights Glass Artists Guild	48	Glass artists
Woodcarvers Guild	18	Wood artists
Art Station Cooperative-Story	17	Artists (juried)
Public Art Commission	--	Board
Civic Theatre Guild		Theatre
Johnson County Arts & Humanities Council	40	Arts
Center for a Vital Community	--	Non-profits & foundations
Downtown Sheridan Association	133	Downtown Businesses
Chamber of Commerce	580	All businesses

Despite the large number of organizations, **networking ranked high on the list of artists’ expressed needs**. This may reflect the exclusion of certain types of artists from the major associations, and/or a desire for more opportunities to network

outside of the immediate region. For example, musicians, writers, photographers, and designers lack any comparable organizations to the more traditional visual artists. These other artists find networking more challenging and would like to have a more inclusive arts community with an organization open to other forms of artists.

The major needs of the design and creative services sub-cluster were labor and face time with clients. The young and highly mobile talent best suited for their web and graphic design jobs prefer cities where there are more peers and job opportunities to Sheridan. And with the media and design sectors very dependent on face time with clients and on connections, distance and lack of easy air travel poses a barrier.

C. Spaces and Places: Experiencing the arts

The creative economy must be broadly experienced as a built environment and artistic community to reach its potential. Products and experience are inextricably intertwined and must reach and appeal to diverse customers, patrons, and audiences. Therefore the environment matters. Both quality and scale of that experience are linked to the aesthetics and dynamics of the space. The places that are available to observe and participate in the visual and performance arts are part of the infrastructure of the creative economy. The two counties have a great deal to offer already but still have some limitations.

The region has a number of places to stage plays, musicals, concerts, or variety shows. The WYO attracts national recording stars such as Leon Russell, Garth Brooks, Seldom Scene, Slide Hampton, and Kathy Matea. The Civic Theatre Guild, started in the 1950s and directed and cast from talent in the community, puts on 3 to 5 plays or musicals a year at the Carriage House Theatre.

Performance venues

The region has a large number of places for staging performances (Table 13), but none really has all that is necessary for major productions that can attract large audiences. The WYO Theatre is a historically preserved art deco building that brings well-known entertainers to the region but is limited in what it can present by insufficient wing space for major productions and lack of full orchestra space. Both of these are currently being addressed by an architectural firm.

Most have restrictions due to school schedules, space availability for orchestra and/or complex sets, multiplicity of purpose, or accessibility. Performance space was one of only two resources that the majority of survey respondents

indicated were “well developed” enough. The region also has a small number of large outdoor venues for large events like rodeos or polo matches.

Table 13: Performance Venues with permanent seating

Venue	Seating capacity	Type	Place
WYO Theatre	483	Stage	Downtown Sheridan
Sue Henry Auditorium	435	Stage	Sheridan H.S.
Early Auditorium	750	Stage	Sheridan Jr. H.S.
Auditorium	450	Stage	Buffalo H.S.
Carnegie House Theatre	88	Stage	Sheridan
Bruce Hoffman Golden Dome	2,700	Stadium	Sheridan College
CTEL Auditorium	263	IT capacity	Sheridan College
First Presbyterian Church	300	Music venue	Sheridan
St. Peters Episcopal Church	325	Music venue	Sheridan
Big Red Barn	100	Platform	Ucross

Outdoor venues

Sheridan County Fairgrounds	5,181	Arena	Sheridan
Big Horn Equestrian Center		Polo fields	Big Horn
Whitney Commons Amphitheater	75	Performance	Sheridan
Kenbrick Park Bandshell		Performance	Sheridan

There are also a number of small performance venues that are not included in any national data but attract enthusiastic audiences. These include, for example, Deerfield, the Buffalo Library, American Legion Hall, and Senior Center, and various bars and restaurants. Musicians jam at the Occidental Hotel in Buffalo on Thursday nights. The World of Music program in Buffalo has made it possible for the community to experience a wide variety of music from around the globe including Bulgaria, Romania, Indonesia, Thailand, and various South American countries.

Shared and cooperative workspace

There are a small number of shared or cooperative workplaces operated by or for artists, and others are being planned. Shared space makes workspace more

affordable and also provides opportunities for sharing and learning from one another. SAGE is attempting to find space in Sheridan in which artists can work, exhibit, teach, and network.

- The *Art Station* at Story is a cooperative staffed by the 17 artists that market their own art.
- The *Pottery Depot* in Buffalo offers studio space to students and others in the community,
- *Sketch Addicts* have studios plus some shared space for classes or other events on the second floor on Main Street above the WYO Theatre in Sheridan.

Survey respondents also indicated a lack of sufficient studio space for artists.

Three-quarters of respondents said studio space was either “quite” or “somewhat” undeveloped. No one said studio space was “well developed,” and only 26 percent said that it was “somewhat” developed. Three of four artists also said the availability of workspace was reasonable only because they worked at home. Many would prefer a studio space outside their homes if they could afford it.

Performance Spaces

Attitudes about the adequacy of performance spaces were mixed. About 48 percent said that performance space was either “well” or “somewhat well” developed. On the other hand, 52 percent said they were “quite” or “somewhat” underdeveloped.

The **WYO Theater**, which first opened in 1923 as a vaudeville theatre, is a major asset for downtown Sheridan. Renovated in its current art deco form in the 1980s, the WYO, under Nick Johnson’s leadership, has succeeded in attracting well-known artists, including Garth Brooks, Maria Muldaur, Riders in the Sky, Boys of the Lough and Kathy Mattea, and drawing large audiences to their performances. Yet the theatre is limited in its shows because it lacks the stage wing space and orchestral pit for larger concerts and musicals. Forward Sheridan’s plan pointed out that no current space is able to accommodate a full symphony orchestra or touring Broadway musical. Another specific problem mentioned was the lack of practice and performance space for Sheridan College students; the WYO has generally not been available for them to use for this purpose.

Museums & Historic Centers

The region, given its size, has an unusually large number of cultural and historic attractions, some of which are listed below.

- Jim Gatchell Museum
- Occidental Hotel
- King's Saddlery
- Fort Phil Kearney
- Outlaw Cave
- Sheridan Inn (in renovation)
- T-Rex Natural History Museum
- Bozeman Trail Museum
- Sheridan County Museum
- Trail End State Historical Site
- Little Big Horn Battlefield
- Sheridan County Museum



Together, these attractions establish a firm foundation for attracting tourists and promoting local art.

Dude ranches

A number of the largest dude ranches provide guests with entertainment, photography, and opportunities to purchase western art. These ranches, which attract a stream of visitors interested in western culture, can be a steady source of income for musicians and photographers and an opportunity for any local artists specializing in the western genre. At Canyon Ranch, for example, co-owner Sandy Wallop is also a photographer, and last year the Ranch held an arts festival. Dave Munsick and a partner photographer produce videos for the ranches, and Leon Shatz produces videos.

Table 14: Examples of regional dude ranches

Sheridan County	Johnson County
<ul style="list-style-type: none"> • Eatons • Canyon Ranch Guest Ranch • Double Rafter Ranch • Spear-O-Wigwam Ranch • Powder River Experience 	<ul style="list-style-type: none"> • HF Bar Ranch • Klondike Ranch • Paradise Guest Ranch • T Cross Ranch • Ratter Y • The Ranch at Ucross • Willow Creek Ranch

D. Events and Affairs: The Big Shows

The region has a plethora of events to either explicitly showcase creative products or that highlight various aspects of the creative economy. According to Forward Sheridan's Strategic Plan, that county alone has "over 125 annual opportunities for access to the visual arts...throughout the year." Some of the most prominent are shown in Table 15. Art shows and music festivals are the most direct opportunities, but musicians and craftspeople also can take advantage of the market opportunities to perform or set up booths, particularly for western and Native American music and art, at the rodeos, cultural celebrations, and county fairs that attract thousands of visitors.

Table 15: Examples of events that include the arts

Event	Date	Artists	Attendance	Place
Sheridan Open Studio Tours	Nov			Sheridan
Dayton Art Loop	June	10-12	500	Dayton
Celebrate the Arts	June	33	1,000	Sheridan
Big West Arts Festival	Aug	115	5,000	College
Wyoming Watercolor Show	June	65		Sheridan
Rocky Mountain Leather show	May		1,000	Sheridan
Tandem Productions	--	--		Sheridan
Big Horn Mountain Festival	July		2,500	Buffalo
Buffalo Bill Days Wild West	June	--	2,500	Sheridan
Don King Days	Sept		3,500	Sheridan
Concerts in Park	Summer		2,000	Sheridan
WYO Rodeo	July	--	10-15,000	Sheridan
Farmers' Market	Jul-Sept	--	500	Downtown
Christmas Stroll	Nov		5,000	Downtown
WYO Theatre series	--	--	13,500	Sheridan
History Day	June			Buffalo
Johnson County Fair & Rodeo	Aug		1,500	Buffalo

Tandem Productions, started by Richard and Tami Davis in 1995, promotes children's theatre and performing arts and has an active summer theatre program for 8 to 15 year olds. Over 350 young people have participated in their productions. In 1998, they started a summer theatre camp in cooperation with the YMCA, and the next year, the Sheridan County Children's Chorale.

D. Resources and services

An important part of the support structure for the creative economy is sources of funding, technical assistance, and promotion. Because the economy is dominated by small lifestyle or lone eagle businesses that choose to remain independent and small and by small businesses that are small because of the structure of their industry, they tend to be overlooked by conventional sources of capital and assistance. Most state programs target mid-sized companies or gazelles that are looking for fast growth.

Capital and Philanthropy

The artists ranked funding only sixth among their needs (30 percent), possibly because a large number do not depend on their income. Of those that do, it ranked fourth among needs. Many of the visual, literary, and performing artists depend on either public sector or foundation support. Fortunately, the region is home to 68 foundations, and about a quarter support the creative economy. The Whitney Foundation is the most prominent in the arts. Other primary sources for artists include the state arts council, National Endowment for the Arts, and National Humanities Center.

The other parts of the creative economy rely on more conventional resources—banks, small business programs and centers, and state business assistance programs. But most have little expertise in these sectors of the economy and paid insufficient attention to businesses that need help.

Technical Assistance

“Musical talent is only one tenth of what it takes to make it,” according to a local musician. “It takes business skills to find markets and sources of income.” Local artists generally feel that nearly all the resources for artists are not well developed. Two of their biggest needs are marketing assistance and access to markets, but a significant number also choose business and financial management assistance and computer assistance. They need, in particular,

Sheridan College's Annual Big West Arts Festival: For two days in August the Sheridan College campus is converted to an art, music, and food lover's paradise, displaying works of over 100 juried artists from all over the nation and showcasing the skills of selected culinary artists. In its first year, *Art Fair Source Book* billed it as one of the top 200 art fairs in the nation. In 2007, the festival added a welding rodeo, a competition among students to produce welded art from scrap metal. Last year the event attracted more than 5,000 people and is becoming a signature event for the area, complimenting existing diverse events and adding to the region's presence as a

entrepreneurial advice and assistance. One experienced leathercrafter said “you learn as you go, but you acquire the business skills way too late.”

In other states, cooperative extension offices, or the manufacturing extension partnerships, or small business development centers are sources of support for small businesses, but in most places the creative enterprises either are unaware of their services or their circumstances and needs are not well understood. Most state programs must justify their programs based on businesses started, job growth, or revenue growth, all difficult measures to capture in the creative economy.

Travel and Tourism

The creative economy of Sheridan and Johnson Counties has its own identity that sets it apart from creative economies in other regions and gives it a unique brand. Most of the responsibility for promoting the region's assets rests with the Sheridan and Buffalo Travel and Tourism and the Chambers of Commerce. Those entities, in the case of Sheridan supported by the Sheridan Press, produce materials that are available in various locations and airports, and it supports the web sites. Wyoming's state literature, unfortunately, supplies relatively little information about the region.

IV. The Physical Environment

In order to reach its full potential, the creative economy must be broadly experienced and enjoyed as a physical environment. The products and services of the creative economy and the experiences of customers, patrons, and audiences are inextricably intertwined with the locale's architecture, city design, and its regional landscape. These involve the aesthetic nature of a host of places and settings, including where art is exhibited and produced; where performances take place; where books are sold; where people dine in restaurants, pubs, and coffee shops; where they are lodged; and where and how they travel by car, public transportation, or on foot. This environment needs to be not only an attractive place to see and purchase creative work and services, but it should also be a place to simply enjoy a quiet stroll in a park.

The streetscape of a city, and particularly its downtown and the landscape of a region all contribute to the experience of the people who are involved in the creative economy—from those who purchase the products and services, to not the least, those who produce them. In essence, to be fully successful, this physical environment must be especially attractive as a place to live and work, as well as to visit.

Fortunately, both Sheridan and Buffalo, and the broader region in which they are situated, provide a basic, and one could argue, an ideal setting, as a creative economy environment. They feature a spectacular natural environment with important cultural and historic sites that include the Big Horn Mountains and downtowns that are not only easily walkable, but are filled with representative examples of period architectural styles from the late 1800s to the early 1900s, as well as some later periods. This includes a range from Buffalo's neo-classic Jim Gatchell Museum and Sheridan's dramatic Art Deco-style WYO Theater.

In some places, building owners have been involved in superb architectural restorations. An excellent example is Buffalo's Occidental Hotel with its original woodwork and embossed metal ceilings, and where, as the management explains, such details as bullet holes in the hotel's bars have been retained. The hotel also boasts visits by famous and infamous historic figures from President Theodore Roosevelt to Butch Cassidy and the Sundance Kid.

Sheridan and Buffalo's places on the National Register of Historic Places are the result of a well-preserved eclectic collection of buildings. These include brick and rusticated stone buildings with neo-classic, Victorian and neo-Romanesque cornices, window jambs, and entryways. In Sheridan there are Federal-style banks, and the wood-clapboarded Sheridan Inn with its Gambrel roof, unique

rows of dormers, and broad porch that is touted as one of Buffalo Bill Cody's favorite haunts.

Neither of their downtown streetscapes has suffered the aesthetic consequences of strip malls and big box stores. Both cities offer a unique, and an increasingly rare kind of Main Street experience that are found in few other cities, and one that is increasingly sought by visitors and tourists. While there are vacancy problems in many of the upper stories, stores, art galleries, hotels, civic buildings, offices, and residences, are in generally well-maintained buildings, and the mix of these activities add a vibrant and diverse quality to their downtowns.

Sheridan's collection of historic period buildings is especially extensive. It includes such impressive and more grandiose masonry buildings like the Romanesque-style Cady Opera House building built in 1893 and the Greek Revival-style old County Court House built in 1905, to more modest, but no less historic ones, like the building that currently houses the Hospital Pharmacy, that was built in 1883 and the Mint Bar, built in 1907.

The Hospital Pharmacy building was originally Sheridan's first general store and is the oldest building in the city's historic district. It is also the only false front building, a typical feature of early western towns that remains on Main Street. The building now has a mural on its false front that depicts the downtown's older street life. The Mint Bar was officially closed during Prohibition, but a speakeasy operated in its back room until the end of Prohibition. The building was renovated in its current wood rustic style in late 1940s.

While the original architecture of many buildings have remained intact, on others there are remnants of some original features, like the arched door openings that horse-drawn fire wagons went through that were part of Sheridan's first Town Hall and Fire Station. And some of Sheridan's existing Main Street buildings were built on the sites of former buildings with colorful historic origins, like the Perkins Building, (sometimes called the Crescent Hotel Building) that was built in 1908 on the site of the "Bucket of Blood" Saloon, part of Sheridan's frontier red light district, was built in 1892.

Many of the buildings that have replaced earlier ones have their own distinctive architectural qualities like the early 1940s WYO Theater that replaced the 1923 Lotus Theater. The exterior and interior of the WYO is an excellent example of the Art Deco- style that flourished in the 1930s and 40s. Sheridan also has a number of substantial period architecture buildings that once housed dry goods stores and are now the setting for different enterprises. These include the Stevens Fryberger or "New York Store" Building that was opened in 1908, and now has an exquisitely designed second floor residence; the current Dan's Western Wear Building with its distinctive cast iron front that was built in 1907 and

occupied by Peret & Luce dry goods business in 1910; the current J. C. Penney store building, sometimes called the Kendrick Building, was originally the site of a livery barn that opened in 1907 and became the location of one of the country's first J.C. Penney stores in 1927.

A. Business and Community Needs

Yet in spite of the many architectural, visual, and activity assets of Sheridan's downtown, as the surveys and interviews show, there are still many challenges to overcome and improvements that could be made. A consistent theme of these responses was the desire to retain the qualities that already exist in the downtown, while improving upon them in the future.

Visual appearance

Many respondents believe that Sheridan's downtown is attractive as is, representing the Western tradition as well as any city. Yet there is also a diversity of opinions about its visual appearance; some point to the hodge-podge of styles and materials while others are concerned about city officials dictating too many design controls. Calling for greater design consistency, the Forward Sheridan Strategic Plan observed, "Many buildings in the downtown would benefit from façade renovation to preserve the structure and to better integrate with the historic architectural styles of the area." In a Buffalo survey, the "Restoration of Historic Building Facades" received the most responses, and "More Parking" and "Special Graphics and Signs" and "Improved Streetscape" also received a high number of responses.

Both Mark Reid, Sheridan County Planner, and Robert Briggs, Sheridan's Planning and Development Director, noted that there is a need to revise the downtown zoning plan and to create better architectural design guidelines. Having said this, they also observed that Sheridan's building owners and store operators were not likely to favor strict controls over signs, architectural styles, and materials. More generally, they noted that there tends to be a cultural attitude in Wyoming that's antagonistic to strict architectural controls. Yet when businesses were surveyed about changes that would best improve the streetscape (Table 19), "design review of buildings and renovations" received the most votes indicating a willingness to exert some type of control over appearance.

Hospitality

Chief among the concerns of the survey respondents was the lack of restaurants and other activities to attract people to the downtown in the evenings. In the survey, 62 percent said Sheridan's restaurants were either "quite undeveloped"

or “somewhat undeveloped.” Only seven percent said they were “well developed.” More restaurants would attract people during the day and in the evenings.

Transportation and Parking

Transportation to get to and from Sheridan was seen as an important problem. Over 70 percent said it was underdeveloped, and less than 4 percent said it was “quite developed.” The recent surge in gasoline prices will likely create an even more critical problem, and the limited number of commercial flights into Sheridan is a major inconvenience, if not a serious problem

Table 16.

Table 16: Types of investments that would make most difference to Sheridan businesses

Investment	Rank Score*
More restaurants	68
Better transportation to and from	48
More convention/conference space	48
More downtown events	42
Historic preservation	41
More space for your business	37
More public gathering space	27
Better transportation within Sheridan	27
Better signage	21
Different traffic patterns	15
Better lighting	12

* Awarded 3 points for number one rank, 2 points for number two rank, and 1 point for number three rank.

Table 17: Types of marketing investments that would make most difference to Sheridan business

Investment	Rank Score*
Cooperative marketing, advertising, promotions	120
Branding of area	91
More outreach to tourists	79
Maps of downtown	70

* Awarded 3 points for number one rank, 2 points for number two rank, and 1 point for number three rank.

Table 18: Factors that Limit success in Sheridan

Factor	Rank Score*
Labor force	124
Seasonality of business	48
Lack of foot traffic	46
Supplier issues	31
Competition from Billings	28
Sprawl	22

*

Awarded 3 points for number one rank, 2 points for number two rank, and 1 point for number three rank.

Table 19: Changes that would most improve the Sheridan's streetscape*

Factor	Rank Score*
Design review of buildings and renovations	102
Landscaping	77
Zoning	66
Signage	49
Lighting	32
Sprawl	22

Awarded 3 points for number one rank, 2 points for number two rank, and 1 point for number three rank.

V. Recommendations

The two counties have far more on which to build than the vast majority of micropolitan regions in America—a rich and fascinating history, architecture, arts, tradition, physical amenities, and a spirit of adventure and openness. Yet it has not yet realized the full economic potential of these assets because they've been viewed primarily through the lens of tourism, not a competitive, export industry.

Table 20 contains some of the strengths and constraints discovered in the course of our research, which we attempt to address with the following recommended actions.

Table 20: Strengths and Weaknesses in Creative Economy

Strengths	Constraints
Natural beauty	Insufficient public transportation
Deep artistic talent pool	Paucity of Native American art
Renowned leather artistry	Lack of exhibit space
Established art colonies	Very weak signage
Foundations/wealth	Weak technology talent pool
Western traditions	Resistance to change and new ideas
Historically preserved Main Streets	Rising property costs
Abundant youth arts programs	Hierarchy among artists
Associational infrastructure	Lack of college non-transfer programs
Path to Yellowstone, Black Hills, Billings	Low value placed on art in community
Large number of events	Limited shopping hours
Dude ranches as potential markets	Seasonality of economy

Goal One. Take systemic actions that strengthen the creative economy

The following recommendations are fundamental to the growth and sustainability of a creative economy as a whole and its contributions to and integration into other aspects of social and economic life.

A. Form a Creative Economy Council

Even though the counties have a number of effective organizations, the need for a Creative Economy Council cuts across the full breadth of the creative economy and is not currently addressed by any single organization. The Council could be formed by representatives of existing associations, supplemented by representatives of sectors not already organized, particularly leaders from the

business and economic development communities. The function of the Council would be to oversee the implementation of the plan, see that the creative economy is applied effectively to business recruitment and tourism efforts, support efforts to address the cluster's needs, and help provide guidance for f

- Establish a Regional Creative Economy Council, with its nucleus drawn from the project steering committee but adds representatives from other communities and sectors, appoint co-chairs, establish its organizing principles and responsibilities, and create working committees on functions with highest priority.
- Apply for startup funds from Wyoming Arts Council, USDA, private foundations, etc.

Berkshire Creative is a newly formed Creative Economy Council for the Berkshires region of Massachusetts, formed in response to a Strategic Creative Economy Plan. The Council has about 25 members from all segments of the arts community, as well as people from the business community. Working committees have formed around design, marketing, an arts database, and entrepreneurial training. The Council hosts a bi-monthly networking activity for artists called "Spark." Funding from the state Cultural Council has allowed the hiring of a new Director and Assistant.

B. Integrate creative economy into regional development plans and programs

Since the arts, culture, and design are essential to the competitiveness of many other industries and are important factors in the quality of community life, they ought to be integrated into all aspects of regional planning and development—industry, education, technology, and tourism.

- Include representatives from the arts and creative economy on boards and key committees throughout the two counties and representatives of other sectors active in the creative cluster's activities.
- Ask partners to identify strategies adopted from the Arts & Culture recommendations in their implementation plans and budgets.
- Publish an annual progress reports on adopted strategies.

C. Expand and make more inclusive networking opportunities and events

Existing networks meet the needs of some niches within the creative economy but many—e.g., musicians, writers, photographers—are not well represented in existing networks. Among the suggestions made in the focus groups was a music/theater cooperative to provide them with the benefits that the art organizations and cooperatives bestow on visual artists. But equally important, research shows that weak links are more effective at generating new ideas and

innovations than strong links, because it exposes people to different experiences and cultures. Interdisciplinary, inter-regional and international connections can expand both creativity and markets.

- Establish formal linkages to selected regions in the U.S. and regional relationships overseas and facilitate (and incentivize) exchanges of art and among artists.
- Organize regularly scheduled events such as Cocktails and Culture or Arts and Appetizers with unusual themes at different venues to attract artists and those interested in the arts.
- Establish connections (network) between the designers in the region and the larger, more established design sector in Billings for the exchange of knowledge and opportunities for collaboration.

D. Strengthen relationships to other cultures and integrate their art

While the region represents the cowboy and Western art very well, the art of the Native American and Basque populations are underrepresented. If better integrated into the art scene, they would add to the diversity of art while still retaining the region's cultural heritage. Angie's "Mostly Basque" Glass in Buffalo and the Custer Battlefield Trading Post at the Crow Agency just across the Montana line and the international musicians that David Romtvedt brings to perform in Buffalo are examples of art that adds other dimensions and greater breadth to the current western art genre.

The **Laboratory of Arts and Ideas** at Belmar, Colorado offers regular art exhibitions, music, classes, and discussions, the latter often in quirky formats to bring people together. For example, their Mixed Taste Series pairs lectures on seemingly unrelated topics like "Prairie Dogs and Gertrude Stein," "Earth Art and Goat Cheese," or Swiss Typology and TV Theme Songs." <http://www.belmarlab.org>. he **Laboratory of Arts and Ideas** at Belmar, Colorado offers regular art exhibitions, music, classes, and discussions, the latter often in quirky formats to bring people together. For example, their Mixed Taste Series pairs lectures on seemingly unrelated topics like "Prairie Dogs and Gertrude Stein," "Earth Art and Goat Cheese," or Swiss Typology and TV Theme Songs." <http://www.belmarlab.org>.

- Establish a regional international cross-cultural arts and cultural event, drawing on international artists in residence at Ucross, Jentel, or Bauen and Sheridan's membership in the Trans-Atlantic Technology & Training Alliance as well as with nearby Native American tribes.

E. Encourage foundations to collaborate on funding and support for creative economy

The region is fortunate to have as many foundations as it does. Collectively, these foundations provide important support to artists and to arts organizations in the region. To make the foundations' contribution even greater, we recommend that the foundations develop a pool of funds for the Creative Economy. A pool would allow for larger grants, especially for projects and programs that could have strategic value to the overall strength of the Creative Economy. Funding support, for example, for several of the recommendations contained in this report, may be beyond the capacity of any individual foundation. But, if a pool were created, it may be possible to fund some of these projects and programs. Also, we believe that a pool targeted specifically to the Creative Economy, especially to some of the projects and programs in this report, would not preclude the foundations from continuing to provide support for the work of individual artists and local arts organizations.

- Establish an Arts Committee among foundations that support the arts and culture to review proposals and coordinate giving.

Goal Two. Further develop and preserve the physical environment for the arts and design

A. Improve signage, displays and mapping for downtowns and region

While Sheridan's streetscape retains a unique character, it could benefit from minimal controls and design guidelines to insure that it retains and improves upon these qualities in the future. These guidelines need not necessarily specify the exact style or size of signs; in fact, such uniformity would not be in character with the historic nature of downtown streets. The most critical goal would be to insure that signs do not cover or obliterate the original architectural features of the building on which they are located. Currently, Main Street's buildings have signs of various styles and sizes, but fortunately, with a few glaring exceptions, the basic original architectural form of the buildings have mostly been retained.

The exceptions include buildings whose entire facades, including their windows, have been completely covered with metal or plastic facings. Where possible, the owners of these building should be encouraged to remove the facings and restore the facades, including their window openings to their original character.

The addition of informational signs and maps would assist visitors and tourists in locating Sheridan's galleries, stores, and other area attractions and facilities. Signs should be designed, with particular attention to using attractive graphics,

and maps should include the city and its surrounding area, as well as a more detailed one of the downtown. The signs, strategically placed in the downtown and other parts of the city, could include such categories as “Restaurants,” “Art Galleries,” “Clothing Stores,” “Theaters,” “Hotels,” “Government Buildings,” “Annual Events,” etc. In addition, directional signs to major attractions would add to the appeal of visiting the area.

- Contract with a creative mapping firm to develop an artistic map of the downtowns in the region.
- Develop a branded sign and make sure that all major cultural, historic, and artistic sites are well signed to make it easy for visitors and tourists to find their way.

B. Support new diversified Art Centers in both Sheridan and Buffalo

The creative economies of both cities would benefit from an art center in each of their downtown areas. In Sheridan, SAGE has a potential site at 30 North Gould Street that, with some modifications, would be quite suitable. The former school building, built in 1915, has 7,600 square feet with a finished main floor and lower floor that, with modifications, could be made useable. Such spaces could include galleries for artists, sculptors, photographers, craftspeople, and others in the arts community to display and sell their works, classroom space, and possibly shared workspace or new business incubators. If acquired, this facility would provide a central and visible hub of artistic activity and inject a surge of new energy into the art community. In Buffalo, the arts district on North Loban Street may offer the best site. The Centers would become focal points for the arts community to exhibit their work, meet, and generally support each other.

- Support the efforts of SAGE to acquire property and resources for a Center that could serve both counties and of Johnson County to find space and resources appropriate to its needs.

C. Repair and preserve the architectural heritage

New and renovated buildings should be designed in ways that add interest and vitality to the visual continuity of the downtown streetscapes. Business owners should be encouraged to use their store windows to display art and merchandise in ways that encourage passersby to enter their stores by being able to easily view what goes on inside of them. A good example of a design approach to avoid is the Sheridan State Bank on South Main Street. Although it has an impressive architectural form, its façade provides a barrier rather than an opening to the street. Sheridan College's gallery space in the Tucker Building is a welcome addition to the downtown, but the College might consider removing

the large window sign so that the artwork can be more easily seen from the street.

- Authorize, at the community level, and establish design review boards to review plans for remodeling existing buildings, constructing new ones, and review sign designs.

D. Convert upper floor spaces to loft studios for artists and offer locational incentives for artists.

Sheridan and Buffalo's problem of vacant upper floors in the Main Street buildings and the lack of affordable living/work spaces for artists could be solved by encouraging the renovation of these spaces for artists' living/work spaces. This would have multiple benefits by assisting the artists, improving income for building owners, safeguarding the buildings from fire, and repairing the city's architectural heritage.

In some cases it may be possible to provide the artists with raw space and then have them build out the spaces themselves or to contract with builders to have it done for them. Building owners might also consider turning these upper floors into condominiums. They and /or private foundations might provide funds for artists to hire architects to assist space designs. Building owners might also consider discounting the sales prices or rents for these spaces since having them occupied by artists would add to the vitality and life of the downtown and improve the value of their buildings.

- Inventory upper space downtown to determine suitability for living or work space.
- Develop a set of incentives to attract new ownership.

E. Introduce new forms of public art that reinforce regional brand

The current use of street sculpture has added interest to Sheridan's downtown. But in order to reinforce the unique identity of the region and its historic and creative culture, it is suggested that a future street art competition might be based on a more consistent theme that would help in the branding of the city. One example might be a competition for the design of artistically conceived horse hitching posts. This could result in a great variety of design approaches in steel, cast iron, stone, concrete or other materials, for hitching posts that would be permanently installed along downtown sidewalks. Another example would be the use of benches, again, with a regional cultural theme.

- Establish a competition for public art that would complement the sculptures and reflect the region's western history and traditions and its future.

F. Improve parking in Sheridan

This issue is currently under consideration; a recent survey conducted by the Downtown Sheridan Association found that the vast majority believe a parking lot will be needed within five years and that parking on the street should be limited to two hours. Yet while most people arriving in downtown come by car, the optimum distance between parking needs and a person's destination isn't obvious. It can be as much a matter of aesthetic judgment as that of a precise distance calculation. The closer garages or parking lots are to Main Street, the more convenient they would obviously be. But if the consequence of doing this means the removal of stores and other existing buildings, this would detract from the aesthetic qualities of the streetscape. Planning judgments need to be sensitive to this issue when deciding on the amount of parking spaces that should be developed, their location, and the visual qualities of a garage or parking lot.

- Consider the aesthetic impacts of any plans to expand parking downtown.

G. Develop an “art district” on North Lobban Street in Buffalo

North Lobban Street already has the beginnings of an art district that could be expanded with the Pottery Depot and Arrowhead Forge anchoring the district and anticipated availability of other properties. Some local artists and community leaders have suggested the creation of dedicated housing for artists, an outdoor area for displaying art works, and encouraging and attracting additional artist studios and art galleries to move to the area.

- Develop long-range plan for art district including use of existing buildings and branding.

H. Offer incentives to attract more eating establishments to the region

Paucity of good restaurants was frequently mentioned in both counties. In Sheridan, it was number one among investments most likely to make a difference to the businesses. There is currently too little variety at the higher end. Given the importance assigned to restaurants and the potential economic impact, some type of incentives to attract new investments (by new or existing establishments) or attract culinary artists may be in order.

- Consider low cost loans or tax abatements for new investments and improvements.
- Encourage more musicians to perform downtown.
- Build on the culinary arts program at Sheridan College to establish additional restaurants, as they have in Montpelier, Vermont.

The 27 year-old **New England Culinary Institute** (NECI) in Montpelier, Vermont, provides paid intern training for their students at a number of facilities they own in the state. "Our restaurants' kitchens are our classrooms," NECI advertises to prospective students. In Montpelier, there's "La Brioche", a bakery and café, "The Main Street Grill" restaurant, and "The Chef's Table Event Center" that caters weddings, receptions, and parties. In Essex Junction students can intern at "Butler's" or at "The Tavern" restaurants, both at "The Inn at Essex."he 27 year-old **New England Culinary Institute** (NECI) in Montpelier, Vermont, provides paid intern training for their students at a number of facilities they own in the state. "Our restaurants' kitchens are our classrooms," NECI advertises to prospective students. In Montpelier, there's "La Brioche", a bakery and café, "The Main Street Grill" restaurant, and "The Chef's Table Event Center" that caters weddings, receptions, and parties. In Essex Junction students can intern at "Butler's" or at "The Tavern" restaurants, both at "The Inn at Essex."

Goal Three. Assist artists, artisans, and designers in marketing more effectively and in reaching a larger customer base.

A. Expand regional art in corporate spaces, e.g., hospitals, banks, other businesses.

Local businesses and institutions should be looked upon as markets for local and regional creative products. They often purchase art to display in public spaces and on the walls of offices. For example, a community hospital in Arkansas bought nearly \$350,000 of local art and displayed it on the walls of the hospital. Although there are examples of the display of local artwork in some local businesses (Arby's and the Holiday Inn both have local photographs on their

walls), Johnson County's companies and institutions should be approached by the arts community and encouraged to take part in a 'buy local artwork' program. The program should be coordinated by one local arts organization so that businesses and institutions deal with a single arts representative. Also, in some regions that have a significant second home market, realtors have been supportive of local artists and have encouraged second home owners to look to the local art market when furnishing their new homes.

- Meet with business owners to assess receptivity to increased use of regional art and develop plans that would create markets for local art, deepen the region's commitment to becoming a creative economy, and give the recipient businesses distinguishing features with market value.

B. Develop and promote regional web-based artists registry and e-commerce site.

The region's creative economy would benefit significantly from a higher-profile web presence. Arts-intensive communities throughout the U.S. are developing comprehensive artist registries and product listings. These serve both as a marketing tool and as a means of enhancing the visibility of the local arts community. The best of the arts and creative enterprise web sites typically are artistically designed, easy to access and use, and include some of the following components: profiles of artists by discipline (often juried) and information on how and where to purchase their work, listings of services and grants that are available to artists and arts organizations, employment opportunities in the arts and creative economy, a coordinated calendar of arts and cultural events and activities, a directory of education and training programs, businesses and other sponsors and supporters of the arts, and listings of networking opportunities. Combining the creative elements of the two counties into a regional registry, as the Toe River Arts Council has done for Mitchell and Yancey Counties in western North Carolina, would provide greater scale and diversity for the region's arts.

- Working with SAGE and the newly established Regional Creative Economy Council, establish a common e-commerce site for region's visual, performing, literary, and design artists and, through Sheridan College's new entrepreneurial program, help them learn to use the Internet effectively.

C. Develop and rent handsets programmed for interpretive audio tours.

This idea was borrowed from recommendations to develop the tourism sector in the Billings area. Tourists would be able to rent handheld audio sets with content matched to numbers on maps with interpretations and descriptions at various

sites of their history or meaning. It could also direct users to other nearby cultural, historical, or artistic sites as well as to galleries and shops or places to stop for snacks.

- Either independently or in cooperation with Billings, create podcasts of sites of interest that include information about the sites that are keyed to maps and can be accessed through headsets that would be rented from various sites in the region.

D. *Certify hospitality workers and shop owners as regional "Cultural Hosts."*

Sheridan College should develop a training program for employees in sectors that serve tourists and visitors to educate them about local history, cultural sites, and artists. These are the individuals who meet and greet visitors to the area – if they are well informed about the region's cultural assets, they can play an extremely important role in promoting them. On passing a test, they would be certified and paid a stipend as a reward for their service to the community. The businesses and institutions where these individuals work would be listed, and given an emblem for public display, as places where "Certified Cultural Hosts" are available.

- Establish a certification process and brand for cultural hosts.
- Develop the certification training and testing program at Sheridan College.

Falkirk Further Education & Training College in Scotland offers "Falkirk Inspired" training for hospitality workers. Typical courses are called "the Cultural Jungle" about how to understand cultural differences, "Discovering Hidden Delights" to inform about unusual local highlights, and "Magical Mystery History

Goal Four. Strengthen the growth of the creative economy by expanding the delivery of educational programs and services of Sheridan College

A. *Establish entrepreneurial education programs and support services tailored to creative businesses.*

The entrepreneurial nature of the creative economy suggests a need for educational and support services that address the business needs of "lifestyle" entrepreneurs; most state services, however, target growth-seeking entrepreneurs, or "gazelles." The operations of small arts-based businesses, including culinary arts, are different than more conventional businesses and aren't easily integrated into generic business programs. Sheridan College is

already part of a federally funded effort to develop a curriculum to teach e-commerce to artists, an important component of such a program. The content also ought to be delivered in compact modules to working artists as well. The final leg of this program could include incubator space for artists, in which young or new artists are given low rents and support for a finite period of time to develop their talents and markets. The incubator could also include space for specialty foods, in which culinary artists and growers could collectively access design and manufacturing assistance to develop unique new products and businesses.

- Follow existing plans to develop entrepreneurship program in the arts and expand into culinary arts program.
- Integrate e-commerce curricula into arts program and offer as non-credit course to regional artists.
- Solicit targeted support from the small business services of cooperative extension and the state's small business development center.
- Establish incubator space and services for new crafters and artists, possibly in downtown loft and, possibly also, in Sheridan or Buffalo, that provides common business equipment, joint purchasing and, as needed, shared capital equipment.

B. Establish a dedicated Sheridan College Arts Career Center

This Center, which could be located either on the main campus or in a new facility in Buffalo where there is an concentration of functional artists, would offer both credit certificate programs and courses in art forms that reinforce or extend western traditions and the natural environment, such as metal, wood, leather, and ceramics. It would deliver programs at times that meet the needs of non-traditional students, e.g., evening classes and accelerated curricula. Some courses could be taught by established artists at their studios, which already have the necessary equipment. To broaden exposure to different techniques, the Center could invite ceramic artists from the nearby Crow tribe where, according to the *New York Times* this year, "Indian pottery-making is so well established in the art department that schools from other parts of the state [Montana] now come to learn."⁵

The leather arts, which are part of the region's heritage but are embodied in an aging population of leather crafters, are particularly important if the craft is to survive. A program in this field, according to local artists, would be very helpful.

⁵ Kirk Johnson, " On the Reservation and Off, Schools See a Changing Tide," *New York Times*, May 25, 2008.

Although most leather crafters begin as apprentices, many lack the marketing, management, and business skills needed to become a successful enterprise. The Arts Career Center would complement the college transfer Associate of Arts programs with employment or self-employment-oriented occupational programs.

- Assess the regional demand for an expansion of non-credit programs.
- Add programs to meet the demand using local artists as resident instructors wherever possible but also considering artists in residence.
- Establish on a trial basis a summer residency program and draw from entire state and surrounding states.

C. Strengthen graphic, web design, digital photography, and other technology-based occupations in creative sectors.

Graphic design, web design, and other technology-based creative occupational programs ought to be strengthened by more advanced courses that are available to full-time students and to individuals wanting to upgrade their skills. Businesses expressed some dissatisfaction with the level of training available, that it was aimed at new entrants not skill upgrading.

- Add more advanced courses in technology-based design techniques.

D. Add a historic preservation minor to sustainable building or construction programs.

Historic preservation is an overlooked skill with a growing market demand. Teaching students how to preserve the historic integrity of existing structures could be a valued minor in either sustainable development or construction programs. The Sheridan Inn recovery project could become a learning environment for student apprentices.

- Develop a sufficient number of courses in historic preservation to comprise a "minor," possibly establishing an exchange program with European colleges with that specialty

Goal Five. Increase the applications of art and design into more locally produced goods.

A. Identify opportunities for branding and linking local artisanal foods and personal care products to culinary arts

The rapid growth in demand for local and artisanal foods provides an opportunity to develop new brands of local food and connect them to both the marketing of art and to the culinary arts program at Sheridan College. Although this is currently a small network, it could be expanded to include the Crow and Northern Cheyenne and the Hutterites across the Montana border and thereby quickly achieve greater scale, and increase the range of products available at the Farmers' Market at Whitney Commons. The culinary arts program at the college could stimulate new products by, for example, introducing regional choices on the menu of its restaurant, and it could hold an annual competition similar to the welding competition for best recipes based on regional foods. A competition might be held, among teams of culinary artists and designers, for the most creative new local culinary products. These efforts might be linked to on-going efforts of the local organization "Inspired Learning Environments" to establish a network of organizations interested in local and healthier foods and to educate children in developing healthier diets.

- Inventory the regional food and health and personal care products, their current markets and production capabilities.
- Hold an annual competition for local foods and food and health and personal care products preparations.
- Establish a "kitchen incubator" with industrial food preparation equipment and design support that could be shared by entrepreneurs.

B. Increase the use of regional products by builders, architects, and designers.

Home furnishings was one of the Forward Sheridan plan's target industries. The core talent in wood and metal art and ceramics could be a foundation for developing (through the schools) and recruiting home furnishing companies, with an emphasis on links to western culture, both traditional and modern. It

would require a close working relationship among artists, architects, and interior designers to coordinate the use of local art. The past two summers, HandMade in America and the Toe River Arts Council have organized shows at an exclusive housing community somewhat similar to Powderhorn for builders, architects, and interior designers from across the region.

Asheville Buncombe Community College in North Carolina, with help from HandMade in America, has developed a new certificate program for artists in their construction trades. The program helps artists develop a portfolio of products that can be used in new homes and it provides guidance on how to talk to architects and builders. Forty-five artists have taken the program thus far.

- Identify those artists from the region and surrounding regions that produce goods that would be of interest to architects, builders, and interior designers and set up a meeting to assess the level of interest among potential buyers and the range of capabilities of artists.
- Create and distribute, perhaps in cooperation with Billings and Casper, a catalog of juried artisan and artists' products that can be used in designing and building and/or decorating new or renovated homes.

C. Develop incentive packages to attract and retain young designers or bring more artists to the area.

In today's economy, incentives for creative young people are becoming as important as incentives for new business investment were in the past. Talented youth are essential to a technology-oriented creative economy, and have proven difficult to attract and keep. A set of incentives coupled with investments in appropriate amenities could make the difference. If some incentives, such as renovation grants or partial property tax abatements were linked to certain housing or studio space, it could also help restore existing downtown structures and strengthen city centers. Paducah, Kentucky, is one of many small cities that have assembled innovative packages to attract artists.

Artist Relocation Incentives: In 2001 Paducah, Kentucky, in an effort to rebuild a decaying, drug infested area of the city and to strengthen its economy, began offering incentives to artists to relocate there: \$2,500 reimbursements for design or renovation of buildings and 100% financing of low interest loans. The city has become a poster child for building an arts community.

- Explore the value of a package of incentives that would attract young designers and artists to the region.

Goal Six. Promote the region's creative assets more aggressively and effectively

A. Produce a regional magazine on local arts, entertainment, and culture.

A regional publication that highlights the region, with stories about artists, events, places to visit, and the history of the region, that would be distributed at hotels, and airports and sent to travel agencies, would make the region's creative side better known. The publication could present an opportunity for substantive and critical review of the arts in Sheridan and Johnson Counties. Arts communities throughout the country have created publications like this, some of which are four-color with high-end graphic design. The publication functions as a marketing tool and as an arts image-enhancement. Such a magazine would require considerable financial backing from advertisers and possibly foundations, but the region is home to so many good writers and photographers, it should not be difficult to produce a high quality publication.

- Establish a committee of artists, writers, business owners, and journalists to develop a plan for the content, style, production, marketing, and distribution of such a publication.
- Estimate the costs and potential direct and indirect revenue and apply for support.

B. Encourage increased media coverage.

In many arts-identified regions in the country, local and regional newspapers serve as one of the most effective branding and promotional vehicles. Newspapers either publish an Arts and Culture Section, most on a weekly basis, or they assign reporters or freelancers to publicize and cover arts events. In such towns, whether it's a daily or weekly, the newspapers carry stories about upcoming events, review past events, and describe new developments. Given the scale and the substance of the arts and creative economy in the counties, we believe that a higher profile of the arts is called for from the local media, one that highlights major events, reviews shows, and generally pays attention to the creative parts of the region's economy.

- Develop a network to regularly submit stories to the local press.
- Encourage media to establish close relationships with Council and initiate a regular arts and culture section.

C. Establish Western arts and heritage trail from Kaycee to Billings J.as a “museum without walls”

Trails, which have become popular tourism strategies, are now seen also as economic development. The Appalachian Regional Commission has funded crafts, garden and music trails across regions of Appalachia. One of the most successful, “Craft Trails of Western North Carolina,” has found that of those who take the trails, 94 percent buy something and more than 70 percent spend more than \$100. The idea for a museum without walls, first suggested in a report for Billings, could be easily extended through the two counties but also expanded to include artists and

E-commerce for artists: Sheridan College, as part of its membership in CraftNet, is already part of a process supported by the Appalachian Regional Commission to develop a community college curriculum to teach artists to use e-commerce more effectively. Sheridan, through its membership, has access to well developed entrepreneurial curricula such as “Artrepreneurship” in Montana and “Real Enterprises” in North Carolina. By drawing on existing tested models,

galleries. The similarities in history and culture across Montana’s southern border, the proximity to the Crow and Northern Cheyenne reservations, and the use of the Billings airport to access the region make this an ideal trail to collaboratively market.

- Identify counterpart organizations in surrounding regions to form creative economy partnership and jointly develop shared marketing and touring materials with trails across adjacent regions.

VI. Initial Steps

The project's Steering Committee should become the nucleus of a Regional Creative Economy Council, with Steering Committee members forming the basis for the Council but ultimately expanding to possibly include representatives from city governments and the economic and business community and from artists and arts organizations in Buffalo and other towns in the region.

The Council would elect co-chairs to oversee its work and form Working Groups or Task Forces around those specific recommendations it chooses to implement. We suggest that the Council be organized as a volunteer group to begin and gradually work its way to a more formalized structure, perhaps with staff, once it has track record and set of accomplishments.

As a first order of business, projects and programs that are already in progress should receive the highest priority. These might include, but not be limited to, the SAGE-initiated Arts Center, the development of the new Entrepreneurial Education program and Center and possible incubator at Sheridan College, the integration of the Creative Economy into regional development and the work of local and regional development organizations, and further expansion of local art work in area businesses. In these projects and programs, Council members should provide whatever technical and organizational support that is required to keep these initiatives moving along.

Other projects and programs that merit early attention from the Council include the following.

- A public, community-wide event in the fall to introduce the Creative Economy Plan to the region.
- The conversion of upper floor space in downtown buildings for arts-related uses.
- New and improved signage for sites of cultural or artistic interest.
- Creation of a new web site for the region's Creative Economy.
- Creating programs and events that are targeted to young people and young artists – keeping young people in the region is a major priority.
- Increasing the use of regional arts, crafts, and handcrafted architectural elements in second homes and new businesses.

Longer-term projects and programs can be worked once the above-noted projects have some momentum. These include, for example, the development of a new arts and culture publication, better mapping of the downtown, the development of an interpretative tour, increasing press coverage, and establishing the Museum Without Walls.

Appendix A: Methodology

A. Sources of Information

Information was gathered via:

- 9 person-visits
- 83 Individual interviews in person, by phone, or in focus groups with individuals and groups suggested by the steering committee or from research into the area
- On-line survey of artists and businesses, with 63 and 85 responses, respectively
- Analysis of state, federal, and private economic data bases
- Review of companies and individuals listed in phone directories and membership lists of business, trade, and arts organizations
- Review of recent economic analyses
- Scans of web sites
- Visual inspections
- Meetings with Steering Committee
- Phone calls to confirm or interpret information
- Published materials about area's features, history, and economy

B. Measuring Scale of Creative Economy

Since the creative economy does not easily lend itself to easy identification, determining the scale and scope took a series of iterative steps.

1. Selected the industry classifications to be included in the Creative Economy based on previous studies conducted by the authors of this report and others.
1. Began with the information on establishments and employment in the County Business Patterns and the Employment Security Data form unemployment insurance, both of which suppress some data in nonmetropolitan counties.
2. Added the self employment data from the U.S. Census Bureau's Non-employer statistics for 2005.

3. Compared the numbers to the list of companies listed by Dun & Bradstreet (D&B), obtained from the regional economic development office and used the higher of the two.
4. Compared the Dun & Bradstreet (D&B) lists with the Yellow pages and added those not included in D&B, calling where necessary to obtain number of employees.
5. Added design-oriented manufacturers listed in Yellow Pages after phone calls or web page scans to confirm the local design content.
6. Called school system to obtain numbers of arts teachers.
7. Obtained number of Native American Artists in Crow and Northern Cheyenne Tribes from Montana Arts Council.
8. Used memberships of arts organizations and their estimates of proportions that were full-time artists to estimate number of full-time equivalent artists in the region.
9. To find artists not represented by organizations, utilized "snowball" process of asking each artist/craftsperson identified for names of others in similar field.

Appendix B Lead Authors

Dr. Stuart A. Rosenfeld is Founder and Principal of Regional Technology Strategies, Inc. located in Carrboro, North Carolina (<http://www.rtsinc.org>). He previously served as deputy director of the Southern Growth Policies Board, an interstate compact representing the governments of southern states, where he founded and directed the Southern Technology Council. Rosenfeld founded and manages the Trans-Atlantic Technology and Training Alliance, a consortium of U.S. and European community colleges. Prior to joining Southern Growth, he was a Senior Associate at the National Institute of Education, directed a school in Vermont, and worked for ten years in manufacturing management for the General Electric Company. He has advised or testified before more than a dozen panels and committees of the U.S. Congress, the National Academy of Sciences, and the Organization of Economic Cooperation and Development and has more than 100 publications.

Mr. Michael Kane, Mt. Auburn Associates, has been a practitioner as well as researcher in the community and economic development field for more than 25 years. He specializes in regional creative economies, economic development planning, sector analysis and organizing, and positioning higher educational institutions to better capitalize on their economic and workforce development assets. Michael was a key architect of recent reports and plans prepared by Mt. Auburn Associates, including: *The Creative Economy Initiative: The Role of Arts and Culture in New England's Economic Competitiveness*, *The Creative Engine: How Arts & Culture is Fueling Economic Growth in New York City Neighborhoods*, *The Economic Role & Impact of Lincoln Center, Inc.*, and *Louisiana: Where Culture Means Business*.

Mr. Robert Goodman, an architect, builder, and a former architecture critic for the *Boston Globe*, is currently Professor of Environmental Design at Hampshire College where he teaches architecture, urban planning, and public policy. Professor Goodman has taught at MIT, Columbia University, the University of California at Los Angeles and Berkeley, and the Architectural Association in London. His work has been exhibited at New York's Museum of Modern Art and his designs have won awards for new construction and historic preservation, including first prize, with Ashley Meyer and Associates, as a designer for the Boston Architectural Center. A recipient of a Guggenheim Fellowship, Goodman has also testified on urban planning, housing, and economic development before state and local governments, as well as the United States Congress.

Appendix C
Approximate Mapping of Downtown Sheridan with “Creative Establishments” in Bold

Algiers Street

Rainbow Bar
 Brian’s Boot & Shoe
 Keen Shoes
Accents on Wyoming Log Furniture
 JC Penny (original sign)
Dan’s Work Wear
 First Real Estate
 Sports Stop
Sheridan Stationery & Books
Foot of Big Horn
DJ Coins & Leathercraft
Bozeman Trail shop (gallery)
Don King Saddlery
Over the Moon
Twilight Spa & Salon
Java Moon
Little Willow Traders
Lucinda’s Gallery
Corral West Ranchers
Hair We Are
 Sheridan Palace Restaurant
Foothills Gallery
High Mountain Mercantile
Crazy Moon Trading
 Beaver Creek Saloon

Insuring Wyoming
2nd Chance CD
Sheridan Coins
 Street Wear Clothing
CB Music & Repair
Old Press Building
 All State Insurance
Alley way

Flyshop of the Bighorns
Lily Rose Boutique
45th Parallel Jewelry & Gifts
 White Swan Barber shop
 State Farm
Big Horn Design

Smith Street

Mint Bar
Yoga with goods
 Olivia’s Kitchens
 Smith & Barney
Kitchen Store (high end)
 Willey’s Lounge
 Men’s shop
Book Shop

Brundage Street

Hallmark
WYO Theatre
Davis gallery
 Realtor
 Bank of the West

Olivers
 Realty
Bales Flowers
Jeweler
 Flagstaff Café

Loucks Street

First Interstate Bank
Silva and Gold Engraving
Bella Graphics
 Attorneys
Window Works Interior Design
 Door 54 accessories

Drug Store (historic)
 JD Nathans
Ye Olde Book Store
 Insurance
 Tumbleweed (smoothies)
 Internet

Works Street

