



Market Assessment & Positioning Study Findings & Recommendations

OCTOBER 2023



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Engagement Timeline

- ✓ 27 Weeks 2/22/23 thru 8/16/23
- ✓ Study Launch (Week 1) 2/22/23
- ✓ Study Materials Finalized (Week 7) 4/06/23
- ✓ Interview Packets Mailed (Week 8) 4/14/23
- ✓ Calls for Interviews Began (Week 9) 4/18/23
- ✓ Interviews Began (Week 10) 4/24/23
- ✓ All Interviews Completed (Week 21) 7/12/23

Overview of Interviewees

- ✓ 74 interviews conducted over 9 weeks
- ✓ 39 In-Person; 33 via Zoom; 2 via Telephone
- ✓ Candid & confidential responses

Roster of Interviewees

Billy Joe Anoatubby

Governor
Chickasaw Nation

Chris Anoatubby

Lieutenant Governor
Chickasaw Nation

Austin Ball

Ward 1 Councilmember
The City of Norman, OK

Kelley Barnes

VP Community Engagement
Oklahoma City Community
Foundation

Janet K. Braun, Ph.D.

Director
Sam Noble Oklahoma
Museum of Natural History

Rodger A. Brown, Ph.D.

Retired, Research
Meteorologist
NOAA's National Severe
Storm Laboratory

Chris Bruehl

Director of Appointments,
Office of Governor J. Kevin
Stitt
State of Oklahoma

Donald Burgess

Retired, Research Fellow
CIWRO
The University of Oklahoma

Sean Burrage, J.D.

VP of Executive Affairs &
Chief of Staff
The University of Oklahoma

DaNa L. Carlis, Ph.D.

Director
NOAA's National Severe
Storm Laboratory

Frederick H. Carr

Meteorologist / Professor
Emeritus
The University of Oklahoma,
School of Meteorology

Joe Castiglione, M.Ed.

VP for Intercollegiate
Athletics Programs &
Director of Athletics
The University of Oklahoma

Rod Cleveland, Chair

County Commissioner
District 1
Cleveland County, OK

Tom J. Cole, Ph.D.

House Representative –
Oklahoma's 4th District
United States House of
Representative

Andrew G. Detwiler, Ph.D.

Former Pilot, T-28 Armored
Research Aircraft
South Dakota School of
Mines and Technology

**Kelvin K. Droegemeier,
Ph.D.**

Regent's Professor of
Meteorology
The University of Oklahoma,
School of Meteorology

Michael Eilts

General Manager of Weather
& Earth Intelligence
Spiral Global, Inc.

John Fisher

CEO
Brandywine Photonics

Pat Fitzgerald

President & CEO
National Cowboy & Western
Heritage Museum

Ann Forsyth

Community Volunteer
National Weather Museum
and Science Center

Holly Forsyth, SHRM-CP

DOT Compliance Specialist
Coffeyville Resources, LLC

Mike Foster

Retired, Meteorologist – In-
Charge
NOAA's National Weather
Service Forecast Office

**Elbert W. (Joe) Friday, Jr.,
Ph.D.**

Retired, Director, NOAA's
National Weather Service
Professor Emeritus, The
University of Oklahoma

Michael Gauthier, Ph.D.

Senior Manager, Climate and
Earth Sciences
Lockheed Martin Corporation

Christy Gillenwater, CCE

President & CEO
Greater Oklahoma City
Chamber

Roster of Interviewees

Brenda Granger
Executive Director
Oklahoma Museums
Association

Helen Grant
Ward 4 Councilmember
The City of Norman, OK

Rusty Grissom
County Commissioner
District 3
Cleveland County, OK

Joseph Harroz, Jr., J.D.
President
The University of Oklahoma

Larry Heikkila
Mayor
The City of Norman, OK

David Holt, J.D.
Mayor
City of Oklahoma City, OK

Stephen T. Hollman
Ward 7 Councilmember
The City of Norman, OK

Pat Hyland, CCM
Meteorologist & Severe
Weather Researcher
CIWRO, The University of
Oklahoma

Gayland Kitch, OCEM
Director, Emergency
Management
The City of Moore, OK

Kevin Kloesel, Ph.D.
Director, Oklahoma
Climatological Survey
The University of Oklahoma,
College of Atmospheric &
Geographic Sciences

Phil Lakin, Jr.
District 8 Councilmember
City of Tulsa, OK &
CEO, Tulsa Community
Foundation

Bob Laughrea
Principal
Generis Collective

Sherry Marshall
John E. Kirkpatrick President
/ CEO
Science Museum Oklahoma

Elizabeth McKinney, Ed.S.
Co-Founder and CEO
Economic Strategy
Professionals

**Lawrence McKinney, CEcD,
CCE**
President and CEO
Norman Economic
Development Coalition

Nick Migliorino, Ph.D.
Superintendent
Norman Public School
District

Jen Miller, Ed.D.
Manager of Secondary
Science
Tulsa Public Schools

**Bree Montoya, CPA/ABV,
SVA**
Ward 3 Councilmember
The City of Norman, OK

Berrien Moore, Ph.D.
Dean, The University of
Oklahoma, College of
Atmospheric & Geographic
Sciences
Director, NOAA's National
Weather Center

Cyndi A. Munson
State Representative,
House District 85
State of Oklahoma House of
Representatives

Amy Noah, M.B.A.
VP and Chief Advancement
Officer
The University of Oklahoma
Foundation

David Nimmo
President
Chickasaw Nation Industries

Dirk P. O'Hara, Esq.
Board President
Norman Public Schools
Board of Education

Robert D. Palmer, Ph.D.
Executive Director, Advanced
Radar Research Center
The University of Oklahoma

Levi Patrick
Executive Director
Tulsa Regional STEM
Alliance

Roster of Interviewees

Guy L. Patton, M.A.

President and CEO
The University of Oklahoma
Foundation

Matthew Peacock, AIA, LEED

Ward 8 Councilmember
The City of Norman, OK

Darrell Pyle

City Manager
The City of Norman, OK

Matt Pinnell

Lieutenant Governor
State of Oklahoma

Warren L. Qualley

Retired, Manager Weather
Services
American Airlines, DFW Airport

**Lindsay G. Robertson, J.D.,
Ph.D.**

Professor
The University of Oklahoma,
College of Law

Jacob Rosecrants

State Representative,
House District 46
State of Oklahoma House of
Representatives

Wayne R. Sand, Ph.D., CCM

Former Pilot, T-28 Armored
Research Aircraft
Big Sky Wealth Consulting

Dan Schemm

Executive Director
VisitNorman

Lauren Schueler, M.Ed

Ward 2 Councilmember
The City of Norman, OK

Elizabeth Smith, Ph.D.

Research Meteorologist
NOAA's National Severe Storm
Laboratory

Chris Sohl

Retired, Forecaster
NOAA's National Weather
Service Forecast Office

James Spann

Founder and General Partner
Boyd Street Ventures

Rob Standridge

State Senator, District 15
State of Oklahoma Senate

Rick Smith

Warning Coordination
Meteorologist
National Weather Service's
Norman Forecast Office

Chuck Thompson

Managing Partner & President
The American Investment
Group

Trait Thompson

Executive Director
Oklahoma Historical Society

Reed Timmer, Ph.D.

Extreme Meteorologist /
Storm Chaser
Dominator 3

Kit Wagner

Retired, Air Pollution
Meteorologist

Tom A. Warner

Research Scientist & Former
Pilot, T-28 Armored Research
Aircraft
Director, Ludwick Family
Foundation

Kari F. Watkins

President and CEO
Oklahoma City National
Memorial Museum

Allen Zahrai

Meteorologist / Research
Assistant
CIWRO, The University of
Oklahoma

Ginger Zee

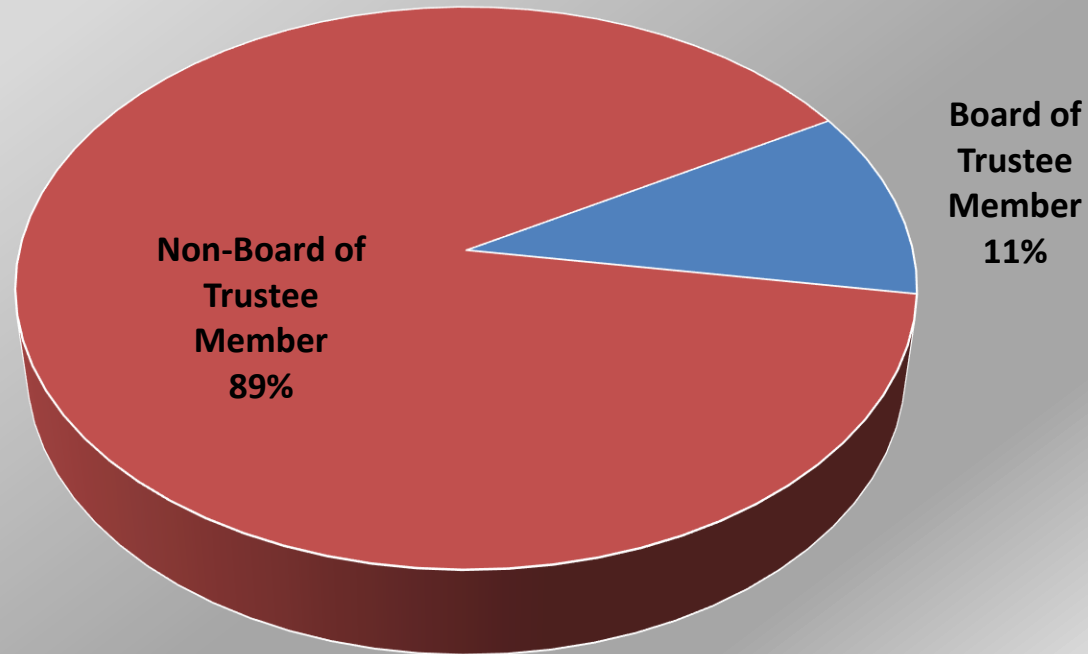
Chief Meteorologist
ABC News

Dusan S. Zrnich, Ph.D.

Senior Research Scientist
NOAA's National Severe Storm
Laboratory

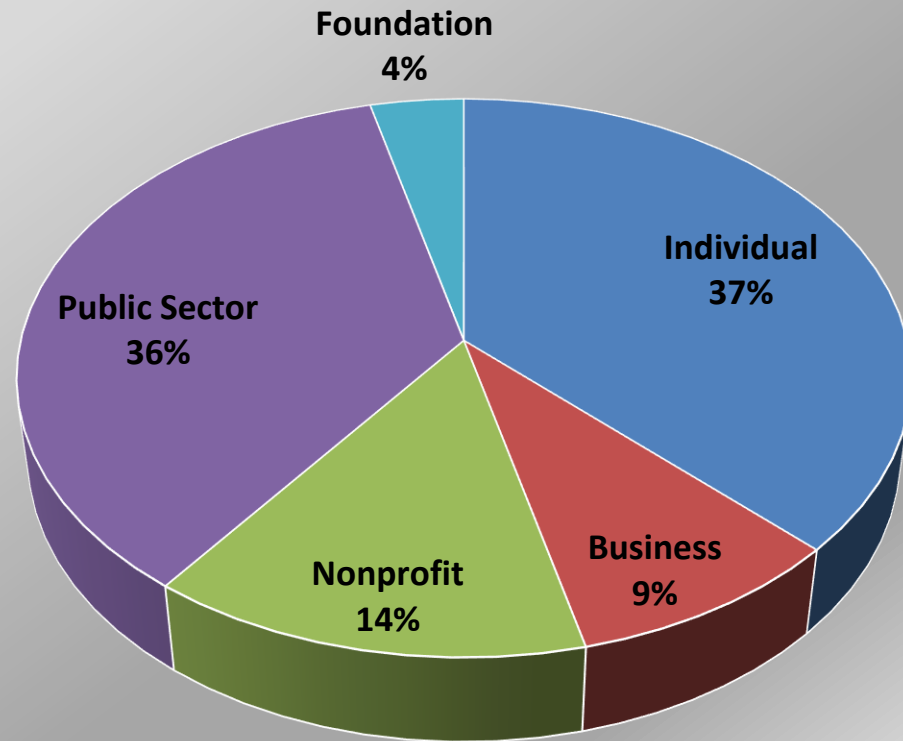
Overview of Interviewees

Donor Affiliation



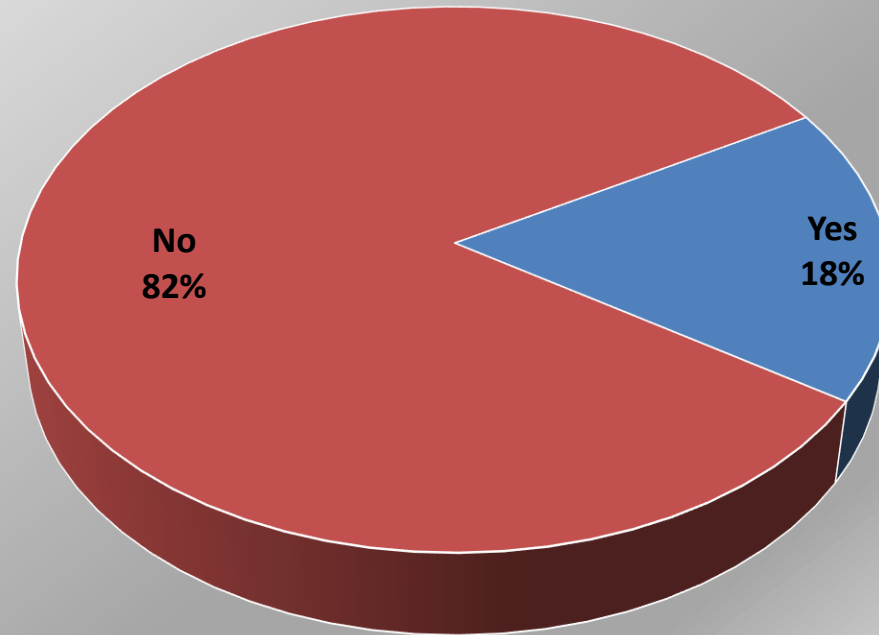
Overview of Interviewees

Donor Type



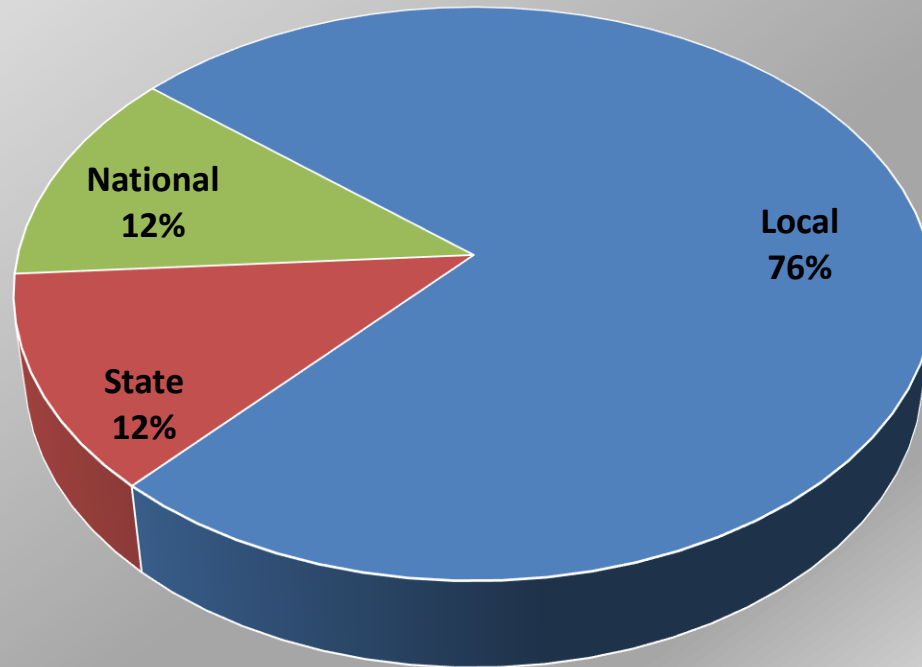
Overview of Interviewees

Previous NWMSC Donor



Overview of Interviewees

Donor Location / Orientation



Assessment of Asking Rights

- ✓ Compelling Need and Sense of Urgency
- ✓ Organizational Effectiveness and Funding Strength
- ✓ Effective Plan to Meet Need
- ✓ Constituency has Adequate Resources
- ✓ Potential Campaign Leaders Available and Interested/Committed

Memorable Quotes

“Weather is in the DNA of Oklahomans.”

-Longtime Oklahoma Resident

“Everybody in Oklahoma is a Meteorologist. Some are just better in math and science than others.”

-Self Proclaimed Amateur ‘Weather Nerd’

“This project has the potential to unify the Norman Community . . . to create a fresh, new brand for Norman.”

-Several Elected Officials ‘On Both Sides of the Aisle’

Findings

Compelling Need and Sense of Urgency

Importance of Museum Efforts

(1 being unimportant and 10 being very important)

	1-2	3-4	5-7	8-10	Unsure
To Norman / Cleveland County	0%	1%	3%	90%	6%
To Oklahoma	0%	1%	27%	56%	16%
To Interviewee Personally	0%	1%	25%	71%	3%

Findings

Compelling Need and Sense of Urgency

NWMSC's Greatest Opportunities

- Capitalizing on ideal timing given Norman's collective visioning, momentum, and alignment towards unprecedented success
- Reaffirming itself on much grander scale as the only dedicated weather museum and science center in the United States
- Helping stake Norman's claim as the weather tourism capital of world
- Offering visitors exciting and entertaining weather experiences; building something special in Oklahoma's 3rd largest city
- Promoting STEM education for K-12 and adult learners
- Expanding its Board of Trustees and strategic partners

Findings

Compelling Need and Sense of Urgency

NWMSC's Greatest Challenges / Obstacles

- Securing sufficient funding, especially from public sources
- Matching the moment. Developing a facility bold, visionary, and exciting enough to match the vast potential a topic like weather presents
- Achieving the right balance between museum, science, and entertainment
- Ensuring new facility is not a stand-alone operation
- Building a facility that is properly scaled to its surroundings
- Building a project that compliments, not competes, with other area tourist sites

Findings

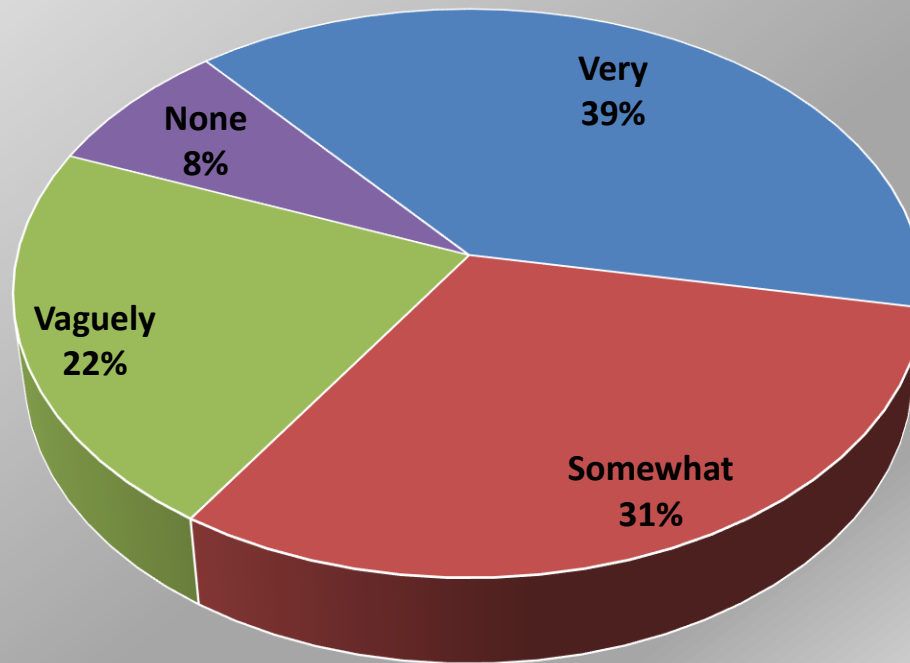
Compelling Need and Sense of Urgency

- *“Norman is the mecca of weather.”*
- *“It [museum] is a must for Norman. There are not many instances when communities can claim they have the ‘only one’ of something.”*
- *“NWMSC can be so much more than it is now. Norman already enjoys a huge presence from the weather enterprise . . . what I see as representing the intellect of weather. This new facility would represent the weather enterprise’s soul.”*
- *“Over 30% of our nation’s Gross National Product is impacted by weather. There is a 4% difference annually because of weather’s impact.”*
- *“The first Twister movie inspired me to pursue a career in weather. Just think of all the young people this facility would inspire!”*
- *“While Norman makes perfect sense for such a vision, do not think for a minute that some other community will not grab the idea and run with it if we do not.”*

Findings

Organizational Effectiveness / Funding Strength

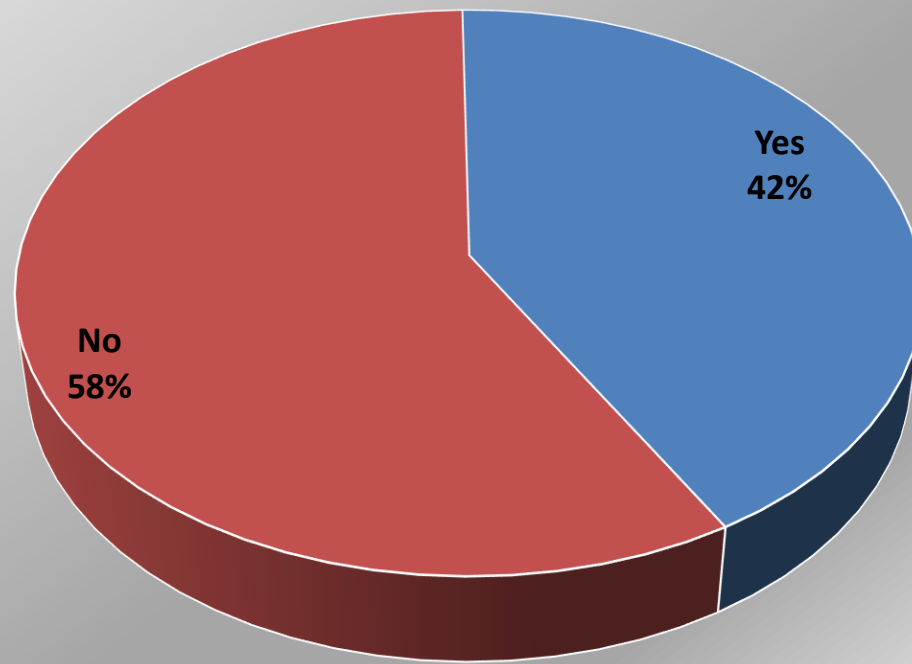
Familiarity with Museum



Findings

Organizational Effectiveness / Funding Strength

Interaction with Museum



Findings

Organizational Effectiveness & Funding Strength

Most Recognized Exhibits, Programs, and/or Accomplishments

- T-28 Research Aircraft
- Traveling Museum Trailer
- Norman Doppler Radar
- Brewing Up a Storm Special Event
- Weather Hall of Fame
- Keeping the Storefront Museum Open and Operational



“No greater moments at the museum than watching parents and children learn and experience weather together.”

Findings

Organizational Effectiveness & Funding Strength

Effectiveness of Museum

(1 being ineffective and 10 being very effective)

	1-2	3-4	5-7	8-10	Unsure
Museum as a Whole	0%	3%	42%	8%	47%
Museum Board of Trustees	0%	9%	13%	6%	72%
Museum Volunteers / Staff	0%	0%	7%	33%	60%

Findings

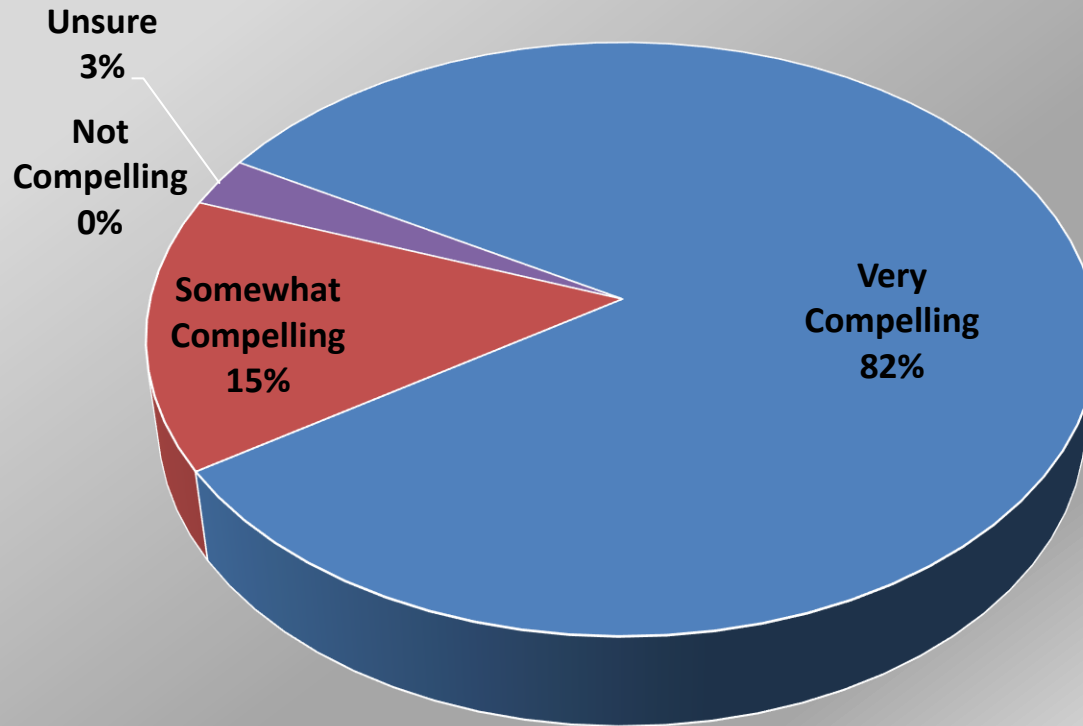
Organizational Effectiveness & Funding Strength

- *“I’ve been involved since Doug Forsyth asked me to help at its inception.”*
- *“They do a good job with what they have. It is hard to be larger and more effective without broader support.”*
- *“It is an organization run on ‘love’ by a dedicated group of volunteers.”*
- *“The Forsyth family and all the volunteers do a great job. They are what make the entire operation go.”*
- *“Ross [Forsyth] is excellent. Hard-working. I really applaud him for his dedication and passion.”*
- *“The board is comprised of some really dedicated, smart people. Chuck Thompson is strong. They just need help taking the museum to the next level.”*
- *“Making it through COVID without any government assistance was a huge accomplishment.”*
- *“I’ve been there twice and loved it.”*

Findings

Effective Plan to Meet Need

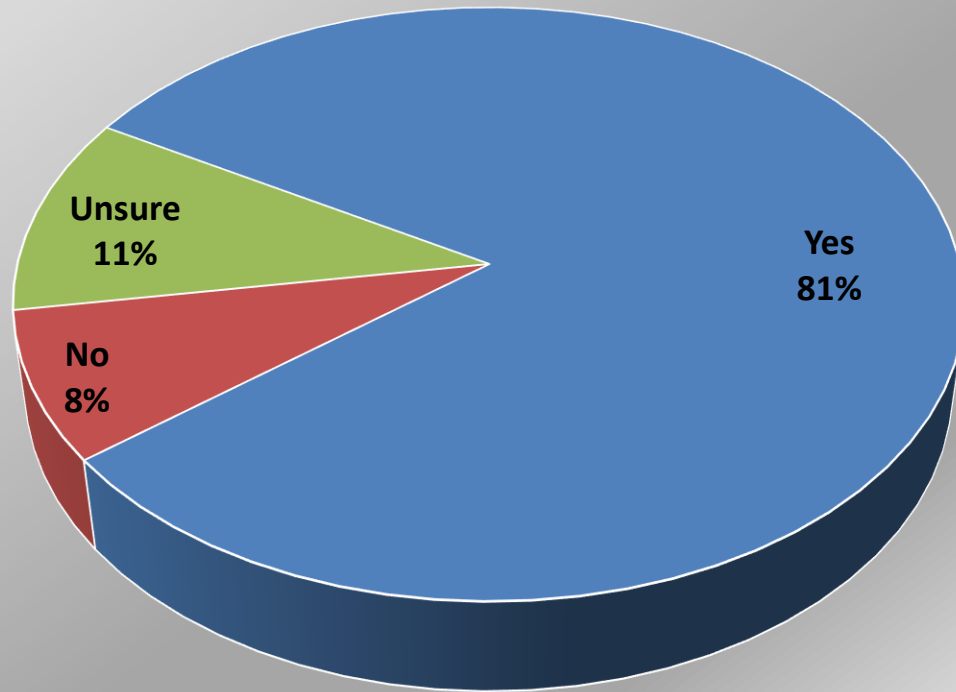
92% Interviewees Read *Discussion Draft*



Findings

Effective Plan to Meet Need

Is Norman Good Location?



Findings

Effective Plan to Meet Need

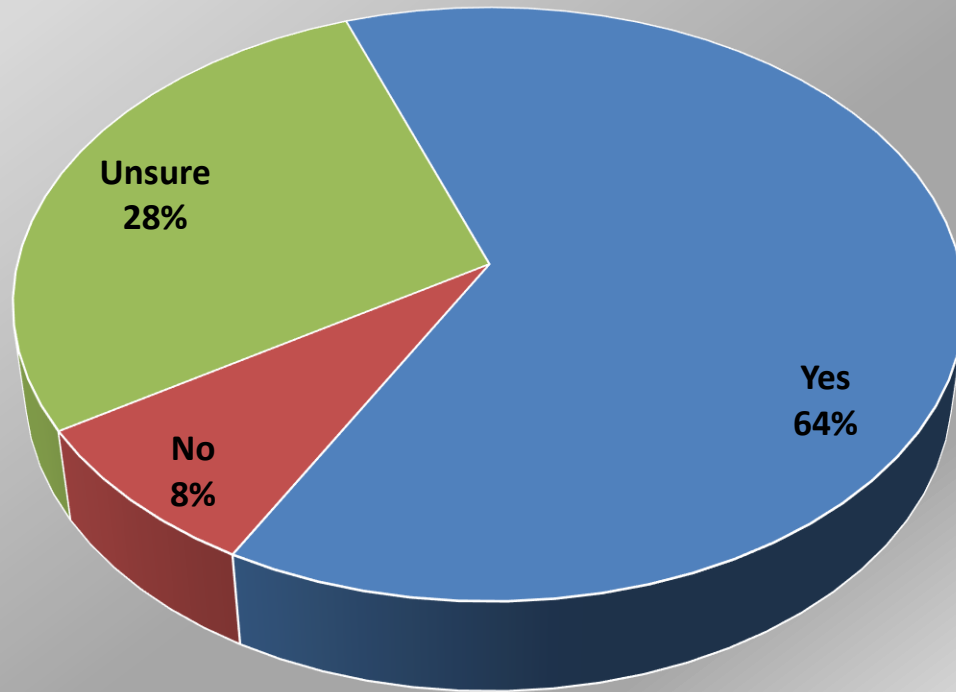
Rating the Project Components

	<u>Absolutely Needed</u>	<u>Largely on Target</u>
Site Development	63%	37%
New Facility	67%	33%
Exhibits	68%	32%
Educational Programs	72%	28%
Branding	65%	35%
Operating Enhancements & Endowment	54%	46%

Findings

Effective Plan to Meet Need

New Name?



Findings

Effective Plan to Meet Need

- *“There is no other place in the world that makes more sense for this project than Norman.”*
- *“Siting the new facility in University North Park’s entertainment district, and next to a new performance center, the Young Family Athletic Center, and an expanded airport is perfect! A once-in-our-lifetimes opportunity.”*
- *“Let’s make sure we hire a professional, top-notch public relations and marketing firm to help develop the name and brand.”*
- *“Must emphasize the word ‘experience’ in the name. Museums are boring!”*
- *“Current name is often confused with the National Weather Center.”*
- *“Use of word ‘national’ is a double-edge sword. On one hand, it suggests it’s the nation’s only one. On the other, it implies ‘government’.”*
- *“I like the current name, not its acronym.”*

Findings

Effective Plan to Meet Need

Project's Perceived Strengths

- Project will position Norman as “Weather Tourism Capital of World”
- Project will generate a positive net economic impact for Oklahoma in terms of creating more tourism revenue, helping new business recruitment and existing business retention efforts, and encouraging investment
- Project with help to increase and to promote STEM education for Oklahoma students
- Project will contribute to creating a strong, capable area workforce
- Project will contribute to creating a strong, resilient community

Findings

Effective Plan to Meet Need

Other Perceived Strengths

- Once-In-A-Lifetime Timing:
 - The University of Oklahoma joining the Southeastern Conference
 - Nearly \$1B investment into developing entertainment district and new performance venue
 - Release of Twisters movie
 - Proximity to Young Family Athletic Center
 - Oklahoma Aviation Academy (Norman Public Schools)
 - Expansion of National Weather Center
 - Development nearby of large tourist attractions (i.e., waterpark/resort near FAM, etc.)
 - RTA commuter rail project connecting Norman to Edmond
 - Local investment and expansion of aviation and satellite technology industries
 - Downtown Norman improvements
 - Expansion of Max Westheimer Airport

Findings

Effective Plan to Meet Need

Other Perceived Strengths (Continued)

- Existing strong interest in storm chasing both from domestic and international media, entertainment industry, visitors, researchers, and scientists
- Strong existing weather enterprise
- Uniqueness; nothing of its kind currently exists; a world-class attraction
- Relevancy; 100% of people hear/feel/see weather

Findings

Effective Plan to Meet Need

Project's Weaknesses

- Uncertainty whether \$115M is sufficient to achieve the vision
- Perceived and/or real struggles of other area museums and attractions in Norman, Oklahoma City, and Tulsa areas either to generate sufficient development capital and/or annual operational revenue
- Some regard Norman as less than ideal location given population size, geographic location, and past inability to close big deals
- State of Oklahoma Legislature's current "museum fatigue"

Findings

Effective Plan to Meet Need

Strengthening the Project

- Secure project site in or near entertainment district
- Develop more exciting, descriptive facility name
- Develop Partnerships
 - The Weather Channel; Alan Alda Center for Communicating Science; The University of Oklahoma; The University of Oklahoma; Norman Public Schools; Weather Enterprise in Norman including NWC, CIWRO, NSSL, etc.; Tulsa Regional STEM Alliance; South Central Climate Adaptation Science Center; National Centers for Environmental Information (ACEI)
- Create an internal panel of content creators heavily comprised of leaders in the weather enterprise; cover all types of global weather phenomenon
- Retain experts in developing overall facility concept including entertaining experiences; not too 'sciency'

Findings

Effective Plan to Meet Need

Strengthening the Project (continued)

- Develop Business Plan and Marketing Plan
- Perform independent Economic Impact Analysis
- Develop more detail on programmatic/educational offerings (K-12 and adult learning), exhibits, and experiences (in-person and virtual)
- Expanded content on following areas of interest: Aviation; Farming/Agriculture; Native Americans (heritage/adaptation); Animal Behavior
- Leverage “outdoor classroom” aspect of new facility to tie into and to promote Norman’s growing outdoor recreation and ecotourism offerings
- Develop Donor Naming Opportunities

Findings

Constituency has Adequate Resources

- Majority of Interviewees (56%) believe \$115 million fundraising goal is attainable from public and private sources (local, state, national, and international); Balance unsure (35%) or doubtful (9%)
- 93% of Interviewees agree on importance of Norman community (public and private), and those with close nexus, financially supporting the project first
- Consensus of Interviewees is approximately one-third of funding be sourced locally, one-third statewide, and one-third nationally

Findings

Constituency has Adequate Resources

- 77% of Interviewees offer at least one prospect capable of donating \$500K+:
 - 99 prospective donors listed (public sector, private foundations, corporations, and individuals)
 - 11 general industry categories; emphasis on weather enterprise, energy, aviation, and disaster recovery
- 81% rank new museum as a top charitable funding priority
- 83% of Private Sector Interviewees indicate a potential financial pledge
- 63% of Public Sector Interviewees indicate potential financial support from their respective governing body
- DonorSearch performed on 980+ 'in-house' NWMSC records; 80+ capable and confirmed to have made at least one major gift
- DonorSearch performed on 3,000 Norman residents; 477 capable of making major gift
- No current or planned local capital campaigns considered competition

Findings

Available & Interested Campaign Leaders

- ✓ 91 specific local, state, and national public and private sector individuals recommended as compelling campaign leaders
- ✓ 73% of Interviewees will consider leadership role
- ✓ 91% will consider participating as door-opener
- ✓ No red flags to speak of, support is broad

Recommendations

Bottom Line

Move Forward and Improve Asking Rights

All five elements of Asking Rights can and should be improved by following the findings and recommendations in this report

Recommendations

Move Forward and Improve Asking Rights

- NWMSC possesses sufficient asking rights to move forward
 - Weather is a compelling area of interest to remarkably wide domestic and international audiences; it holds a special place in the consciousness of Oklahomans
 - Norman is regarded as the ideal location given its unique concentration of the Weather Enterprise
 - Project timing is ideal; strong sense of urgency exists given Norman community's collective focus, momentum, and alignment towards unprecedented success
 - NWMSC benefits from numerous credible and effective public and private partners; wish to see the project become a reality and believe in its many potential positive impacts

Recommendations

Move Forward and Improve Asking Rights

- NWMSC possesses sufficient asking rights to move forward (continued)
 - Realizing the vision of a \$115M+, world-class experiential weather museum and science center in Norman, Oklahoma is appropriate and achievable
 - Sufficient public and private sector interest and resources existing to consider the \$115M+ funding goal achievable
 - The project and campaign will not lack from involvement and volunteer leadership of an impressive cadre of high-profile public and private sector leaders both locally and nationally