

BUSINESS CREATION, RETENTION, AND ATTRACTION SERVICES AGREEMENT				
MONTHLY REPORT: January 2025				
MEASURE		PERFORMANCE	WRITTEN REPORT	
1	PROSPECT VISITS WITHIN FOCUS AREAS		Industries	Potential expansion for existing food mfg, would create 200 jobs Local developer industrial project Data Center discussion Life Science
1.1	Ocala Prospect Visits (10)	4	Summary	
2	AIRPORT PARK, AIRPORT PROPER, AND/OR ADJOINING PROPERTIES		Industries	Summary :
2.1	Prospect Visits (3)	2		
2.3	Acres Sold or Leased (Vacant Property)	0		
2.4	Capital Investment	0		
2.5	Square Footage Sold or Leased (Existing Buildings)	0		
3	MARKETING & BUSINESS RETENTION		Industries	The Job Creation team attended the Shot Show and World of Concrete trade shows, as well as the InSite Marketing event in Tampa. LinkedIn marketing promoting the growth in Ocala.
3.1	New Contacts Established	120	Summary	
3.2	Leads Generated	40		
3.3	Targeted Marketing Campaigns (5)	4		



3.4	Business Retention Calls	12		
MEASURE		PERFORMANCE	WRITTEN REPORT	
4	FINANCIAL REVIEW COMMITTEE (QUARTERLY)		Industry (Project)	Next Dimension Construction
4.1	No. of Meetings	1	Date Attendance	
5	SITES AND BUILDINGS DATABASE			
5.1	Monthly Site Visits	68	Summary	
5.2	Total Listings	381		
5.3	Square Footage of Available Buildings	20,000,000+ SF		
5.4	Total Acreage Listed	31,415 Acres		
6	BUSINESS INCUBATOR (QUARTERLY)			
6.1	Incubator Registry	13 Incubator Partners	Demographics	6 Incubator Partners are Women Owned Businesses 3 Incubator Partners are Veteran Owned Businesses 1 Incubator Partner is Minority Owned
6.2	Occupancy Percentage	68%	Name of graduate and new business location.	
6.3	Demographics Summary (% minority owned)	See notes		
6.4	Graduates (3 per year)	None in January		



MEASURE		PERFORMANCE	WRITTEN REPORT	
7	BUSINESS ASSISTANCE AND FASTRAC COHORTS		Industries - First-Time Assistance Industries - Continued Assistance Training Summary	Business Creation conducted 8 Technical Assistance sessions with 8 new business owners. We continued our assistance with 2 individuals from the previous year. They were a part of a variety of industries, from Real Estate, Food Service to Mental Health Services.
7.1	First-Time Assistance Provided	8		We did not hold FastTrac, our first cohort begins in April. We will have 2 cohorts completed for the year.
7.2	Continued Assistance Provided	2		
7.3	Fastrac Training Held	0		
7.4	Fastrac Participants from or starting in Target Areas			
7.5	NEXTworking -Students (300)			
7.6	NEXTworking -Businesses (35)			
8	DOWNTOWN AND MIDTOWN ACTIVITIES		Industries Type of Assistance: Location (#) Operational (#) Financial (#) Planning (#)	
8.1	Downtown and Midtown Business Assistance	13		
9	FLORIDA COMMERCE		Summary	Regular communication.
9.1	Communication			
10	FINANCIAL REPORT- QUARTERLY (PARAGRAPH 2.14)		Employee and summary of activities.	Job Creation team: Heather Shubirg, Bart Rowland, Bryce Morrison, Erin Jones This team works with existing businesses and potential newcomers to remove any barriers to growth.
10.1	No. of Employees assigned to Ocala Services	7		Business Creation team: Evelyn Reyes, Jessica Michel, Freddie Morris This team works with entrepreneurs to educate, advocate, and guide them through all stages of business creation and growth.



BUSINESS CREATION, RETENTION, AND ATTRACTION SERVICES AGREEMENT

MONTHLY REPORT: February 2025

MEASURE		PERFORMANCE	WRITTEN REPORT	
1	PROSPECT VISITS WITHIN FOCUS AREAS		Industries	Florida Huddle reception at OCF Project Flower visit - plastics mfg. Logistics project Home goods mfg.
1.1	Ocala Prospect Visits (10)	3	Summary	
2	AIRPORT PARK, AIRPORT PROPER, AND/OR ADJOINING PROPERTIES		Industries	Project Flower
2.1	Prospect Visits (3)	1	Summary	
2.3	Acres Sold or Leased (Vacant Property)			
2.4	Capital Investment			
2.5	Square Footage Sold or Leased (Existing Buildings)			
3	MARKETING & BUSINESS RETENTION		Industries	Florida Huddle reception at OCF. LinkedIn post celebrating HCA Nursing update. CEP Annual Luncheon.
3.1	New Contacts Established		Summary	
3.2	Leads Generated			
3.3	Targeted Marketing Campaigns (5)	3		
3.4	Business Retention Calls			

MEASURE		PERFORMANCE	WRITTEN REPORT	
4	FINANCIAL REVIEW COMMITTEE (QUARTERLY)		Industry (Project)	
4.1	No. of Meetings		Date Attendance	
5	SITES AND BUILDINGS DATABASE		Summary	
5.1	Monthly Site Visits	74		
5.2	Total Listings	385		
5.3	Square Footage of Available Buildings	20,000,000+ SF		
5.4	Total Acreage Listed	31,415 Acres		
6	BUSINESS INCUBATOR (QUARTERLY)		Demographics Name of graduate and new business location.	6 Incubator Partners are Women Owned Businesses 3 Incubator Partners are Veteran Owned Businesses 1 Incubator Partner is Minority Owned
6.1	Incubator Registry	14 Incubator Partners		
6.2	Occupancy Percentage	72%		
6.3	Demographics Summary (% minority owned)	See Notes		
6.4	Graduates (3 per year)	No Graduates for Feb		



MEASURE		PERFORMANCE	WRITTEN REPORT	
7	BUSINESS ASSISTANCE AND FASTRAC COHORTS		Industries - First-Time Assistance Industries - Continued Assistance Training Summary	
7.1	First-Time Assistance Provided	6		
7.2	Continued Assistance Provided	4		
7.3	Fastrac Training Held	0		
7.4	Fastrac Participants from or starting in Target Areas	0		
7.5	NEXTworking -Students (300)			
7.6	NEXTworking -Businesses (35)			
8	DOWNTOWN AND MIDTOWN ACTIVITIES		Industries Type of Assistance: Location (#) Operational (#) Financial (#) Planning (#)	
8.1	Downtown and Midtown Business Assistance	14		
9	FLORIDA COMMERCE		Summary	3 RFI's submitted to Florida Commerce this month. Project Plum, Factory, and Next
9.1	Communication	3		
10	FINANCIAL REPORT- QUARTERLY (PARAGRAPH 2.14)		Employee and summary of activities.	Job Creation team: Heather Shubirg, Bart Rowland, Bryce Morrison, Erin Jones This team works with existing businesses and potential newcomers to remove any barriers to growth. Business Creation team: Evelyn Reyes, Jessica Michel, Freddie Morris This team works with entrepreneurs to educate, advocate, and guide them through all stages of business creation and growth.
10.1	No. of Employees assigned to Ocala Services	7		



BUSINESS CREATION, RETENTION, AND ATTRACTION SERVICES AGREEMENT

MONTHLY REPORT: March 2025

MEASURE		PERFORMANCE	WRITTEN REPORT	
1	PROSPECT VISITS WITHIN FOCUS AREAS		Industries	UK Equestrian Manufacturing Company visited for US Expansion site interest. Project Cabin discussion to expand and add new production facility in Ocala.
1.1	Ocala Prospect Visits (10)	1	Summary	
2	AIRPORT PARK, AIRPORT PROPER, AND/OR ADJOINING PROPERTIES		Industries	
2.1	Prospect Visits (3)		Summary	
2.3	Acres Sold or Leased (Vacant Property)		Circularix signed	
2.4	Capital Investment	\$25,000,000	lease at Airport	
2.5	Square Footage Sold or Leased (Existing Buildings)	131,000	Logistics Park.	
3	MARKETING & BUSINESS RETENTION		Industries	Attended IAMC in Sacramento and sponsored Florida Commerce Reception, showcasing marketing materials for Airport and surrounding sites. Attended AEDL conference and met with 8 site selectors. Attended Site Selector Guild event and met with 25 site selectors.
3.1	New Contacts Established	10	Summary	
3.2	Leads Generated			
3.3	Targeted Marketing Campaigns (5)	1		
3.4	Business Retention Calls	18		

MEASURE		PERFORMANCE	WRITTEN REPORT	
4	FINANCIAL REVIEW COMMITTEE (QUARTERLY)		Industry (Project)	
4.1	No. of Meetings		Date Attendance	
5	SITES AND BUILDINGS DATABASE		Summary	
5.1	Monthly Site Visits	94		
5.2	Total Listings	389		
5.3	Square Footage of Available Buildings	20,000,000+ SF		
5.4	Total Acreage Listed	31,415 Acres		
6	BUSINESS INCUBATOR (QUARTERLY)		Demographics Name of graduate and new business location.	6 Incubator Partners are Women Owned Businesses 3 Incubator Partners are Veteran Owned Businesses 1 Incubator Partner is Minority Owned
6.1	Incubator Registry	14 Incubator Partners		
6.2	Occupancy Percentage	72%		
6.3	Demographics Summary (% minority owned)	See notes		
6.4	Graduates (3 per year)	None for March		



MEASURE		PERFORMANCE	WRITTEN REPORT	
7	BUSINESS ASSISTANCE AND FASTRAC COHORTS		Industries - First-Time Assistance Industries - Continued Assistance Training Summary	
7.1	First-Time Assistance Provided	19		
7.2	Continued Assistance Provided	11		
7.3	Fastrac Training Held	0		
7.4	Fastrac Participants from or starting in Target Areas	0		
7.5	NEXTworking -Students (300)			
7.6	NEXTworking -Businesses (35)			
8	DOWNTOWN AND MIDTOWN ACTIVITIES		Industries Type of Assistance: Location (#) Operational (#) Financial (#) Planning (#)	
8.1	Downtown and Midtown Business Assistance	14		
9	FLORIDA COMMERCE		Summary	4 RFI's submitted to Florida Commerce. Project Fossil, Hydrofoil, Blanco, and Lightspeed.
9.1	Communication	4		
10	FINANCIAL REPORT- QUARTERLY (PARAGRAPH 2.14)		Employee and summary of activities.	Job Creation team: Heather Shubirg, Bart Rowland, Bryce Morrison, Erin Jones This team works with existing businesses and potential newcomers to remove any barriers to growth. Business Creation team: Evelyn Reyes, Jessica Michel, Freddie Morris This team works with entrepreneurs to educate, advocate, and guide them through all stages of business creation and growth.
10.1	No. of Employees assigned to Ocala Services	7		

BUSINESS CREATION, RETENTION, AND ATTRACTION SERVICES AGREEMENT				
MONTHLY REPORT: April 2025				
MEASURE		PERFORMANCE	WRITTEN REPORT	
1	PROSPECT VISITS WITHIN FOCUS AREAS		Industries	CEO of HealthTrek, Life Science company, interest in the market for development Hosted Developer to the market from out of town with interest in the market to build.
1.1	Ocala Prospect Visits (10)	9	Summary	
2	AIRPORT PARK, AIRPORT PROPER, AND/OR ADJOINING PROPERTIES		Industries	Took Healthtrek and separate developers to the Airport and Insite Properties for onsite look
2.1	Prospect Visits (3)	2	Summary	
2.3	Acres Sold or Leased (Vacant Property)			
2.4	Capital Investment			
2.5	Square Footage Sold or Leased (Existing Buildings)			
3	MARKETING & BUSINESS RETENTION		Industries	Linked in Post celebrating the Business of Biotech and Celebration of Biotech events, promoting Ocala's Life science development opportunities
3.1	New Contacts Established	4	Summary	
3.2	Leads Generated	1		
3.3	Targeted Marketing Campaigns (5)	1		
3.4	Business Retention Calls	19		

MEASURE		PERFORMANCE	WRITTEN REPORT	
4	FINANCIAL REVIEW COMMITTEE (QUARTERLY)		Industry (Project)	Habitat for Humanity Project; April 9, 2025; 7 in attendance
4.1	No. of Meetings	1	Date Attendance	
5	SITES AND BUILDINGS DATABASE		Summary	
5.1	Monthly Site Visits	67		
5.2	Total Listings	390		
5.3	Square Footage of Available Buildings	20,000,000+ SF		
5.4	Total Acreage Listed	31,415+ Acres		
6	BUSINESS INCUBATOR (QUARTERLY)		Demographics Name of graduate and new business location.	5 Incubator Partners are Women Owned Businesses 2 Incubator Partners are Veteran Owned Businesses 1 Incubator Partner is Minority Owned April Graduate: Funky Unicorn Treats – Moved to Edwards Professional Complex in Ocala
6.1	Incubator Registry	13 Incubator Partners		
6.2	Occupancy Percentage	70%		
6.3	Demographics Summary (% minority owned)	See Notes		
6.4	Graduates (3 per year)	Funky Unicorn Treats		



MEASURE		PERFORMANCE	WRITTEN REPORT	
7	BUSINESS ASSISTANCE AND FASTRAC COHORTS		Industries - First-Time Assistance Industries - Continued Assistance Training Summary	
7.1	First-Time Assistance Provided	12		
7.2	Continued Assistance Provided	11		
7.3	Fastrac Training Held	5		
7.4	Fastrac Participants from or starting in Target Areas	15		
7.5	NEXTworking -Students (300)			
7.6	NEXTworking -Businesses (35)			
8	DOWNTOWN AND MIDTOWN ACTIVITIES		Industries Type of Assistance: Location (#) Operational (#) Financial (#) Planning (#)	
8.1	Downtown and Midtown Business Assistance	13		
9	FLORIDA COMMERCE		Summary	3 Project RFI's sent to Florida Commerce. Projects Maple, Cast, and Vimana Alta.
9.1	Communication	3		
10	FINANCIAL REPORT- QUARTERLY (PARAGRAPH 2.14)		Employee and summary of activities.	Job Creation team: Heather Shubirg, Bart Rowland, Bryce Morrison, Erin Jones This team works with existing businesses and potential newcomers to remove any barriers to growth. Business Creation team: Evelyn Reyes, Jessica Michel, Freddie Morris This team works with entrepreneurs to educate, advocate, and guide them through all stages of business creation and growth.
10.1	No. of Employees assigned to Ocala Services	7		

BUSINESS CREATION, RETENTION, AND ATTRACTION SERVICES AGREEMENT				
MONTHLY REPORT: May 2025				
MEASURE		PERFORMANCE	WRITTEN REPORT	
1	PROSPECT VISITS WITHIN FOCUS AREAS		Industries	Project Blanco, a cheese manufacturer, conducted a site visit of a building and potential BTS.
1.1	Ocala Prospect Visits (10)	2	Summary	
2	AIRPORT PARK, AIRPORT PROPER, AND/OR ADJOINING PROPERTIES		Industries	Hosted Whiting-Turner specializing in Life Science Development to market and the airport locations available. Our team facilitated the first Air Mobility Task Force meeting; follow up meeting scheduled.
2.1	Prospect Visits (3)	1	Summary	
2.3	Acres Sold or Leased (Vacant Property)			
2.4	Capital Investment			
2.5	Square Footage Sold or Leased (Existing Buildings)			
3	MARKETING & BUSINESS RETENTION		Industries	LinkedIn promotional marketing campaign. Attended SelectUSA Investment Summit and met with dozens of prospects, site selectors, contractors, EDO’s, brokers, and US Dept of Commerce.
3.1	New Contacts Established	55	Summary	
3.2	Leads Generated	25		
3.3	Targeted Marketing Campaigns (5)	2		
3.4	Business Retention Calls	17		

MEASURE		PERFORMANCE	WRITTEN REPORT	
4	FINANCIAL REVIEW COMMITTEE (QUARTERLY)		Industry (Project)	
4.1	No. of Meetings		Date Attendance	
5	SITES AND BUILDINGS DATABASE		Summary	
5.1	Monthly Site Visits	106		
5.2	Total Listings	393		
5.3	Square Footage of Available Buildings	20,000,000+ SF		
5.4	Total Acreage Listed	31,415+ SF		
6	BUSINESS INCUBATOR (QUARTERLY)		Demographics Name of graduate and new business location.	5 Incubator Partners are Women Owned Businesses 2 Incubator Partners are Veteran Owned Businesses 1 Incubator Partner is Minority Owned
6.1	Incubator Registry	14 Incubator Partners		
6.2	Occupancy Percentage	78%		
6.3	Demographics Summary (% minority owned)	See Notes		
6.4	Graduates (3 per year)	None for May		



MEASURE		PERFORMANCE	WRITTEN REPORT	
7	BUSINESS ASSISTANCE AND FASTRAC COHORTS		Industries - First-Time Assistance Industries - Continued Assistance Training Summary	
7.1	First-Time Assistance Provided	18		
7.2	Continued Assistance Provided	6		
7.3	Fastrac Training Held	4		
7.4	Fastrac Participants from or starting in Target Areas	15		
7.5	NEXTworking -Students (300)			
7.6	NEXTworking -Businesses (35)			
8	DOWNTOWN AND MIDTOWN ACTIVITIES		Industries Type of Assistance: Location (#) Operational (#) Financial (#) Planning (#)	
8.1	Downtown and Midtown Business Assistance	14		
9	FLORIDA COMMERCE		Summary	No project RFI's came from Florida Commerce this month.
9.1	Communication	0		
10	FINANCIAL REPORT- QUARTERLY (PARAGRAPH 2.14)			Job Creation team: Heather Shubirg, Bart Rowland, Bryce Morrison, Erin Jones, and Beth McCall This team works with existing businesses and potential newcomers to remove any barriers to growth. Business Creation team: Evelyn Reyes, Jessica Michel, Freddie Morris, Norman Velasquez Alvares This team works with entrepreneurs to educate, advocate, and guide them through all stages of business creation and growth.
10.1	No. of Employees assigned to Ocala Services	8		

BUSINESS CREATION, RETENTION, AND ATTRACTION SERVICES AGREEMENT

MONTHLY REPORT: June 2025

MEASURE		PERFORMANCE	WRITTEN REPORT	
1	PROSPECT VISITS WITHIN FOCUS AREAS		Industries	Project Drive – existing manufacturer thinking about expanding. Facilitated meeting with InSite Real Estate and Space Florida to discuss the financial tools SF can offer. Great
1.1	Ocala Prospect Visits (10)	5	Summary	
2	AIRPORT PARK, AIRPORT PROPER, AND/OR ADJOINING PROPERTIES		Industries	
2.1	Prospect Visits (3)	2	Summary	
2.3	Acres Sold or Leased (Vacant Property)			
2.4	Capital Investment			
2.5	Square Footage Sold or Leased (Existing Buildings)			
3	MARKETING & BUSINESS RETENTION		Industries	Project Drain meetings and facilitated meetings with local machine shop. Potentially moving manufacturing from Canada to Ocala.
3.1	New Contacts Established		Summary	
3.2	Leads Generated			
3.3	Targeted Marketing Campaigns (5)			
3.4	Business Retention Calls	19		

MEASURE		PERFORMANCE	WRITTEN REPORT	
4	FINANCIAL REVIEW COMMITTEE (QUARTERLY)		Industry (Project)	
4.1	No. of Meetings		Date Attendance	
5	SITES AND BUILDINGS DATABASE		Summary	
5.1	Monthly Site Visits	75		
5.2	Total Listings	396		
5.3	Square Footage of Available Buildings	20,000,000+ SF		
5.4	Total Acreage Listed	31,415+ Acres		
6	BUSINESS INCUBATOR (QUARTERLY)		Demographics Name of graduate and new business location.	5 Incubator Partners are Women Owned Businesses 2 Incubator Partners are Veteran Owned Businesses 1 Incubator Partner is Minority Owned
6.1	Incubator Registry	14 Incubator Partners		
6.2	Occupancy Percentage	78%		
6.3	Demographics Summary (% minority owned)	See Notes		
6.4	Graduates (3 per year)	None for June		



MEASURE		PERFORMANCE	WRITTEN REPORT	
7	BUSINESS ASSISTANCE AND FASTRAC COHORTS		Industries - First-Time Assistance Industries - Continued Assistance Training Summary	
7.1	First-Time Assistance Provided	12		
7.2	Continued Assistance Provided	9		
7.3	Fastrac Training Held	1		
7.4	Fastrac Participants from or starting in Target Areas	15		
7.5	NEXTworking -Students (300)			
7.6	NEXTworking -Businesses (35)			
8	DOWNTOWN AND MIDTOWN ACTIVITIES		Industries Type of Assistance: Location (#) Operational (#) Financial (#) Planning (#)	
8.1	Downtown and Midtown Business Assistance	14		
9	FLORIDA COMMERCE		Summary	Project Vertigo request from Commerce.
9.1	Communication	1		
10	FINANCIAL REPORT- QUARTERLY (PARAGRAPH 2.14)		Employee and summary of activities.	Job Creation team: Heather Shubirg, Bart Rowland, Bryce Morrison, Erin Jones and Beth McCall This team works with existing businesses and potential newcomers to remove any barriers to growth. Business Creation team: Evelyn Reyes, Jessica Michel, Freddie Morris, Norman Velasquez Alvares This team works with entrepreneurs to educate, advocate, and guide them through all stages of business creation and growth.
10.1	No. of Employees assigned to Ocala Services	8		



BUSINESS CREATION, RETENTION, AND ATTRACTION SERVICES AGREEMENT

MONTHLY REPORT: July 2025

MEASURE

PERFORMANCE

WRITTEN REPORT

1 PROSPECT VISITS WITHIN FOCUS AREAS

Industrie
s

Development Company representing Landowner, looking to expand project.

Commercial Life science

Summary
y

CCPI, new development lead, looking at opportunity in Ocala.

1.1 Ocala Prospect Visits (10)

2

2 AIRPORT PARK, AIRPORT PROPER, AND/OR ADJOINING PROPERTIES

Industries
Summary

Insite
Property

Project Meeting by Quebec Aviation/Aerospace Rep on opportunities

Aerospace and Aviation rep for Haskell out of JAX, connected on opportunities for site

Prospect Visits (3)

2

2.3 Acres Sold or Leased (Vacant Property)

2.4 Capital Investment

2.5 Square Footage Sold or Leased (Existing Buildings)

3 MARKETING & BUSINESS RETENTION

Industrie
s

LinkedIn Posts share our target industries Decks. Aviation/Aerospace, Manufacturing, Life Science. Targeting Attraction and external visibility

Summary

Attended Duke Energy, Energy 101 Class. With Fellow Utility Providers, EDC colleagues, Site Selectors

3.1 New Contacts Established

2

3.2 Leads Generated



3.3	Targeted Marketing Campaigns (5)	2	y	
3.4	Business Retention Calls	5		



MEASURE		PERFORMANCE	WRITTEN REPORT	
4	FINANCIAL REVIEW COMMITTEE (QUARTERLY)		Industry (Project)	Aviation – Hangar Space – 7/9/2025/ Jason Pittman, Angie Clifton, Brian Cretul, Loren Thrasher, Amanda Miller, Jeremy Jacobs, Wally Harriss, Vicki Listebarger; Presenters - Davis Dinkins; Michael Robinson; Staff - Heather Shubirg
4.1	No. of Meetings	1	Date	
			Attendance	
5	SITES AND BUILDINGS DATABASE		Summary	
5.1	Monthly Site Visits	75		
5.2	Total Listings	406		
5.3	Square Footage of Available Buildings	20,000,000+ SF		
5.4	Total Acreage Listed	31,415+ Acres		
6	BUSINESS INCUBATOR (QUARTERLY)		Demographics	3 Incubator Partners are Women Owned Businesses 1 Incubator Partners are Veteran Owned Businesses 2 Incubator Partner is Minority Owned Newest PPBI Partner: WVV Wifi
6.1	Incubator Registry	13 Incubator Partners	Name of graduate and new business location.	
6.2	Occupancy Percentage	84%		
6.3	Demographics Summary (% minority owned)			
6.4	Graduates (3 per year)	Art, Song and Story Palace		



MEASURE		PERFORMANCE	WRITTEN REPORT	
7	BUSINESS ASSISTANCE AND FASTRAC COHORTS		Industries - First-Time Assistance Industries - Continued Assistance Training Summary	Started 2 nd Cohort of FastTrac with 4 classes held. Have 22 entrepreneurs in 2 nd class. Topics of classes include Intro to entrepreneurship, Business planning, Market Research, business financials, and business model design.
7.1	First-Time Assistance Provided	12		
7.2	Continued Assistance Provided	6		
7.3	Fastrac Training Held	4		
7.4	Fastrac Participants from or starting in Target Areas	22		
7.5	NEXTworking -Students (300)			
7.6	NEXTworking -Businesses (35)			
8	DOWNTOWN AND MIDTOWN ACTIVITIES		Industries Type of Assistance: Location (#) Operational (#) Financial (#) Planning (#)	
8.1	Downtown and Midtown Business Assistance	18		
9	FLORIDA COMMERCE		Summary	Submitted 2 RFI's for Project Sink and Project Vertigo
9.1	Communication	2		
10	FINANCIAL REPORT- QUARTERLY (PARAGRAPH 2.14)		Employee and summary of activities.	Job Creation team: Heather Shubirg, Bryce Morrison, Erin Jones and Beth McCall This team works with existing businesses and potential newcomers to remove any barriers to growth. Business Creation team: Evelyn Reyes, Jessica Michel, Freddie Morris, Norman Velasquez Alvares This team works with entrepreneurs to educate, advocate, and guide them through all stages of business creation and growth.
10.1	No. of Employees assigned to Ocala Services	8		



BUSINESS CREATION, RETENTION, AND ATTRACTION SERVICES AGREEMENT

MONTHLY REPORT: August 2025

MEASURE		PERFORMANCE	WRITTEN REPORT	
1	PROSPECT VISITS WITHIN FOCUS AREAS		Industries	
1.1	Ocala Prospect Visits (10)	2	Summary	We had business development meeting with Duke Energy. Toured Ocala Airport. Aviation and manufacturing related discussions. Met with restaurant company about downtown.
2	AIRPORT PARK, AIRPORT PROPER, AND/OR ADJOINING PROPERTIES			We had business development meeting with Duke Energy. Toured Ocala Airport. Aviation and manufacturing related discussions. Met with restaurant company about downtown.
2.1	Prospect Visits (3)	1		
2.3	Acres Sold or Leased (Vacant Property)	N/A		
2.4	Capital Investment	N/A		
2.5	Square Footage Sold or Leased (Existing Buildings)	N/A		
3	MARKETING & BUSINESS RETENTION		Industries	Restaurant called to inquire about downtown. Currently working with them.
3.1	New Contacts Established	5	Summary	LinkedIn posts sharing target industries overview within city. Promoted Lockheed contract
3.2	Leads Generated	1		Assisting Finyl Products with expansion retention and Outlaw SNAX
3.3	Targeted Marketing Campaigns (5)	3		Distribution project
3.4	Business Retention Calls	1		



MEASURE		PERFORMANCE	WRITTEN REPORT	
4	FINANCIAL REVIEW COMMITTEE (QUARTERLY)		Industry (Project)	No FRC Requests this month.
4.1	No. of Meetings	N/A	Date Attendance	
5	SITES AND BUILDINGS DATABASE		Summary	Removed 12 duplicated listings this month resulting in 443 sites and building total.
5.1	Monthly Site Visits	60		
5.2	Total Listings	443		
5.3	Square Footage of Available Buildings	34,582,738		
5.4	Total Acreage Listed	31,475		
6	BUSINESS INCUBATOR (QUARTERLY)		Demogra phics Name of graduate and new business location.	5 Inc tor Partners are Women Owned 1 Incubator Partner is Veteran Owned 2 Incubator Partners are Minority Owned Newest PPBI Partner: H.E.R.O Mental Health
6.1	Incubator Registry	15 Incubator Partners		
6.2	Occupancy Percentage	94%		
6.3	Demographics Summary (% minority owned)			
6.4	Graduates (3 per year)	Funky Unicorn – April 2025 – Art Song and Story Palace – July 2025		



MEASURE		PERFORMANCE	WRITTEN REPORT	
7	BUSINESS ASSISTANCE AND FASTRAC COHORTS		Industries - First-Time Assistance Industries - Continued Assistance Training Summary	August we held 4 trainings for FastTrac at Mary Sue Rich Center, with topics including managing Cash Flow, vendor relations, financial Mangement cycles, and SCORE/SBDC Resources.
7.1	First-Time Assistance Provided	7		NEXTworking Healthcare- 150 students and 35 business attended. NEXTworking Industrial and Ag in October.
7.2	Continued Assistance Provided	14		
7.3	Fastrac Training Held	4		
7.4	Fastrac Participants from or starting in Target Areas	22		
7.5	NEXTworking -Students (300)	150		
7.6	NEXTworking -Businesses (35)	35		
8	DOWNTOWN AND MIDTOWN ACTIVITIES		Industries Type of Assistance: Location (#) Operational (#) Financial (#) Planning (#)	Met with restaurant company considering Ocala Downtown
8.1	Downtown and Midtown Business Assistance	1		
9	FLORIDA COMMERCE		Summary	Received and submitted 3 RFI's from Florida Commerce this month. All 3 submissions featured the Insite property at Ocala International Airport.
9.1	Communication	3		
10	FINANCIAL REPORT- QUARTERLY (PARAGRAPH 2.14)		Employee and summary of activities.	Job Creation team: Heather Shubirg, Bryce Morrison, Erin Jones and Beth McCall This team works with existing businesses and potential newcomers to remove any barriers to growth.
10.1	No. of Employees assigned to Ocala Services	8		Business Creation team: Evelyn Reyes, Jessica Michel, Freddie Morris, Norman Velasquez Alvares This team works with entrepreneurs to educate, advocate, and guide them through all stages of business creation and growth.



BUSINESS CREATION, RETENTION, AND ATTRACTION SERVICES AGREEMENT

MONTHLY REPORT: September 2025

MEASURE		PERFORMANCE	WRITTEN REPORT	
1	PROSPECT VISITS WITHIN FOCUS AREAS		Industries	Virtual FAM tour with national consultants. Reviewed sites in Ocala/Marion. Heavy emphasis on OCF.
1.1	Ocala Prospect Visits (10)	1	Summary	
2	AIRPORT PARK, AIRPORT PROPER, AND/OR ADJOINING PROPERTIES		Industries	Virtual FAM tour with national consultants. Reviewed sites in Ocala/Marion. Heavy emphasis on OCF.
2.1	Prospect Visits (3)	1	Summary: Virtual	
2.3	Acres Sold or Leased (Vacant Property)		FAM tour of OCF	
2.4	Capital Investment		with industrial site	
2.5	Square Footage Sold or Leased (Existing Buildings)		consultant.	
3	MARKETING & BUSINESS RETENTION		Industries	3.3: Shared update & welcome of new CEO to contacts on LinkedIn.
3.1	New Contacts Established		Summary	
3.2	Leads Generated			
3.3	Targeted Marketing Campaigns (5)	1		
3.4	Business Retention Calls			

MEASURE		PERFORMANCE	WRITTEN REPORT	
4	FINANCIAL REVIEW COMMITTEE (QUARTERLY)		Industry (Project)	FRC Held for Affordable Housing Project on 9/16/2025 with 3 banks in attendance.
4.1	No. of Meetings	1	Date Attendance	
5	SITES AND BUILDINGS DATABASE		Summary	Site visits remain consistent, no longer showing duplicated listings. Working with city to identify and promote catalyst sites.
5.1	Monthly Site Visits	51		
5.2	Total Listings	470		
5.3	Square Footage of Available Buildings	35,817,880		
5.4	Total Acreage Listed	1,451.4		
6	BUSINESS INCUBATOR (QUARTERLY)		Demographics Name of graduate and new business location	5 Incubator Partners are Women Owned 1 Incubator Partner is Veteran Owned 2 Incubator Partners are Minority Owned Newest PPBI Partner: H.E.R.O Mental Health Funky Unicorn – April 2025 – Art Song and Story Palace – July 2025
6.1	Incubator Registry	15 Incubator Partners		
6.2	Occupancy Percentage	94%		
6.3	Demographics Summary (% minority owned)	See notes		
6.4	Graduates (3 per year)	Funky Unicorn – April 2025 – Art Song and		



MEASURE		PERFORMANCE	WRITTEN REPORT	
7	BUSINESS ASSISTANCE AND FASTRAC COHORTS		Industries - First-Time Assistance Industries - Continued Assistance Training Summary	Finished our Second FastTrac Cohort with our last two remaining topics, Leadership and company culture, and Business Partnership/incorporation. We graduated 22 businesses on September 10 th – with Kauffman representatives coming to celebrate at our graduation ceremony
7.1	First-Time Assistance Provided			NEXTworking Healthcare- 150 students at CFC. NEXTworking Industrial and Ag in October
7.2	Continued Assistance Provided			
7.3	Fastrac Training Held	4		
7.4	Fastrac Participants from or starting in Target Areas	22		
7.5	NEXTworking -Students (300)	150		
7.6	NEXTworking -Businesses (35)			
8	DOWNTOWN AND MIDTOWN ACTIVITIES		Industries Type of Assistance: Location (#) Operational (#) Financial (#) Planning (#)	Working with city to identify and promote catalyst & CRA site opportunities in Downtown.
8.1	Downtown and Midtown Business Assistance	3		2 distribution projects in city limits nearing completion.
9	FLORIDA COMMERCE		Summary	Heather is going to Florida Commerce – all the leads are coming to Marion 😊
9.1	Communication	2		Submitted for 2 projects, Pipeline (biofuel production) & Coconut (manufacturing). Submitted OCF for both.
10	FINANCIAL REPORT- QUARTERLY (PARAGRAPH 2.14)		Employee and summary of activities.	Job Creation team: Heather Shubirg, Bryce Morrison, Erin Jones and Beth McCall This team works with existing businesses and potential newcomers to remove any barriers to growth.
10.1	No. of Employees assigned to Ocala Services	8		Business Creation team: Evelyn Reyes, Jessica Michel, Freddie Morris, Norman Velasquez Alvares This team works with entrepreneurs to educate, advocate, and guide them through all stages of business creation and growth.