

TBD

Director of
Business
Advocacy

Business Advocacy

Inter-City Visit > Established a task force to incorporate and apply the successful strategies we observed in Savannah into our own practices in Ocala.

Attended (4) Government Meetings or Workshops: No live meetings attended in October

Host Quarterly Workshops / Roundtables on Business Issues: Hosted Childcare Tax Credit Roundtable October 16th with assistance from Old Florida Partners. Speakers included Representative Stan McClain, Jennifer Ensley with Department of Revenue, and Madeleine Thakur with the Children's Movement. Resources have been placed on the CEP's Business Advocacy page.

Community
Updates
and
Citizens
Encouraging
Progress, Inc.
(CEPI) Updates

Local & Legislative

Comprehensive Campaign for 1 Penny Renewal & 1/2 Penny School Sales Surtax underway including>>>

Digital Advertising: Vote-by-Mail (Social Media, Google Display Network, OTT); Digital Advertising - Early Voting & Election Day: (Social Media, Google Display Network, OTT); Network TV (WKMG, news only); Video Production (2 sets of videos (4 total), each incl. a 15 and 30-sec version; on-the-ground filming); Cable TV (CNN & The Weather Channel); and Text Messages. Partners are continuing to host Kevin Sheilley for conversations with their staff. CEP has done local radio segments, Papa Johns placing flyers with info on the sales tax on pizza boxes through November 4th, another partner has made their popular podcast available to us for 5 weeks with speakers to include the Sheriff, Mayor, and Commission Chair are scheduled, working on the Superintendent, with Kevin taking the last spot. Our Weekly Buzz videocast highlighted the ½ penny on the September 6th episode highlighting the severe maintenance needs. A Closer Look video segments have been done on the penny & half penny. Kevin continues an extensive schedule of speaking engagements around the community.

Director of Advocacy tendered her immediate resignation from the CEP on September 17th.



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Our team attended an event in Orlando to promote the InSite development at OIA to industrial brokers from across the SE US. More than 30 attendees. InSite is planning a similar event for Tampa in late 2024.

The next Inside Industry Ocala is being planned for mid-January. This networking event brings Ocala's manufacturing and logistics sectors together to share best practices and build new relationships. This event will be held at R+L Global Logistics and sponsored by Ameris Bank.

Project Virgo has taken a step forward. We met with the end user, the developer, and municipality to discuss the project. This competitive manufacturing project would create a large number of jobs and capital investment.

Project Bananas Foster continues to move closer the end zone. Several hurdles to cross before this huge project is considered complete. It is encouraging to see local stakeholders working together to make this project a success.

Project Flower received SUP approval from Marion County and now moves to lease negotiations. This project will be transformative for the selected area of the Ocala Metro.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Attended Insite Group Event in Orlando with the JC Team, to connect on their Ocala Airport property and opportunities.

BioFlorida Meeting for upcoming annual meeting with SVP and local company interested in showcasing. Looking ahead for Opportunities to host with that company in Ocala.

US Embassy Trade Specialist follow up for Ocala AgraBusiness Connection for Project with Canadian company. In process.

Completed CEP Partner requested Letters of Support for the Hospice CON.

CEP Healthcare Insider Kick off Lunch hosted by WEC set for late January 2025. Bringing together healthcare leaders, education partners, legislative liaisons and outside life science partners.



**Bryce
Morrison**

Director of
Business
Development

Business Development

LLH had 2,051 webvisits.

We did not submit any RFI's this month.

I did not attend any conferences or tradeshows this month.

Attended Insite networking event for Airport Property. Several meeting with Insite discussing marketing. Duke presented about Data Centers and site identification/preparation.

Updated Sites & Buildings as necessary.



Evelyn
Reyes

VP, Business
Creation

Business Creation &
Hispanic Engagement

"Hablemos De Negocios" Monthly Business Spanish Workshop sponsored by and at Roberts Funeral Home- 200.

Attended " Cumbre De La Mujer" Conference in Orlando. Over 100 business women in attendance.

Disburse the first four OMCN NANO Loans to Ocala business owners.

BC Team completed our POW.

8 Incubator Partners have completed their business plans and now will be working on their 3 year projections.



Dean
Blinkhorn
COO/Director Of
Talent

Networks
(Talent Development)

Construction Academy Meeting: none scheduled.

Primary Contact Meetings: NEXTworking prep meeting with Jennifer Fryns on 10/2, NEXTworking brainstorming with Kathy Otte on 10/17, lunch with Gary Smallridge on 10/22, met with Cory Weaver from CSCLM on 10/30.

Assist Youth Business Plan Competition: nothing scheduled.

NEXTworking: Ag & Equine Studies at CF's Vinatge Farm: 100 students, 25 industry experts.

Attended IMPACT meetig at the PPBI on 10/3, distributed school hurricane supplies fot the PEFMC on 10/8, attended Business After Hours on 10/17, coffee with Doug Engle on 10/18, PEFMC Board Meeting on 10/22, Ira Holmes classroom dedication at CF on 10/29, ACCE CCE info session on 10/30, "Thank A Teacher" surprise visit at LWHS on 10/31.



Jessica
Michel

Director of
Business
Creation

Power Plant Incubator

PPBI Occupancy: 87.5%. SCORE & SBDC office weekly. Started a co-working office with 6 desks. 2 office spaces available (110, 107). SCORE has dedicated office in 109

~~Professional Development: Attended InBIA Ecosystem Forum in Kansas City - connected with over 100 ESC orgs. Learned about additional funding opportunities.~~

Professional Development: InBIA's Entrepreneurship Center Management (ECM) Certificate Program - finished 3rd class and will finish final in November and become ECM Certified

Content Creation: Updated OMCF logo - finalized two more PPBI Partner Canvas prints. Working on PPBI IMPACT Sheet. PPBI Booklet-ongoing

Programming: 1MC Ocala averages 56 attendees this month. Weekly Power Hour with PPBI Partners. We started weekly Partner Presentations for Power Hour.. 1st Power Partner roundtable sceduled for November. Maryann Kilgallon is our presenter.

Total Jobs Created at the PPBI: 700 Total Graduate in 2024 - 4



Director of
Entrepreneurship
Services

2nd Stage Businesses

Created (3) video spotlights highlighting Women Power Plant Business Partners for Women's Small Biz Month

Completed the self paced ICE HOUSE Course and began the facilitator course with Monty of the LEAD team

Began planning Youth Business Comp. (Created a new logo and a Flyer)

Finalized schedule for POW 2025

Condcuted Entrepreneur in Residentce (EIR) and had over 15 participants in the Power Plant



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Marion County, City of Ocala, Pyranha, Reveille, Douglas Law Firm, Ameris Bank, Campus USA, Citizens First Bank, Encompass Health, DeLuca Toyota, Roberts of Ocala, HCA Florida Ocala Hospital, College of Central Florida, Florida Express Waste & Recycling, James Moore & Co, Courtyard by Marriott, Benmar Construction, CareerSource, Miller & Sons Plumbing.

Executive Partner Events (10/yr): The Biannual Chairman's Lunch Oct. 23rd with 61 in attendance. The next Executive Roundtable Lunch will be Nov. 6th, followed by the next CEO Network Reception in early December.

Executive Tier Introductions: Scott Siemens/Estella Byrd Whitman, The Ocalan/DeLuca Toyota, The Ocalan/18 South, Reveille/Adena, Jumbolair/AdventHealth, Reveille/Jumbolair.

Sponsorships (\$260K/yr): Brookdale Chambrel Pinecastle (Nov. BAH), Larsen Hay (Equine Expo), Florida Express Waste & Recycling (CEP Weekly Buzz), Florida Express Waste & Recycling (CEP LinkedIn page).

CEP 101s (200 attend./yr): We had 6 on hand.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > October 1 - Mindfulness with Amy Robertsm RBOI (20 CEP partners)

Friday Talks > October 25: Free Resources from the MC Public Library (4 CEP partners)

Leadership Ocala Marion (LOM) > October 22: Local Government - OEU, County and City Governments (36 partners)

Leadership Ocala Marion Youth (LOMY) > October 7: Community Session at MSS (38 students)

exCEptional Mornings > October 16: State of the City with Pete Lee (352 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

OCEP Partner Events (10/mo): 9 ribbon cutting events

Business After Hours (400/month): 4000 attendees at Business After Hours Deluca

Other CEP Events (150/mo): approximately 180 attendees at partner events MBA, President's Luncheon, CEP 201, Networks Meetings; 70 attendees at Evento de Networking

BCEP BAH/BotR (300/mo): BotR 90 attendees, BBAH 200

BCEP Other events (5/mo): 0



Chris
Blakenship
Partner Relations
Associate

Partner Sales

New Partner Sales: 18 @ \$23,900

Cold Calls: 151

New Partner Meetings: 28

End of First Year Renewals: 9 @ \$4925

Partner Upgrades: 1 @ \$1200



Ron Hipner
Partner Relations
Associate

Partner Sales

New Partner Sales: 1

Cold Calls: 2

New Partner Meetings: 1

End of First Year Renewals:



Matt
Wilkerson
Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 26 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 32 in-depth calls

Partner Videos (8/mo): 21 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list.



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners: 1

BCEP Cold Calls: 32

BCEP New Partner Meetings: 4

BCEP Sponsorship: \$0

BCEP Partner Upgrades: none



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 88 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 5 partners retained from 60-90+ days past due

Partner Upgrades & Value: **Renewal Primary Care:** Business-->Premium=\$1200
and WSKY FM: Business-->Legacy Trustee = \$2500

WKTK FM

Partner Events (Scheduling & posting): 48



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Initiative Meeting, presented by Pyranha, was held at the CEP Boardroom with 42 partners present with refreshments provided by Ocala Dog Ranch and we joined the pinning of the new OPD Mounted Unit at Citizen's Circle. .

Equine 101 & 201: N/A

Farm/Venue/School Visit: Diamonds Oaks Farm, Trail Riding and B and B , CF Vinatge Farm

Equine Events and Community Meetings: Ceremony for pinning of the Mounted Unit with Chief Balken, OBS Yearling Sale, CEP Equine/Ag Nextworking, Iberian Showcase

Equine Industry Promotion: Wrote the equine enewsletter and wrote the Everything Equine section for Ocala Magazine. Assited with promoting the Iberian Showcase bringing horses and equestrians from all over the world.



Kimberly
Langley

Executive
Assistant

Finance & Administration

Past Due Outreach - 34

Verify All New Partners Billing: October 2024

Pull Renewal Report - October 2024

Pay All Open Invoices Weekly - October 2024



Donna
Marseco

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

Relocation guide packets sent within two weeks of receipt via phone or email

Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges (Weekly Basis) (50)

Resolve Partner Billing Discrepancies (Weekly Basis) (50)

Verify that all bills recorded in the accounting software have an invoice/support (Weekly Basis) (50)

Record credit card charges (Weekly Basis) (50)

Operational Meetings - Meet with Dean 4 times



Jessica Gilbert
VP Foundation
for CEP

Foundation

Grant Funding: 10k approved (pending receipt) (TD Bank) - \$5000 Papa Johns Grant (LOMY)

Applications pending: PNC (\$15,000), FL Blue (\$50,000)

Ended 2023 with total Foundation income of \$298,204.

The Catalyst had 35 downloads/views between all channels including YouTube. New episodes to premiere in September: Levonda Goodson



Sullivan
Hogan
Director of Video

Communications

Weekly Buzz Views: There were 5558 for episodes 284 - 287 over doubling our stretch goal average of around 2650 views per month, with episode 286 notably reaching over 1.1K views.

CEP on the Scene Views: There 525 views for CEP on the Scene this month, although notably the episode had only been posted four days before this number was taken

POV Ocala Views: There were 2089 views for episodes 65 & 66, spread evenly across platforms.

Irregular Series Views (Closer Look, Leading): The repost of A Closer Look gained 1147 views this month

Additional Internal Videos: N/A

Director of Social
Media &
Marketing

Communications

New Facebook Followers: 67 new monthly followers | 13k total followers

FACEBOOK Post Reach: 16,700 | Engagement: 6,023 | Top posts were Ribbon Cuttings: Smalls Sliders- 9.5k, 18 South Sports Bar-4.6k, Grave Hot Dogs and Beer-1.9k, Cogent Bank-1.5k, Friday Talks (1601), Tuesday Talks (2104), EM Flyer (2442), EM Photos (107), BAH Flyer (1456), BAH Photos (773), Weekly Buzz (ep 280 -283 -2000), CEP On The Scene (504), POV (2178), Belleview- BOTR/BBAH (2215), Equine Expo (1500), Podcast (720). Slightly lower post reach this month due to Summer and less RC events. Engagement still remains at average.

FACEBOOK Group Reach: 8,573 | **INSTAGRAM Reach:** 7731 (CEP), 1492 (ODM), 88 (Equine), 678 (BelleviewCEP)

Email Blast Open Rate: Number of people opening email blasts are at 29,137 - click rate 1665

CEP Website Visits: Number of people visiting the CEP website are at an overall increase from prior months due to event registrations, partner event submissions to calendar, and additional registration link clicks shared through our social media platforms

LinkedIn Followers & Post Impressions: 4,003 organic impressions with 30 new followers at 3,075 total. LinkedIn views continue to increase due to more frequent posts and our video series. Starting in 2024, LinkedIn stats will be shared with Bryce and Bart.



October
2024



Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2024 FB 22,446 and IG 2,798 : Jan FB 22,855 +409 , IG 2,949 + 151, Feb FB 23,849= +994 IG 3,109 = +311, March 24,346= +497 IG 3183= +74, April 24,816 =+470, IG 3,296=+113 May 24,914 =+98, IG 3,355=+59, June 25,030=+116, IG 3401=+46, July 25,171= +141 IG 3504=+103

Market Vendors (336/mo): Jan 332, Feb 376, March 462, April 408, May 417, June 402, July 341, Aug 462, Sept 411, Oct 407

36 Pavillion Rentals for the year: Jan 6, Feb 4, March 4, April 5, May 4, June 4, July 3, Aug. 1, Sept 7, Oct 6

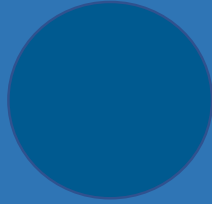
12 Self-generated ODM events: Jan 0, Feb 1, March 1, April 1, May 0, June 1, July 0, Aug. 0, Sept 0, Oct 0

Provide 2 Vendor Workshops a Year:



TBD

[illegible]



TBD

Director of
Business
Advocacy

Business Advocacy

Inter-City Visit > Established a task force to incorporate and apply the successful strategies we observed in Savannah into our own practices in Ocala.

Attended (4) Government Meetings or Workshops: Two meetings attended in November

Host Quarterly Workshops / Roundtables on Business Issues: One for November

Community
Updates
and
Citizens
Encouraging
Progress, Inc.
(CEPI) Updates

Local & Legislative

Comprehensive Campaign for 1 Penny Renewal & 1/2 Penny School Sales Surtax:

Congratulations to the Board and Business Community! The 20-year extension of the Sales Surtax passed with over 62% voting yes and The half-penny 10-year School Capital Outlay Sales Surtax passed with nearly 60% voting yes. Both taxes won every voting precinct.

The Marion County Legislative Delegation Lunch and Hearings for the 2025 Legislative Session will be held on January 8, 2025 at CF. More details to follow in December.

Director of Advocacy position will remain open through the Spring of 2025



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Ocala hosted the Florida Rural Economic Development Summit at the World Equestrian Center. More than 400 guests attended this annual event to discuss ED topics, best practices, challenges, successes, and meet with developers, utility providers, and state officials.

The next Inside Industry Ocala is being planned for mid-January. This networking event brings Ocala's manufacturing and logistics sectors together to share best practices and build new relationships. This event will be held at R+L Global Logistics and sponsored by Ameris Bank.

Project Virgo has taken a step forward. We met with the end user, the developer, and municipality to discuss the project. This competitive manufacturing project would create a large number of jobs and capital investment.

Project Bananas Foster continues to move closer the end zone. Several hurdles to cross before this huge project is considered complete. It is encouraging to see local stakeholders working together to make this project a success.

I attended a Florida Economic Development Council Professional Development Training at R&L Global Logistics. Great opportunity to connect colleagues and counterparts to one of Ocala's largest employers.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Attended the Annual BioFlorida Innovation Conference with over 500 attendees. Fantastic Connections, looking at regional opportunities. Artemis Plastics CEO Gary Mishkin also attended. Lead generation and continued relationship building with BioQuebec.

Attended the FREDa Conference. Great collaborative energy from a regional perspective on growth. Local support for the growth was a key take away.

Hosted CEP Healthcare Insider 4th quarter meeting. Great engagement amongst our healthcare partners for the end of year wrap up.

CEP Life Science Flex Space discussions continue to expand with education and local partners.

Attended the Legislative Session committee meeting at BioFlorida on 11/20. Looking ahead to new funding, legislation and opportunities. Bringing this to the Legislative session for the Healthcare Council committee session with state and local representatives in Q1 of 2025.



Bryce
Morrison

Director of
Business
Development

Business Development

LLH had 1,097 Visit this month.

We submitted 1 RFI this month, Project Snare which is an Aerospace/Aviation company looking to expand. We resubmitted Baseline Commerce Park to the free LASSO program from Global Location Strategies.

Attended the FREDa Conference held at World Equestrian Center. Spoke with several partners through-out the state and discussed ongoing projects.

Meeting with airport director about Project Snare, several meetings with SelectFlorida related to Project Snare. Several discussions with Duke Energy surrounding infrastructure improvements and current sites.

Updated Sites & Buildings as necessary.



Evelyn
Reyes

VP, Business
Creation

Business Creation &
Hispanic Engagement

OMCF was awarded \$300,000 for TA from the U.S. Department of the Treasury's CDFI Fund to Expand Access to Capital in Underserved Communities

PPBI Celebrated our grand opening and ribbon cutting on Nov 13, 2025.

Completed the IMPACT Construction Academy, with a series of 3 sessions with over 150 entrepreneurs in attendance.

Attended the FEDC Nov. Membership Meeting & Networking Luncheon.

Attended the 2024 FREDA Rural Summit at the World Equestrian Center.



Blinkhorn
COO/Director Of
Talent

Networks
(Talent Development)

Construction Academy Meeting: none scheduled

Primary Contact Meetings: none scheduled.

Assist Youth Business Plan Competition: Attended on 11/6, along with two other CEP team members who sat at the student/industry roundtables.

NEXTworking: none scheduled.

Other: After-hours Fund Development meeting for the PEFMC on 11/4, Executive Roundtable Lunch at the Reilly on 11/6, after-hours IMPACT meeting at the PPBI on 11/7, PEFMC Board Meeting on 11/19, Rural Summit at WEC on 11/21, Business After Hours on 11/21.



Jessica
Michel

Director of
Business
Creation

Power Plant Incubator

PPBI Occupancy: 87.5%. SCORE & SBDC office weekly. Started a co-working office with 6 desks. 2 office spaces available (110, 107). SCORE has dedicated office Space in 109. Market Ventures moving into additional Conference Space.

Professional Development: InBIA's Entrepreneurship Center Management (ECM) Certificate Program - completed

Content Creation: Completed IMPACT Sheet. Completed 4 page PPBI Booklet

Programming: Power Partner Exchange - Hosted 1st meeting with Maryann Killgallon. 12 Partners and Graduates in Attendance. Power Plant Open House - November 13th

Total Jobs Created at the PPBI: 715 Total Graduate in 2024 - 4



Director of
Entrepreneurship
Services

2nd Stage Businesses

Completed PPBI Intro video that covers our programs and services

Became Certified as a Facilitator for the Entrepreneurial Learning Initiative (eli) ICE HOUSE Program

Conducted Power Plant Business Incubator Ribbon Cutting

Became Certified as an official 1 Million Cups Organizer through the Kauffman foundation

Conducted Entrepreneur in Residence (EIR) and had 19 participants in the Power Plant



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): SMA, Empath, Coca-Cola, Roberts of Ocala, Pyramma, Cumison-Wright, Seacoast Bank, Signature Brands, Dollar Tree, PNC Bank, Ag-Pro, Pat Myers Electric, All Dry Services, Arthur Fisher, Benmar Construction, Colomb Investment Management, Gallagher, HDG Legacy, James Moore, Grandview Clydesdales, Lennar Homes, Professional Realty, RoMac Building Supply, Stearns Weaver Miller

Executive Partner Events (10/yr): Our Executive Roundtable Lunch on Nov. 6th had 61 Upper-Tier Partners on hand. Our next CEO Network Reception in early December 3rd.

Executive Tier Introductions: Wiley Productions/Diversified Consulting Concepts, Signature Brands/Fenix Staffing, Dollar Tree/Fenix Staffing, James Moore/U-Dump Trailers, Ameris Bank/Florida Blue, The Vines Hospital/Florida Blue

Sponsorships (\$260K/yr): Panzer Concierge Medicine (Feb BAH), Zach West Law (Healthcare Insider), Citizens First Bank (2025 Annual Luncheon), Coll. of Central Florida (2025 Annual Luncheon).

CEP 101s (200 attend./yr): We will have a combined November/December CEP 101 on Dec. 4th.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > November 4 - DJ Ryan and Beverly Wilson Hospice of MC (17 CEP partners)

Friday Talks > November 22: PPBI Residents (8 CEP partners)

Leadership Ocala Marion (LOM) > November 12: Education Session - Ambleside, Hillcrest, MTI, Ina A Colen and PEFMC (36 partners)

Leadership Ocala Marion Youth (LOMY) > November 4: Justice Session with Greg Harrell, State Attorney, Judge Cotton (38 students)

exCEptional Mornings > November 20: Inc. 5000 nominees (299 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

OCEP Partner Events (10/mo): 8 ribbon cutting events

Business After Hours (400/month): 385 attendees at Business After Hours Brookdale

Other CEP Events (150/mo): approximately 80 attendees at partner events MBA, President's Luncheon, CEP 201, Networks Meetings; 70 attendees at Evento de Networking

BCEP BAH/BotR (300/mo): Belleview events Dec 3 and 5th for Holidays

BCEP Other events (5/mo): 0



Chris
Blakenship
Partner Relations
Associate

Partner Sales

New Partner Sales: 10 @ \$17,300

Cold Calls: 115

New Partner Meetings: 21

End of First Year Renewals: 4 @ \$4300

Partner Upgrades: 1 @ \$10,000



Ron Hipner
Partner Relations
Associate

Partner Sales

New Partner Sales: 0

Cold Calls:

New Partner Meetings: 1

End of First Year Renewals:



Matt
Wilkerson
Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 24 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 30 in-depth calls

Partner Videos (8/mo): 22 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list.



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners: 1

BCEP Cold Calls: 73

BCEP New Partner Meetings: 6

BCEP Sponsorship: \$0

BCEP Partner Upgrades: none



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 77 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 4 partners retained from 60-90+ days past due

Partner Upgrades & Value: 0

Partner Events (Scheduling & posting): 37



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: N/A.

Equine 101 & 201: N/A

Farm/Venue/School Visit: CC Bellandi Marchador Farm, new CT Wing Of Peterson Smith Equine Hosp. and Complete Care

Equine Events and Community Meetings: Attended the Breeders Cup World Championships, the Pyranha Life Golf and Gala Fundraiser, and the Horse Farms Forever Summit and organized and attended the Equine Industry Expo, All Breed Parade and Equestrian Games

Equine Industry Promotion: Wrote the equine newsletter and wrote the Everything Equine section for Ocala Magazine. Promoted the Ocala Marion County connections to the Breeders' Cup World Championships and promoted the equine industry through the Equine Industry Expo, All Breed Parade and Hobby Horse Equestrian Gamesy.



Kimberly
Langley

Executive
Assistant

Finance & Administration

Past Due Outreach - 40

Verify All New Partners Billing: Novmeber 2024

Pull Renewal Report - Novmeber 2024

Pay All Open Invoices Weekly - Novmeber 2024



Donna
Marseco

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

Relocation guide packets sent within two weeks of receipt via phone or email

Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges (Weekly Basis) (50)

Resolve Partner Billing Discrepancies (Weekly Basis) (50)

Verify that all bills recorded in the accounting software have an invoice/support (Weekly Basis) (50)

Record credit card charges (Weekly Basis) (50)

Operational Meetings - Meet with Dean 4 times



Jessica Gilbert
VP Foundation
for CEP

Foundation

Grant Funding: 10k approved (pending receipt) (TD Bank) - \$5000 Papa Johns Grant (LOMY)

Applications pending: PNC (\$15,000), FL Blue (\$50,000)

Ended 2023 with total Foundation income of \$298,204.

The Catalyst had 12 downloads/views between all channels including YouTube.



Sullivan
Hogan
Director of Video

Communications

Weekly Buzz Views: There were 4643 views for episodes 288 - 292 well exceeding our stretch goal average of around 2650 views per month, with episode 289 notably reaching over 1K views on LinkedIn.

CEP on the Scene Views: There were 1435 views for CEP on the Scene this month exceeding our stretch goal expected average and reaching over 1.2K view on Facebook alone.

POV Ocala Views: There were 5966 views for episodes 67 & 68, with episode 67 reaching nearly 5K views on LinkedIn, a new record for the series.

Irregular Series Views (Closer Look, Leading):

Additional Internal Videos: one call for presenters video for Andrea



Arin
Conrad
Director of
Communications &
Marketing

Communications

New Facebook Followers: 115 new monthly followers | 13,148 total followers

FACEBOOK Post Reach: 38,000 | **Engagement:** 1,600 | **Top posts:** Culver's Groundbreaking-22K, Refuge of Hope-2.7K, Live 2 Lead Pics-2.3K, Roberts of Ocala-2.1K, Coke Florida Grand Opening-1.9K, BAH Photos-1.8K, Douglas Law Firm-1.8K, Throwback Thursday BAH-1.2K, Restaurant Depot Ribbon Cutting-1.2K, Firestone Ribbon Cutting-1.2K. | **Overview:** Engagement has risen as a result of an increase in story posts and higher organic reach driven by shares.

FACEBOOK Group Reach: 530 | **INSTAGRAM Reach:** 1.1k (CEP), 279 (ODM), 2 (Equine), 113 (BellevueCEP)

Email Blast Open Rate: Number of people opening email blasts are at 20,211 - click rate 1,549 **Open Rate: 43%**

CEP Website Visits: Sessions: 4,967 | **Average Session:** 00:05:18 | **Overview:** Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared via our social media platforms. More than 33% of visits come from direct links through our newsletter or social media channels.

LinkedIn Followers & Post Impressions: 8,243 organic impressions with 47 new followers at 3,172 total. LinkedIn views continue to increase due to more frequent posts and our video series. Starting in 2024, LinkedIn stats will be shared with Bryce and Bart.



Dawn
Bowman

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2024 FB 22,446 and IG 2,798 : **Jan FB 22,855 +409 , IG 2,949 + 151, Feb FB 23,849= +994 IG 3,109 = +311, March 24,346= +497 IG 3183= +74, April 24,816 =+470, IG 3,296=+113 May 24,914 =+98, IG 3,355=+59, June 25,030=+116, IG 3401=+46, July 25,171= +141 IG 3504=+103, Nov 25,665 IG 4033**

Market Vendors (336/mo): Jan 332, Feb 376, March 462, April 408, May 417, June 402, July 341, Aug 462, Sept 411, Oct 407, Nov 570

36 Pavillion Rentals for the year: Jan 6, Feb 4, March 4, April 5, May 4, June 4, July 3, Aug. 1, Sept 7, Oct 6, Nov 4

12 Self-generated ODM events: Jan 0, Feb 1, March 1, April 1, May 0, June 1, July 0., Aug. 0, Sept 0, Oct 0, Nov 0

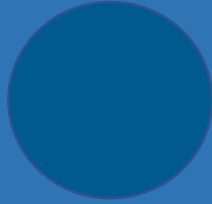
Provide 2 Vendor Workshops a Year:



N/A

TBD

Dawn Bowman Director Ocala Downtown Market	Ocala Downtown Market	Increase Social Media Followers (333/mo): Starting 2024 FB 22,446 and IG 2,798 : Jan FB 22,855 +409 , IG 2,949 + 151, Feb FB 23,849= +994 IG 3,109 = +311, March 24,346= +497 IG 3183= +74, April 24,816 =+470, IG 3,296=+113 May 24,914 =+98, IG 3,355=+59, June 25,030=+116, IG 3401=+46, July 25,171= +141 IG 3504=+103, Nov 25,665 IG 4033
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		12 Self-generated ODM events: Jan 0, Feb 1, March 1, April 1, May 0, June 1, July 0., Aug. 0, Sept 0, Oct 0, Nov 0
		Provide 2 Vendor Workshops a Year:
N/A TBD		



TBD

Director of
Business
Advocacy

Business Advocacy

Inter-City Visit > Established a task force to incorporate and apply the successful strategies we observed in Savannah into our own practices in Ocala. 2025 Quest Trip will be to Huntsville, AL in the fall.

Attended (4) Government Meetings or Workshops: Two meetings attended in December

Host Quarterly Workshops / Roundtables on Business Issues: None for December

Community
Updates
and
Citizens
Encouraging
Progress, Inc.
(CEPI) Updates

Local & Legislative

Marion County Legislative Delegation Luncheon presented by AT&T and hosted by College of Central Florida on Wednesday, January 8th.

Director of Advocacy position will remain open through the Spring of 2025



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

- We facilitated meetings to discuss the Child Care Tax Credit program. This program will help local employers tackle the childcare shortages that their employees may be facing.
- The next Inside Industry Ocala is being planned for mid-January. This networking event brings Ocala's manufacturing and logistics sectors together to share best practices and build new relationships. This event will be held at R+L Global Logistics and sponsored by Ameris Bank.
- Project Liberty has been reactivated. This potential existing employer expansion would result in hundreds of new jobs and millions in capital investment. Very exciting opportunity.
- Connected local employer with Project Flower. This connection could result in millions in revenue for the local employer and solve some logistical issues the company is experiencing across the country.
- Our team is meeting with several local employers in preparation for two upcoming trade shows. Not only will we be meeting with businesses about benefits of relocating to the Ocala Metro, we will be making connections for existing Ocala employers.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

- Visited the Max Planck Neuro Institute and UF Scripps cluster in Jupiter Florida. Ocala Royal Dames is funding a glioblastoma research with UF Scripps facility. STEM and R&D ideas as well as foundation and partnership across the state were a result of the visit.
- Hosted the Q4 CEP Healthcare Council meeting at College of Central Florida, where the council was treated to a behind the scenes first look at the new state of the art Nursing facility coming on line in early Q1. CFC Staff presented on upcoming new programs, funding and whats next for higher education in Ocala
- Hosted the SVP of BioFlorida with the Council meeting and toured WEC for upcoming meeting opportunities for regional meetings in 2025 in Ocala. Bringing Life Science partners in market is key to growing the existing footprint.
- CEP Life Science Flex Space discussions continue to expand with education and New developments lend to partnerships for the space.
- Follow up with Canadian based Reproductive company looking at Animal life science sector, with key in market connection made.



Bryce
Morrison

Director of
Business
Development

Business Development

- LLH had 1,678 Visit this month.
- Working with Duke Energy Economic Development team to strategize on marketing sites for 2025.
- Finalized video marketing schedule for 2025.
- Coordinating site visit for Project Snare with the company and Select Florida. Several discussions with Duke Energy surrounding infrastructure improvements and current sites.
- Updated Sites & Buildings as necessary.



Evelyn
Reyes

VP, Business
Creation

Business Creation &
Hispanic Engagement

Attended the CEP CEO Network Reception.

Completed and executed BC Teams yearly reviews.

BC Team has entered 77 business workshops into growth zone and rooms calendar

BC Team has created all fyers for next years business workshops.



Blinkhorn
COO/Director Of
Talent

Networks
(Talent Development)

Construction Academy Meeting: none scheduled

Primary Contact Meetings: Lunch with Gary from MTC on 12/4.

Assist Youth Business Plan Competition: nothing scheduled.

NEXTworking: none scheduled.

Other: Belleview On The Rise on 12/3, lunch with Laurie Zink of IHMC on 12/5, part of the Golden Apple caravan on 12/11, PEFMC Board social after-hours on 12/11, IHMC Holiday after-hours party on 12/12, Business After Hours at Gulf Atlantic Bank on 12/19, and ongoing aPHR certification preparation.



Jessica
Michel

Director of
Business
Creation

Power Plant Incubator

PPBI Occupancy: 85.7%. Moved co-working office with 6 desks to Downstairs office 114. 3 office spaces available (110, 107, 205). SCORE has dedicated office Space in 109. Market Ventures moving into additional Conference Space. Webway moved to office 200

Professional Development: InBIA's Entrepreneurship Center Management (ECM) Certificate Program - completed

Content Creation: Completed Slides for EM - Finalized Website Development for PPBI Website for another year. Created Power Point Presentation Slides for Hablemos.

Programming: Power Partner Exchange - Next one is February 12th. Finalizing Speaker Jorge with Silva Law

Total Jobs Created at the PPBI: 715 Total Graduate in 2024 - 4



Director of
Entrepreneurship
Services

2nd Stage Businesses

Finalized Application & Flyer for Youth Business Plan Competition

Secured EIR Speaker for 1st Quarter of 2025

Opened Applications for Youth Business Plan Competition and updated landing page for PPBI website

Secured Traveling 1 MC locations for Quarters 1 & 2 of 2025

Updated the Start Up Space Directory for our Incubator Partners



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): First Federal Bank, SouthState Bank, Pounds Construction, Colomb Investment Management, PRP Aviation, Club Adena, Cogent Bank, Renasant Bank, Market Street at Heathbrook, PNC Bank, All Dry Services, HFHC, WEC, AdventHealth, HCA, Professional Realty, Wire3, Jumbolair, Sherman Mechanical.

Executive Partner Events (10/yr): CEO Network Reception was held December 3rd at the Hilton Garden Inn Downtown (61 attendees).

Executive Tier Introductions: First Federal Bank/Wilmek Construction, Pounds Construction/Cogent Bank, Club Adena/SouthState Bank, Club Adena/PRP Aviation, SouthState Bank/All Dry Services, SouthState Bank/PRP Aviation, Renasant Bank/Club Adena.

Sponsorships (\$260K/yr): Horse Farms Forever (2025 Annual Luncheon), Pixelemm (CEP 101), Duke Energy (2025 Annual Luncheon), Reveille (4 EMs in 2025), Reveille (Biannual Chairman's Lunch 2025), Florida Blue (3 Fast Forward Banner ads).

CEP 101s (200 attend./yr): Our combined November/December CEP 101 was on Dec. 4th --- 13 attendees.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > December 3 - Jaye Baillie with MCA - State of the Arts in Marion County (7 CEP partners)

Friday Talks > December: CANCELLED per TD Bank

Leadership Ocala Marion (LOM) > December 13: Elected Officials Session - SOE, State and Local Elected Officials (36 partners)

Leadership Ocala Marion Youth (LOMY) > December 2: Local Government: Kathy Bryant, Amanda Tart, Ben Marciano, Chief Balken, Mock Commission Meeting (38 students)

exCEptional Mornings > December 18: Florida Sports Foundation (246 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

OCEP Partner Events (10/mo): 9 ribbon cutting/groundbreaking events

Business After Hours (400/month): 350 attendees at Business After Hours Gulf Atlantic Bank

Other CEP Events (150/mo): approximately 22 attendees at events; President's Luncheon. No NetWorks or other misc events in December

BCEP BAH/BotR (300/mo): Belleview events BotR Dec 3rd @ 100 and BBAH 5th @ 150 for Holidays

BCEP Other events (5/mo): 1 RC BCEP



Chris
Blakenship
Partner Relations
Associate

Partner Sales

New Partner Sales: 8 @ \$7000

Cold Calls: 90

New Partner Meetings: 15

End of First Year Renewals: 7 @ \$4500

Partner Upgrades: 1 @ \$1900



Ron Hipner
Partner Relations
Associate

Partner Sales

New Partner Sales: 1 @ 600

Cold Calls:

New Partner Meetings: 2

End of First Year Renewals:



Matt
Wilkerson
Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 19 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 30 in-depth calls

Partner Videos (8/mo): 16 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list.



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners: 3

BCEP Cold Calls: 12

BCEP New Partner Meetings: 6

BCEP Sponsorship: \$0

BCEP Partner Upgrades: none



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 77 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 4 partners retained from 60-90+ days past due

Partner Upgrades & Value: 0

Partner Events (Scheduling & posting): 37



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: Christmas Equine Meeting at the Marchador Farm with 39 partners present with a Marchador 101 and Equine 201, demos and Christmas celebration with Brazilian cuisine and a live singer sponsored by Equifence of Florida

Equine 101 & 201: Marchador 101 and Equine Initiative 201 sponsored by Dillon Media

Farm/Venue/School Visit: Oak Bell Farm - CC Bellandi Marchador Farm

Equine Events and Community Meetings: Attended the American Association of Equine Practitioners (AAEP) in Orlando, networking and learning about new equine tech products

Equine Industry Promotion: Wrote the equine newsletter and wrote the Everything Equine section for Ocala Magazine. Gave out information about the Equine Initiative at the AAEP to vendors at the trade show



Kimberly
Langley

Executive
Assistant

Finance & Administration

Past Due Outreach - 45

Verify All New Partners Billing: December 2024

Pull Renewal Report - December 2024

Pay All Open Invoices Weekly - December 2024



Donna
Marseco

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

Relocation guide packets sent within two weeks of receipt via phone or email

Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges (Weekly Basis) (50)

Resolve Partner Billing Discrepancies (Weekly Basis) (50)

Verify that all bills recorded in the accounting software have an invoice/support (Weekly Basis) (50)

Record credit card charges (Weekly Basis) (50)

Operational Meetings - Meet with Dean 4 times



Jessica Gilbert
VP Foundation
for CEP

Foundation

Grant Funding: 10k approved (pending receipt) (TD Bank) - \$5000 Papa Johns Grant (LOMY) - 10K PNC Grant

Applications pending: FL Blue (\$50,000)

Ended 2023 with total Foundation income of \$298,204.

The Catalyst had 22 downloads/views between all channels including YouTube.



Sullivan
Hogan
Director of Video

Communications

Weekly Buzz Views: There were 4534 views for episodes 293 - 296 well exceeding our stretch goal average of around 2650 views per month, with episode 295 notably reaching over 1.4K views on Facebook.

CEP on the Scene Views: There were 585 views for CEP on the Scene this month.

POV Ocala Views: There were 2133 views for episodes 69 & 70.

Irregular Series Views (Closer Look, Leading):

Additional Internal Videos: one promo for ticket sales for Annual Luncheon and a filmed BOTR



Arin
Conrad
Director of
Communications &
Marketing

Communications

New Facebook Followers: 60 new monthly followers | 13,180 total followers

FACEBOOK Post Reach: 19.7k | **Engagement:** 1.5k | **Top posts:** Beyond Skin RC-3k, CEO Departure Press Release-2.8K, Elite Equestrian RC-2.8K, Gulf Atlantic Bank BAH-1.7K, Sparr Building RC-1.6K, Stay APT RC-1.5K, December EM Pics-1.5K, Papa Johns Press Release-1.2K | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach.

FACEBOOK Group Reach: 2,807 | **INSTAGRAM Reach:** 1.6k (CEP), 1.1k (ODM), 0 (Equine), 50 (BellevueCEP)

Email Blast Open Rate: Number of people opening email blasts are at 10,749 - click rate 856 | **Open Rate: 48%** | **Overview:** Over the past few months, we have reduced the volume of emails sent, resulting in a 6% increase in our open rate. This demonstrates that our emails are now more targeted and purposeful, with recipients engaging with them before deleting.

CEP Website Visits: Sessions: 6,661 | **Average Session:** 00:03:27 | **Overview:** Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared.

LinkedIn Followers & Post Impressions: 13,097 organic impressions with 49 new followers at 3,210 total. LinkedIn views continue to increase due to more frequent posts and our video series. Starting in 2024, LinkedIn stats will be shared with Bryce and Bart.



December 2024



Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2024 FB 22,446 and IG 2,798 : Jan FB 22,855 +409 , IG 2,949 + 151, Feb FB 23,849= +994 IG 3,109 = +311, March 24,346= +497 IG 3183= +74, April 24,816 =+470, IG 3,296=+113 May 24,914 =+98, IG 3,355=+59, June 25,030=+116, IG 3401=+46, July 25,171= +141 IG 3504=+103, Nov 25,665 IG 4033 Dec 25,781 IG 4.158

Market Vendors (336/mo): Jan 332, Feb 376, March 462, April 408, May 417, June 402, July 341, Aug 462, Sept 411, Oct 407, Nov 570, Dec 427

36 Pavillion Rentals for the year: Jan 6, Feb 4, March 4, April 5, May 4, June 4, July 3, Aug. 1, Sept 7, Oct 6, Nov 4, Dec 5

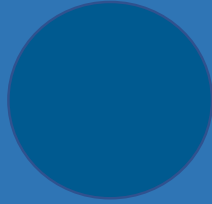
12 Self-generated ODM events: Jan 0, Feb 1, March 1, April 1, May 0, June 1, July 0., Aug. 0, Sept 0, Oct 0, Nov 0, Dec 1

Provide 2 Vendor Workshops a Year:



TBD

This image shows a blank sheet of white paper with horizontal ruling lines. A single vertical blue line runs down the left side, creating a margin. There are ten horizontal black lines spaced evenly across the page, starting from the top edge and ending at the bottom edge. The lines are thin and consistent in weight. The overall appearance is that of a clean, unused piece of stationery or notebook paper.



TBD

Director of
Business
Advocacy

Business Advocacy

Inter-City Visit > Established a task force to incorporate and apply the successful strategies we observed in Savannah into our own practices in Ocala. 2025 Quest Trip will be to Huntsville, AL in the fall.

Attended (4) Government Meetings or Workshops: (1/21) Marion County Board of County Commissioners, (1/28) Marion County School Board, and (1/29) Viewed video of MCBCC Workshop on Impact Fees

Host Quarterly Workshops / Roundtables on Business Issues: Marion County Legislative Delegation Luncheon presented by AT&T and hosted by College of Central Florida on Wednesday, January 8th.

Community
Updates
and
Citizens
Encouraging
Progress, Inc.
(CEPI) Updates

Local & Legislative

Director of Advocacy position will remain open through the Spring of 2025



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

I attended the SHOT Show (Shooting Hunting Outdoor Trade) trade show. This show brings together more than 5,000 businesses and 54,000 attendees. Our goal is to attract businesses to the Ocala Metro, as well as find connections for existing businesses.

The first Inside Industry Ocala of 2025 was held at the R+L Global Logistics headquarters with more than 100 attendees. This event brings our manufacturing, distribution, logistics, construction, and engineering sectors together for networking, sharing best practices, and relationship building.

Our team attended a marketing event hosted by Insite Real Estate to promote their 115 acres of land at the Ocala International Airport. Dozens of industrial brokers and developers from South Florida attended.

I also attended the World of Concrete trade show. More than 6,000 businesses and 60,000 individuals attended this show. We had hundreds of conversations about our community's growth and strong economy, while also promoting our existing employers.

Project Summer - This highly competitive manufacturing project involves an existing Ocala business and could potentially create more than 200 new jobs and a large capital investment.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Hosted CEP Healthcare council Kick off lunch at WEC 65 HC Leaders, Educators and partners. Additional partner attendees for this event to network with the group were HC developers, and utility partners and city manager.

Attended the Insite team developer event in Tampa with the JC team to promote the property available at the Ocala International Airport.

Hosted the SVP of BioFlorida with the Council meeting and toured WEC for upcoming meeting opportunities for regional meetings in 2025 in Ocala. Bringing Life Science partners in market is key to growing the existing footprint.

CEP Life Science Flex Space discussions continue to expand with 2025 looking promising for partnership and forward momentum.

In preparation with the BioFlorida team for the upcoming legislative session for BioFL day in Tallahassee



Bryce
Morrison

Director of
Business
Development

Business Development

LLH had 1,358 Visit this month.

We did not receive any RFI's this month

Did not attend any trade shows this month.

Attended Consultant/Broker event for the Insite property at Ocala International Airport.

Updated Sites & Buildings as necessary.



Open Position

Director Of
Advocacy &
Talent
Development

Talent Development & Advocacy



Evelyn
Reyes

VP, Business
Creation

Business Creation

Prepared and conducted OMCF Board Meeting & OMCF Loan Review Committee meeting

Approved one NANO Loan of \$2,000

Attended Inside Industry Ocala

Attended 2025 Healthcare Council Kick Off Luncheon

Conducted first Hispanic Outreach meeting for 2025 with community leaders.



Jessica
Michel

Director of
Business
Creation

Power Plant Incubator

PPBI and IMPACT Occupancy: 68%. office spaces available (110, 107, 205). 4 Offices in IMPACT. SCORE has dedicated office Space in 109. Market Ventures moved into 209. Provided Free Headshots for Incubator Partners

Community Outreach: Mary Sue Rich Center Visit. Edwards Professional Complex Tour

Content Creation: Updated PPBI Logo, Working on Access to Capital Cohort Logo, created Relocation Ad for Incubator Program

Programming: Power Partner Exchange - Next one is February 12th. Jorge Sillvia is our Speaker - Teaming agreements and contractual law

Partner Prospects: Onboarding 2nd Partner into IMPACT Business Incubator - Northern Nexus (Women owned - minority)



Director of
Entrepreneurship
Services

2nd Stage Businesses

As part of my youth community outreach I attended North Marion County Career Day

Secured EIR Speaker for 2nd Quarter of 2025

As part of my youth community outreach I exhibited at MCPS Career Fair at Belleview High School

Conducted Traveling 1MC at the Mary Sue Rich Center

Attended Eustis 1MC for Power Plant Partner Presentation



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Ameris Bank, McLauchlin & Co, Insite Real Estate, Heart of Florida Health Center, Sonic, Cogent Bank, HCA, Stentiford Construction, Signature Brands, Encompass Health, The Boyd Group, Advanced Welding, Clymer Farner Barley, Adena, College of Central Florida, Tri-Eagle, Raney's Inc, First Federal Bank, R+L, Cox Communications.

Executive Partner Events (10/yr): A special Private Reception was held for Adena on Jan. 30th.

Executive Tier Introductions: Coca-Cola/Reilly Arts Center, Reilly Arts Center/Phoenix House, CF/Phoenix House, Adena/McLauchlin Group, Fenix Staffing/Dollar General, Fenix Staffing/Champion Manu.

Sponsorships (\$260K/yr): Advanced Welding (Catalyst Podcast), Advanced Welding (EM March), Advanced Welding (Nextworking CTE Programs), Rock The Country (March BAH), Mid-Florida Agencies Florida Blue (Sept BAH), Heart of Florida Health Center (May BAH), Colen Built Development (Youth Business Plan Competition).

CEP 101s (200 attend./yr): Our January CEP 101 --- 20 attendees.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > January 7: Arts in Health with Patricia Tomlinson (11 CEP partners)

Friday Talks > January 31: Economic Update with Kevin Sheilley (30 CEP partners)

Leadership Ocala Marion (LOM) > January 14: Community Session. January 28: Fire Session (36 partners)

Leadership Ocala Marion Youth (LOMY) > January 13: Healthcare Session at Advent Health (38 students)

exCEptional Mornings > January 15: Colen Built Update on Southwest Ocala and Foundation (350 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 6 ribbon cutting/groundbreaking events

Partner Meetings: 18 meetings - 9 Business, 3 Premium, 3 Founders Club (County and City), 3 Leadership

Engagement Events (150/mo): approximately 22 attendees at events; President's Luncheon. No NetWorks or other misc events in December

BCEP BAH/BotR (300/mo): Belleview events BotR Jan 28th @ 85 and BBAH Jan 25th @ 190

Outreach Activity (100/mo): 62 Ambassador partner calls



Chris
Blakenship
Partner Relations
Associate

Partner Sales

New Partner Sales: 19 @ \$13,200 (3 Premium & 16 Business)

Cold Calls: 118 (35 to recently dropped partners)

New Partner Meetings: 20 (15 in person)

End of First Year Renewals: 18 @ \$13,800 (5 Premium & 13 Business)

Partner Upgrades: 1 @ \$900 (Ent to Premium)



Ron Hipner
Partner Relations
Associate

Partner Sales

New Partner Sales: 1 @ 600

Cold Calls:

New Partner Meetings: 2

End of First Year Renewals:



Matt
Wilkerson
Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 19 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 30 in-depth calls

Partner Videos (8/mo): 16 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list.



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$5900. (1 Leadership, 1 Business and 1 Entrepreneur)

BCEP Cold Calls: Report what you and ambassadors do... canvassing days, etc. - Invitations to our events with ambassadors (Mike & Betty) . Olivia did 9 outreaches with invitations.

BCEP Partner Meetings: 6 Include anything of note

BCEP Sponsorship: \$1600 for Jan BotR and Feb BBAH

BCEP Other Engagement: Bellevue Business Leaders (15), Friday Foodie Fest (10)



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 80 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 6 partners retained from 60-90+ days past due

Partner Upgrades & Value: Advanced Welding; Chairmain's Circle-->Founder's Club \$30,000 West Law Firm; Entrepreneur--> Business \$600

Partner Events (Scheduling & posting): 44



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Meeting was held at HITS with 56 partners present with a show jumping 101, refreshments sponsored by Pat Myers Electric and golf cart tours by JB Golf Carts

Equine 101 & 201: Show Jumping 101 by Mv Equestrian LLC

Farm/Venue/School Visit: HITS

Equine Events and Community Meetings: Florida Horse Park Board Meeting, CF Vintage Farm for a BAC/Equine Ed Meeting

Equine Industry Promotion: Wrote the equine newsletter and wrote the Everything Equine section for Ocala Magazine. Met with Tri-Eagle to assist with a Budweiser Clydesdales event downtown



Kimberly
Langley

Executive
Assistant

Finance & Administration

Past Due Outreach - 30

Verify All New Partners Billing: Jan 2025

Pull Renewal Report - Jan 2025

Pay All Open Invoices Weekly - Jan 2025



Donna
Marseco

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

Relocation guide packets sent within two weeks of receipt via phone or email

Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges (Weekly Basis) (50)

Resolve Partner Billing Discrepancies (Weekly Basis) (50)

Verify that all bills recorded in the accounting software have an invoice/support (Weekly Basis) (50)

Record credit card charges (Weekly Basis) (50)

Operational Meetings - Meet with Dean 4 times



Jessica Gilbert
VP Foundation
for CEP

Foundation

Grant Funding: 10k (PNC) & 50K (Fl Blue)

n/a

Ended 2024 with total Foundation income of \$298,204.

The Catalyst had 28 downloads/views between all channels including YouTube.



Sullivan
Hogan
Director of Video

Communications

Weekly Buzz Views: There were 4534 views for episodes 293 - 296 well exceeding our stretch goal average of around 2650 views per month, with episode 295 notably reaching over 1.4K views on Facebook.

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Arin
Conrad
Director of
Communications &
Marketing

Communications

New Facebook Followers: 60 new monthly followers | 13,180 total followers

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Dawn
Bowman

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB = + IG = +, March = + IG = +, April =+, IG =+ May =+, IG =+, June =+, IG =+, July = + IG =+, Nov IG Dec IG

Market Vendors (336/mo): Jan 350, Feb , March , April , May , June , July , Aug , Sept ,Oct , Nov , Dec

36 Pavillion Rentals for the year: Jan 3, Feb , March , April , May , June , July , Aug. , Sept , Oct , Nov , Dec

12 Self-generated ODM events:Jan 0, Feb 1 , March , April , May , June , July ., Aug. , Sept , Oct , Nov , Dec

Provide 2 Vendor Workshops a Year:



N/A

TBD

CEP OCALA METRO CHAMBER & ECONOMIC PARTNERSHIP		Activity Report <u>Business Support</u>		January 2025	
 Dawn Bowman Director Ocala Downtown Market	Ocala Downtown Market	Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB = + IG = +, March = + IG = +, April =+, IG =+ May =+, IG =+, June =+, IG =+, July = + IG =+, Nov IG Dec IG			
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		36 Pavillion Rentals for the year: Jan 3, Feb , March , April , May , June , July , Aug. , Sept , Oct , Nov , Dec			
		12 Self-generated ODM events:Jan 0, Feb 1 , March , April , May , June , July ., Aug. , Sept , Oct , Nov , Dec			
		Provide 2 Vendor Workshops a Year:			
 N/A TBD					



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Project Diamond, a highly competitive advanced manufacturing project, is considering a site in our community. This project would bring \$800 million in capital investment, 800+ jobs, and life to a new industrial park. Transformative project.

Our team attended the Florida Huddle event at WEC. We met with several businesses in aviation to discuss the future of aviation in the Ocala Metro.

Project Colorado meetings are proceeding. We held a joint meeting with CareerSource CLM to discuss workforce training opportunities, hiring events, job postings, and more. The company was very pleased with our efforts and feels positive about the Ocala market.

A large manufacturing project continues property negotiations. This transformative project would bring hundreds of jobs, more than \$100 million in capital investment, and strengthen our region's economy.

Project Summer - This highly competitive manufacturing project involves an existing Ocala business and could potentially create more than 200 new jobs and a large capital investment. Also connected this business to CareerSource CLM to discuss workforce training opportunities.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Attended the Bio Florida Legislative days, with individual delegation meetings around the Ocala Metro.

Attended the Insite team developer event in Tampa with the JC team to promote the property available at the Ocala International Airport.

Hosted the CEP Healthcare Insider with 50+ healthcare and life science partners connecting and building relationships

CEP Life Science Flex Space discussions continue to expand with 2025 looking promising for partnership and forward momentum.

Attended the first quarter EMS Advisory Board meeting



**Bryce
Morrison**

Director of
Business
Development

Business Development

LLH had 1,244 Visit this month.

We submitted 3 RFI's this month. Project Plum (electronics manf), Project Next (battery manf), and Project Factory (electronics manf).

Did not attend any trade shows this month.

Shared linkedin post regarding Florida ranking as best place to start a business targeting startups and entrepreneurs.

Updated Sites & Buildings as necessary.



Open Position

Director Of
Advocacy &
Talent
Development

Talent Development & Advocacy

Attended (4) Government Meetings or Workshops: None in February

Host Quarterly Workshops / Roundtables on Business Issues: None in February. Working on a follow up to Child Care Tax Credit for March.

NOTE: CXO attended Florida Chamber Fly-In February 9-10. Presentations & discussion with various legislators and cabinet members. Legislative Session begins March 4th.



**Evelyn
Reyes**

VP, Business
Creation

Business Creation

Attended Florida Huddle WEC Tourism Event

Attended the Black Business Summit- Orlando Magic

On-Boarding of new Director IMPACT Entrepreneurship Services.

Presented at the " Hablemos De Negocios" Educational workshop- How to create a business plan.

Met with 3 Banks that are CEP Partners and presented OMCF funding opportunity.



Jessica Michel

Director of
Business
Creation

Power Plant Incubator

Power Plant Business Incubator and IMPACT Business Incubator Occupancy: 70% Welcomed Northern Nexus LLC at IMPACT Business Incubator. 4 offices available at IMPACT & 3 offices available in PPBI

Community Outreach: Toured Edwards Complex, Attended BNI Dream Team event. Met with Plug and Play Orlando

Content Creation: Working with Intern to finalize social Media calendar for March - Updated marketing info for new employee on all educational workshops and promotional material.

Power Plant Social Media: Total Audience (Website, LinkedIn, Instagram): Increased from 1,873 in January to 1,929 in February (+56 new followers/visitors) +3%

Programming: Power Partner Exchange: Jorge Sevilla with Sevilla Law presented to 13 PPBI Partners and Alumni on trading agreements, contracts and best practices. Next meeting in May



Freddie Morris

Director of
Entrepreneurship
Services

2nd Stage Businesses

Hosted Black History Month Business Forum

Started Ice House Entrepreneurial Mindset Course

Attended Orlando Magic Black Business Summit

Recorded an episode of POV Ocala to share all of the free resources we provide to the community

Shot & Edited spotlight video for one of our Incubator Partners (Webway Studios)



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): HCA Florida Ocala Hospital, AdventHealth, The Vines Hospital, Ameris Bank, McLaughlin & Co, CF, Zinnia Wealth Management, Insite Real Estate, R+L Global Logistics, Rock The Country, Raney's, Cogent Bank, HDG Legacy, Pat Myers Electric, BenMar Construction, SouthState Bank, Reveille Wealth Management.

Executive Partner Events (10/yr): The next Executive Roundtable Lunch will be held March 25 at The Reilly Arts Center Black Box.

Executive Tier Introductions: Custom Windows/James Moore, Rock The Country/Mojos, Rock The Country/La Casella, Rock The Country/Swamp Dog, Northwestern Mutual/Reveille, JB Golf Cart/Rock The Country, Adena/Boyd, Adena/CF, Adena/WEC, Adena/Citizens First Bank.

Sponsorships (\$260K/yr): H2 Advisors (July EM), VyStar Credit Union (Executive Roundtable Lunch 1Q), Raney's (Youth Business Plan Competition), FleetForce (April EM), Engel & Volkers (May BAH), Ameris Bank (Industry Insider), Paddock Mall (June BAH),

CEP 101s (200 attend./yr): Because of the Annual Luncheon, the February CEP 101 will be held on Wednesday, March 5.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > February 4: Accounting Basics with Kyle Schaeffer with H2 (18 CEP partners)

Friday Talks > February 28: Leveraging with SBA Loans with TD Bank (10 CEP partners)

Leadership Ocala Marion (LOM) > February 11: Healthcare Session with AdventHealth, HCA Florida, The Vines and SMA (36 partners)

Leadership Ocala Marion Youth (LOMY) > February 3: Arts Session at The Reilly and February 24: AG Session at SEYF (38 students)

exCEptional Mornings > February 19: Confresswoman Kat Cammack update from D.C. (320 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 14 ribbon cutting/groundbreaking events

Partner Meetings: 26 meetings - 9 Business, 7 Premium, 5 Legacy, 4 Leadership

Engagement Events (150/mo): approximately 105 attendees at events; President's Luncheon, Conexion Hispana, CEP Power Network, YBL, BBL, Networks, and Stiletto Networks meetings

BCEP BAH/BotR (300/mo): Belleview events BotR Jan 28th @ 90 and BBAH Jan 25th @ 200

Outreach Activity (100/mo): Apprx 220 outreach, both new and established partners



**Chris
Blakenship**

Partner Relations
Associate

Partner Sales

New Partner Sales: 21 @ \$17,300 (1 Ent, 16 Bus, 2 Prem, 2 Leg)

Cold Calls: 122 (28 to recently dropped partners)

New Partner Meetings: 22 (13 in person)

End of First Year Renewals: 9 @ \$6975 (4 Bus, 4 Prem, 1 Leg)

Partner Upgrades: 0



Ron Hipner

Partner Relations
Associate

Partner Sales

New Partner Sales: 1 @ 600

Cold Calls:

New Partner Meetings: 2

End of First Year Renewals:



**Matt
Wilkerson**

Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 15 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 18 in-depth calls

Partner Videos (8/mo): 8 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list.



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$4200. (Seven Business Partners!)

BCEP Cold Calls: 70 - plus the ambassador shared invitations to events (47) With Betty Otero and Mike Perhealth)

BCEP Partner Meetings: 10 meetings with prospective partners and 36 meetings/visits with partners

BCEP Sponsorship: \$600 for March BBAH

BCEP Other Engagement: Bellevue Business Leaders meeting (15), vendor at City of Bellevue Friday Foodie Fest (16) Ambassadors meeting (10) Healthcare Insider networking event, Bourbon In The Barn, Boys&Girls Club board meeting, BNI Referrals of Impact and BNI Rain Makers for International Networking Week, PRAC committee meeting, President's Lunch, Thank A Teacher, attended 10 rc's & gb's with one for McKenny Chiropractic. **BCEP Ambassadors are calling all new partners to welcome them.**



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 77 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 3 partners retained from 60-90+ days past due

Partner Upgrades & Value: Charles Perry Partners, Inc. West Law Firm; Business-->Leadership =\$5000 Florida Blue; Premium--> Leadership = \$5000 Pixelemm; Legacy-->Leadership \$5000

Partner Events (Scheduling & posting): 53



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Advocacy Meeting was held at the CEP boardroom with 7 present with Jeannie Rickman from Ket Cammack's office to discuss the equine industry coloring book, the 5 year guest worker plan and the international equine quarantine

Equine 101 & 201: N/A

Farm/Venue/School Visit: HITS

Equine Events and Community Meetings: Marion United Horse Council Meeting, Pairing event for United Way Children's Charity Classic at HITS and Visitor's Bureau Visitor Florida event Equine Panel at WEC, met with Tri-Eagles Sales to plan a Budweiser Clydesdales event downtown

Equine Industry Promotion: Wrote the equine enewsletter, conducted, created and edited interviews to promote International Women's Day Equine Theme and for the United Way Children's Charity Classic show jumping event at HITS



**Kimberly
Langley**

Executive
Assistant

Finance & Administration

Past Due Outreach - 15

Verify All New Partners Billing: Feb 2025

Pull Renewal Report - Feb 2025

Pay All Open Invoices Weekly - Feb 2025



**Donna
Marseco**

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

Relocation guide packets sent within two weeks of receipt via phone or email

Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges (Weekly Basis) (50)

Resolve Partner Billing Discrepancies (Weekly Basis) (50)

Verify that all bills recorded in the accounting software have an invoice/support (Weekly Basis) (50)

Record credit card charges (Weekly Basis) (50)

Operational Meetings - Meet with Dean 4 times



Jessica Gilbert

VP Foundation
for CEP

Foundation

Grant Funding: 10k (PNC) & 50K (Fl Blue)

n/a

Ended 2024 with total Foundation income of \$298,204.

n/a

The Catalyst had 15 downloads/views between all channels including YouTube.



**Sullivan
Hogan**

Director of Video

Communications

Weekly Buzz Views: There were 7666 views for the Weekly Buzz this month well exceeding our stretch goal average of around 2650 views per month, with episode 304 notably reaching over 2.9K views on Facebook.

CEP on the Scene Views: There were 376 views for CEP on the Scene this month.

POV Ocala Views: There were 1890 views for POV Ocala this month

Irregular Series Views (Closer Look, Leading):

Additional Internal Videos: one Annual Luncheon promo and the sponsor video



**Arin
Conrad**

Director of
Communications &
Marketing

Communications

New Facebook Followers: 245 new monthly followers | 13,502 total followers

FACEBOOK Post Reach: 113.6K | **Engagement:** 3.2k | **Top posts:** Mooyah RC-135.1k, Cell-U-Light RC-15.5K, Waltz Brakes RC-13.8K, Annual Lunch Photos-6.5K, Weide Groundbreaking-6.2K, Maven RC-5.7K, McKinney RC-3.3K, Weekly Buzz Ep. 304-3K | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach.

FACEBOOK Group Reach: 6,199 | **INSTAGRAM Reach:** 3.9k (CEP), 1.5k (ODM), 0 (Equine), 57 (BellevueCEP)

Email Blast Open Rate: Open Rate: 49% | Overview: Over the past few months, we have reduced the volume of emails sent, resulting in a 6% increase in our open rate. This demonstrates that our emails are now more targeted and purposeful, with recipients engaging with them before deleting.

CEP Website Visits: Sessions: 8,809 | **Average Session:** 00:04:48 | **Overview:** Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared.

LinkedIn Followers & Post Impressions: 4,528 organic impressions with 56 new followers at 3,306 total. LinkedIn views continue to increase due to more frequent posts and our video series. LinkedIn stats are shared with Bryce and Bart.



February 2025



Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB 26,056 = 275+ IG 4,415 = 106+, March = + IG = +, April = +, IG =+ May =+, IG =+, June =+, IG =+, July = + IG =+, Nov IG Dec IG

Market Vendors (336/mo): Jan 350, Feb 408 , March , April , May , June , July , Aug , Sept ,Oct , Nov , Dec

36 Pavillion Rentals for the year: Jan 3, Feb 5, March , April , May , June , July , Aug. , Sept , Oct , Nov , Dec

12 Self-generated ODM events: Jan 0, Feb 1, March , April , May , June , July ., Aug. , Sept , Oct , Nov , Dec

Provide 2 Vendor Workshops a Year:



TBD

[illegible]



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Job Creation team met with Catawba County EDC to discuss data center projects. The process is relatively new to Florida, so we want to be ahead of the game and ready when needed.

Project Cabin, a local advanced manufacturer thinking of expanding in Ocala, toured a large industrial site. The expansion would generate \$50 million and create hundreds of jobs.

I coordinated a site visit to Silver Wolf Holdings for Ocala Police Department and Marion County Sheriff's Office. Based in Ocala, this facility assembles and distributes products for law enforcement agencies across the US.

I participated in the Advanced Economic Development Leadership Graduate program. Economic Development practitioners from across North America gathered to discuss ongoing challenges, best practices, and meet with site selectors to market our communities.

Project Summer - This highly competitive manufacturing project involves an existing Ocala business and could potentially create more than 200 new jobs and a large capital investment. Also connected this business to CareerSource CLM to discuss workforce training opportunities.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

CEP, HCA and UCF had a great collaborative and informative meeting around Life Science and Healthcare opportunities for the Ocala Metro

Attended the Industrial Asset Management Council, 2025 Spring Conference in Sacramento with 500 Economic Developers, Site Selectors, Commercial Developers and Utility providers. Great insight and collaboration across the board. Continuing to further our relationships for attraction and growth in Ocala.

Held the Q1 CEP Healthcare Council meeting with 32 of our healthcare leaders and organizations. Legislative overview, workforce and labor were discussed.

Select Florida provided a lead for a UK Equestrian Healthcare company and held a meeting with them during their Ocala visit. Looking at potential distribution options for their product in the US. Lots of great connections made in conjunction with our Dir. of Equine, Louisa.

Completed a Growth Team update for a regional attraction page on the CEP Website for use at the IAMC Conference and Select Florida dinner CEP Sponsorship opportunity. Great feedback.



Bryce Morrison

Director of
Business
Development

Business Development

LLH had 1,689 Visits this month.

We submitted 3 RFI's this month. Project Maple (food manf), Project Lightspeed (Data Center), and Project Blanco (Food manf).

Did not attend any trade shows this month.

Shared LinkedIn post regarding local manufacturing and state-wide manufacturing employment.

Updated Sites & Buildings as necessary.



Open Position

Director Of
Advocacy &
Talent
Development

Talent Development & Advocacy

Attended (4) Government Meetings or Workshops: None in February

Host Quarterly Workshops / Roundtables on Business Issues: None in February. Working on a follow up to Child Care Tax Credit for March.

NOTE: CXO attended Florida Chamber Fly-In February 9-10. Presentations & discussion with various legislators and cabinet members. Legislative Session begins March 4th.



Evelyn
Reyes

VP, Business
Creation

Business Creation

Funding of the \$300,000 grant is in the house

Attended the Gainesville Supplier Development Exchange

Attended the Cogent Bank SBA Loan Luncheon

Attended Puerto Rican Day in Tallahassee

Attended Lead team breakfast- Key note speaker Ice House author.



Jessica Michel

Director of
Business
Creation

Power Plant Incubator

Power Plant Business Incubator and IMPACT Business Incubator Occupancy: 70% Graduating this month: Funky Unicorn Treats will be graduating the PPBI and moving into Edwards Professional Complex. 4 offices available at IMPACT & 3 offices available in PPBI

Community Outreach: Presented to CF Entrepreneurs Club

Content Creation: Relo Guide Ad. Created Certificates for Ocala CEP Catalyst and Youth Biz plan Comp

Social Media/Website: Added IMPACT Construction Landing Page. Significant website traffic increase (+101% from February) Facebook saw the highest audience growth (+26 new followers) Total Audience Growth: +234

Programming: Finalizing Speaker and roundtable topic for May.



Freddie Morris

Director of
Entrepreneurship
Services

2nd Stage Businesses

Attended the Gainesville Supplier Development Exchange

Attended Lead team breakfast- Keynote speaker: Gary Schoniger The Founder of Ice House Entrepreneur Mindset Course.

Attended Career Fair at Lake Weir High School

Recorded and edited Spotlight Videos for 2 Power Plant Incubator Partners

Conducted Entrepreneur in Residence (EIR) Series: Quit or Commit



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Charles Perry Partners, Creative Springs, Alien Engineered Products, Steel Craft Builders, PUDDLES Restoration, Pyranha, Tri-Eagle Sales, ACME Fill, VyStar Credit Union, Main Street Realty & Development, Club Adena, R+L Global Logistics, Benmar Construction, Pro Realty, Ocala 489, Brookdale Chambrel Pinecastle, Wire3, HDG Legacy, Florida Credit Union.

Executive Partner Events (10/yr): The Executive Roundtable Lunch was held March 25 at The Reilly Arts Center Black Box with 70 Executive Tier Partners on hand.

Executive Tier Introductions: Carter's Towing/Rock The Country, Advanced Welding/Zinnia Wealth Management, First Federal Bank/Adena, VyStar Credit Union/Steel Craft Builders, Pro Realty/Ocala 489, Ocala 489/Pixelemm, Seacoast Bank/Steel Craft Builders.

Sponsorships (\$260K/yr): Ocala Family Medicine (Fast Forward - August), Bowlero East (BAH - July). (*Approaching sold out status.)

CEP 101s (200 attend./yr): Two CEP 101s were held in March, with 23 & 16 attendees respectively.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > March 4: Estella Byrd Whitman Health with Levonda Goodson (20 CEP partners)

Friday Talks > March 28: Lauren Debick with Creative Springs - Customer Service (16 CEP partners)

Leadership Ocala Marion (LOM) > March 11: Environment and History (36 partners)

Leadership Ocala Marion Youth (LOMY) > March 10: Public Safety at MCSO (38 students)

exCEptional Mornings > March 19: Q&A with Jeromy Williams (265 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 14 ribbon cutting/groundbreaking events

Partner Meetings: 29 meetings - 13 Business, , 4 Legacy, 7 Leadership, 3 Chairman's, 2 Champion

Engagement Events (150 attendees/mo): approximately **210** attendees at events; 18 at President's Luncheon, 70 at Conexion Hispana, CEP Power Network, YBL, BBL, Networks, and Stiletto Networks meetings; 39 at Catalytic Conversations; 21 at CEP 201; 60 attendees 2025 Ambassador event

BCEP BAH/BotR (300/mo): Belleview events BotR Jan 28th @ 74 and BBAH Jan 25th @ 215

Outreach Activity (100/mo): Apprx 90 outreach, prospective, new, and established partners



**Chris
Blakenship**

Partner Relations
Associate

Partner Sales

New Partner Sales: 26 @ \$37,900 (1 Ent, 17 Bus, 2 Prem, 4 Leg, 1 Leadership, 1 Champion)

Cold Calls: 127 (25 to recently dropped partners)

New Partner Meetings: 30 (14 in person)

End of First Year Renewals: 9 @ \$10,400 (7 Bus, 1 Prem, 1 Leadership)

Partner Upgrades: 0



Ron Hipner

Partner Relations
Associate

Partner Sales

New Partner Sales: 0

Cold Calls: 2

New Partner Meetings: 2

End of First Year Renewals: 0



**Matt
Wilkerson**

Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 16 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 16 in-depth calls

Partner Videos (8/mo): 8 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list.



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$3,100. (One Business & one Legacy!) \$4400. - Roam Electric- Upgrade from Bus to Leadership.

BCEP Cold Calls: 145 - plus the ambassador shared invitations to events and canvassing with Ashley Stouffer, Chris Crouch, Betty Otero and Mike Perhealth)

BCEP Partner Meetings: Four meetings with prospective partners and 18 meetings/visits with partners

BCEP Sponsorship: \$1350 for April BBAH & March BotR

BCEP Other Engagement: South Ocala Elem reading, Bellevue Business Works on Google with 25 attendees, vendor at City of Bellevue Friday Foodie Fest (20) Ambassadors meeting at IMPACT (16), Ambassador Social, Presented a Year Update at Bellevue City Commission, PRAC committee meeting, attended 6 rc's with one for BHS! & one gb with MC for Rotary Turf Fields, Judged Senior Capstone Presentations at BHS, Bellevue Business Leaders meeting, Marion Oaks Elem Career Day presenter, attended eM, BCEP Ambassadors are calling all new partners to welcome them.



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 66 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 7 partners retained from 60-90+ days past due

Partner Upgrades & Value: Roam Electric Business-->Leadership = \$5000

Partner Events (Scheduling & posting): 55



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Meeting was held at World Equestrian Center in conjunction with Tri-Eagles Sales for an Equine 101 on the Budweiser Clydesdales with 68 partners present

Equine 101 & 201: Budweiser Clydesdales 101

Farm/Venue/School Visit: N/A

Equine Events and Community Meetings: Live Oak International, International Women's Day Equine Industry Theme and Budweiser Clydesdales Parade Downtown

Equine Industry Promotion: Wrote the equine enewsletter, wrote the Everything Equine section for Ocala Magazine about Decoupling and created a video recap of the Equine Meeting to promote the Equine Initiative and the Budweiser Clydesdales downtown Parade



**Kimberly
Langley**

Executive
Assistant

Finance & Administration

Past Due Outreach - 69

Verify All New Partners Billing: March 2025

Pull Renewal Report - March 2025

Pay All Open Invoices Weekly - March 2025



**Donna
Marseco**

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

Relocation guide packets sent within two weeks of receipt via phone or email

Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges (Weekly Basis) (50)

Resolve Partner Billing Discrepancies (Weekly Basis) (50)

Verify that all bills recorded in the accounting software have an invoice/support (Weekly Basis) (50)

Record credit card charges (Weekly Basis) (50)

Operational Meetings - Meet with Dean 4 times



Jessica Gilbert

VP Foundation
for CEP

Foundation

Grant Funding: TD grant applied for- CDFI funding recived (\$300,000)

n/a

Ended 2024 with total Foundation income of \$298,204.

n/a

The Catalyst had 22 downloads/views between all channels including YouTube.



**Sullivan
Hogan**

Director of Video

Communications

Weekly Buzz Views: There were 6706 views for the Weekly Buzz this month well exceeding our stretch goal average of around 2650 views per month, with multiple episodes breaking over 1K views on Facebook.

CEP on the Scene Views: There were 2183 views for CEP on the Scene this month.

POV Ocala Views: There were 2860 views for POV Ocala this month

Irregular Series Views (Closer Look, Leading):

Additional Internal Videos: N/A



**Arin
Conrad**

Director of
Communications &
Marketing

Communications

New Facebook Followers: 206 new monthly followers | 13,686 total followers

FACEBOOK Post Reach: 94.1k | **Engagement:** 2.7k | **Top posts:** Great Greek RC-100.8k, Budweiser Clydesdales-18.8K, Club Pilates RC-13.5K, Sisters Place RC-8.9K, Kimberlys Center RC-6.9K, March BAH-5.2K, March EM-4.3K, Project Hope RC-3.5K | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach.

FACEBOOK Group Reach: 5,957 | **INSTAGRAM Reach:** 14.2k (CEP), 20.3k (ODM), 10 (Equine), 382 (BellevueCEP)

Email Blast Open Rate: Open Rate: 47% | **Overview:** Over the past few months, we have reduced the volume of emails sent, resulting in a 6% increase in our open rate. This demonstrates that our emails are now more targeted and purposeful, with recipients engaging with them before deleting.

CEP Website Visits: Sessions: 7,180 | **Average Session:** 00:05:19 | **Overview:** Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared.

LinkedIn Followers & Post Impressions: 4,508 organic impressions with 57 new followers at 3,356 total. LinkedIn views continue to increase due to more frequent posts and our video series. LinkedIn stats are shared with Bryce and Bart.



**Dawn
Bowman**

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB 26,056 = 275+ IG 4,415 = 106+, March FB 26,197=141+ IG 4,579 = 164+, April =+, IG =+ May =+, IG =+, June =+, IG =+, July = + IG =+, Nov IG Dec IG

Market Vendors (336/mo): Jan 350, Feb 408 , March 521 , April , May , June , July , Aug , Sept ,Oct , Nov , Dec

36 Pavillion Rentals for the year: Jan 3, Feb 5, March 3, April , May , June , July , Aug. , Sept , Oct , Nov , Dec

12 Self-generated ODM events:Jan 0, Feb 1, March 1, April , May , June , July ., Aug. , Sept , Oct , Nov , Dec

Provide 2 Vendor Workshops a Year:



N/A

TBD

Dawn Bowman Director Ocala Downtown Market	Ocala Downtown Market	Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB 26,056 = 275+ IG 4,415 = 106+, March FB 26,197=141+ IG 4,579 = 164+, April =+, IG =+ May =+, IG =+, June =+, IG =+, July = + IG =+, Nov IG Dec IG
		Market Vendors (336/mo): Jan 350, Feb 408 , March 521 , April , May , June , July , Aug , Sept ,Oct , Nov , Dec
		36 Pavillion Rentals for the year: Jan 3, Feb 5, March 3, April , May , June , July , Aug. , Sept , Oct , Nov , Dec
		12 Self-generated ODM events: Jan 0, Feb 1, March 1, April , May , June , July ., Aug. , Sept , Oct , Nov , Dec
		Provide 2 Vendor Workshops a Year:
N/A TBD		



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Our team met with Marion County administration to discuss foreign trade zones. We are exploring the feasibility of an FTZ for existing employers and how an FTZ could help attract new business to the Ocala Metro.

In preparation for the upcoming SelectUSA Investment Summit, I setup 5 pre-conference meetings with international businesses that are interested in investing in the US. The companies are based in Japan, Pakistan, Canada, and Egypt. SelectUSA is the preeminent event for FDI (foreign direct investment) and a great opportunity to showcase the Ocala Metro across the globe.

Circularix held their first Hiring Event with the help of CareerSource CLM. Applicant turnout was very positive and they hired ten new team members and began training and onboarding this month. They are scheduled to begin production soon and ramp up hiring as necessary. 28 new jobs created and \$25 million in capital investment.

I attended the Heart of HR Conference at OTOW. This annual event brings together HR professionals, work force development, legal updates, and various technology solutions to discuss best practices. Event facilitated by CareerSource CLM, OHRMA, and others.

Our team is fielding a constant stream of project leads from SelectFlorida, industrial brokers, developers, and end users. This level of activity is very positive and bodes well for the future of the Ocala Metro.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Attended the Business of Biotech Conference with Bio Florida at the Moffitt Cancer center at USF Campus with 300+ life science and oncology experts. Great Follow up with a research company and the Moffitt group looking for Ocala Metro Connections.

Attended the Celebration of Biotech at the Momentum labs in Alachua with Bio Florida. Local Injection Mold Manufacturer Artemis Plastics was a key vendor at the event. Great connections with developers and life science companies looking at relocation or expansion in the state of Florida. Attraction efforts underway with follow up meetings.

Hosted the CEO of HealthTrek in the Ocala Metro for a tour of sites and discussions around Life Science projects, including the current available property at the Ocala Int. Airport.

Project Helix Proposal for a non-disclosed life science project under way.

Attended the Bio Florida Government Affairs Committee mid-session briefing. Hosted a special webinar for the CEP Healthcare Council on the Enhanced Premium Tax Credits. Attended the First North Florida Bio Florida Monthly Meeting.



Bryce

Director of
Business
Development

Business Development

LLH had 1,724 Visit this month.

We submitted 3 RFT's this month. Project Vimana Alta (Aerospace), Project Cast (Manufacturing), and Project Blanco followed up with interest in a site. They are scheduling a site visit in the coming weeks.

I attended the Food and Beverage Manufacturing conference in Tampa. Met several good consultants in the space with follow-up meetings scheduled.

Shared LinkedIn post regarding local Entrepreneur programs, changed within the organization, and the Youth Business Plan competition.

Updated Sites & Buildings as necessary.



**Open
Position**

Director Of
Advocacy &
Talent
Development

Talent Development & Advocacy

Attended (4) Government Meetings or Workshops: None in February

Host Quarterly Workshops / Roundtables on Business Issues: None in February. Working on a follow up to Child Care Tax Credit for March.

NOTE: CXO attended Florida Chamber Fly-In February 9-10. Presentations & discussion with various legislators and cabinet members. Legislative Session begins March 4th.



**Evelyn
Reyes**

VP, Business
Creation

Business Creation

Secured 14 lenders for OMCF Lender Matchmaking event in May

Hosted how to created a business plan - Hablemos De Negocios

Attended Gainesville Opportunity Fair.

Attended How to do business with Orange County

Attended Luncheon with Florida Hight Tech Coridor.



Jessica Michel

Director of
Business Creation

Power Plant Incubator

Power Plant Business Incubator and IMPACT Business Incubator Occupancy: 72% New IMPACT Incubator Partner Joined - Ocala Insurance Group. 3 offices available at IMPACT (50%) & 3 offices available in PPBI

Community Outreach: Attended CF Business Advisory Meeting. Gave PPBI Tour to Florida High Tech Corridor. Attending UF Opportunity Fair.

Content Creation: Updated EIR, FastTrac and ICE House Flyers for 2025. Finalized Marketing for OMCF. Finalizing Marketing for Chamber of the year submission.

Social Media/ website: Added flyers and events to website with videos. Total Audience grew to 2,192 — that's a 29-person increase from March! Website traffic held strong with 384 visits, showing sustained interest in our programs. Facebook reached 1,219 followers, while Instagram climbed to 366, and LinkedIn hit 223 — consistent growth across all platforms! This steady momentum shows our message is reaching more entrepreneurs, partners, and community members every month

Programming: Finalizing Speakers for last two roundtables of 2025



Freddie Morris

Director of
Entrepreneurship
Services

2nd Stage Businesses

Attended - Orange County Minority Certification workshop.

Hosted the 2025 Marion County Youth Business Plan Competition: 29 Applicants, 5 finalists, 3 Winners

Hosted Entrepreneur in Residence Series for the Month of April (Speaker: Michael Kind of SCORE, Topic: Marketing Strategies)

Graduated First Cohort of the Ice House Entrepreneurial Mindset Course (10 week Course)

Had over 90 attendees at Travel Version of Kaufman's 1 Million Cups (Hosted at Midtown station)



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): HDG Legacy, AutoZone, Gratitude & Compassion, VyStar Credit Union, Advanced Welding, AdventHealth, Ameris Bank, Cardinal LG, Jumbolair, Florida Credit Union, Horse Farms Forever, McLauchlin & Co, Neighborhood Storage, Rock The Country, Seacoast Bank, Signature Brands, Sonic, OTOW, Campus USA, Benmar Construction, First Florida Bank.

Executive Partner Events (10/yr): Our next Biannual Chairman's Lunch will be held May 8th. Our next CEO Network Reception will be held May 21st.

Executive Tier Introductions: HDG Legacy/Hilton Ocala, Pat Myers Electric/Fifth Third Bank, Ameris Bank/HCA Florida Ocala Hospital, Fifth Third Bank/Swamp Dog, HDG Legacy, Pat Myers Electric, Sunrise Landscape/Hilton Ocala.

Sponsorships (\$260K/yr): CEP Entrepreneurial Learning Academy (HDG Legacy), June BAH (Paddock Mall), Networking University (The Vines Hospital), PPBI Training Room (SouthState Bank).

CEP 101s (200 attend./yr): 21 attendees in April.



Andrea Bailey

Director of
Business Services

Leadership & Education

Tuesday Talks > April 1: Team Building with Wise Leadership (22 CEP partners)

Friday Talks > April 25: Are you a HENRY with Ergle Financial (8 CEP partners)

Leadership Ocala Marion (LOM) > April 8: Agriculture Day and April 29: Economic Development Day (36 partners)

Leadership Ocala Marion Youth (LOMY) > April 7: Career Readiness at Signature Brands, April 21: Environment Session at Silver River Museum and April 28: LOMY Graduation (38 students)

exCEptional Mornings > April 16: Paul Sohl with High Tech Corridor (295 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 9 ribbon cutting/groundbreaking events

Partner Meetings: 20 meetings - 10 Business, , 5 Legacy, 4 Leadership, 1 Champion

Engagement Events (150 attendees/mo): approximately 157 attendees at events; 17 at President's Luncheon, 65 at Conexion Hispana, CEP Power Network, YBL, BBL, Networks, and Siletto Networks meetings; 39 at Catalytic Conversations; 75 at Beautiful Belleview

BCEP BAH/BotR (300/mo): Belleview events BotR Jan 28th @ 74 and BBAH Jan 25th @ 215

Outreach Activity (100/mo): Apprx 72 outreach, prospectivte, new, and established partners - check-ins! Ambassador meeting with MCP&R @ Livestock Pavilion, BHS Capstone Judging



Chris
Blakenship

Partner Relations
Associate

Partner Sales

New Partner Sales: 26 @ \$37,900 (1 Ent, 17 Bus, 2 Prem, 4 Leg, 1 Leadership, 1 Champion)

Cold Calls: 127 (25 to recently dropped partners)

New Partner Meetings: 30 (14 in person)

End of First Year Renewals: 9 @ \$10,400 (7 Bus, 1 Prem, 1 Leadership)

Partner Upgrades: 0



Ron Hipner

Partner Relations
Associate

Partner Sales

New Partner Sales: 0

Cold Calls: 2

New Partner Meetings: 2

End of First Year Renewals: 0



Matt
Wilkerson

Director of Partner
Success

Partner Engagement

Partner Visits (10/mo): 14 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 28 in-depth calls

Partner Videos (8/mo): 8 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list. **Some have requested a second video.**



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$3,100. (two Business, two Premium & one Legacy!) \$5000. - Straight Line Const- Upgrade from Bus to Leadership (+\$4400) and PAV from Business to Premium (\$600).

BCEP Cold Calls: 183 - six times canvassing and sharing invitations to events -canvassing with ambassadors!!

BCEP Partner Meetings: Four meetings with prospective partners and 32 meetings/visits with partners

BCEP Sponsorship: \$1850 for BotR Series Sponsor & April BotR

BCEP Other Engagement: hosted Beautiful Bellevue with 80 attendees, attended ACCE online training, Citra Fire Station Grand Opening for MC, Litter Task Force meeting, vendor at City of Bellevue Friday Foodie Fest (22), Ambassadors meeting at Royal Furniture (14), attended Bellevue Business Leaders (12), attended BNI w/ MP to invite to events, attended seven rc's with one being grand opening for Congresswoman Camack's new district office, joined Element Spin at Shepherds Lighthouse event, attended eM, attended ELC Luncheon, BCEP Ambassadors are calling all new partners to welcome them.



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 58 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 12 partners retained from 60-90+ days past due

Partner Upgrades & Value: PAV Painting & Home Improvements LLC: Business-->Premium = \$1200 HDG Legacy,
LLC: Chairman-->Founder's = \$30,000 Pinnacle Growth Solutions: Business-->Premium = \$1,200

Partner Events (Scheduling & posting): 52



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Meeting was held at World Equestrian Center in conjunction with Tri-Eagles Sales for an Equine 101 on the Budweiser Clydesdales with 68 partners present

Equine 101 & 201: Budweiser Clydesdales 101

Farm/Venue/School Visit: N/A

Equine Events and Community Meetings: Live Oak International, International Women's Day Equine Industry Theme and Budweiser Clydesdales Parade Downtown

Equine Industry Promotion: Wrote the equine newsletter, wrote the Everything Equine section for Ocala Magazine about Decoupling and created a video recap of the Equine Meeting to promote the Equine Initiative and the Budweiser Clydesdales downtown Parade



**Kimberly
Langley**

Executive
Assistant

Finance & Administration

Past Due Outreach - 51

Verify All New Partners Billing: April 2025

Pull Renewal Report - April 2025

Pay All Open Invoices Weekly - April 2025



Donna

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

Relocation guide packets sent within two weeks of receipt via phone or email

Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges (Weekly Basis) (50)

Resolve Partner Billing Discrepancies (Weekly Basis) (50)

Verify that all bills recorded in the accounting software have an invoice/support (Weekly Basis) (50)

Record credit card charges (Weekly Basis) (50)

Operational Meetings - Meet with Dean 4 times



Jessica Gilbert

VP Foundation
for CEP

Foundation

Grant Funding: TD grant applied for- CDFI funding recived (\$300,000)

n/a

Ended 2024 with total Foundation income of \$298,204.

n/a

The Catalyst had 22 downloads/views between all channels including YouTube.



Sullivan

Director of Video

Communications

Weekly Buzz Views: There were 4357 views for the Weekly Buzz this month well exceeding our stretch goal average of around 2650 views per month, with episodes breaking over 1K views on multiple platforms.

CEP on the Scene Views: There were 2257 views for CEP on the Scene this month.

POV Ocala Views: There were 1956 views for POV Ocala this month

Irregular Series Views (Closer Look, Leading):

Additional Internal Videos: tiktok



Arin

Director of
Communications &
Marketing

Communications

New Facebook Followers: 259 new monthly followers | 13,865 total followers

FACEBOOK Post Reach: 104.8k | **Engagement:** 3.4k | **Top posts:** Meeple Movers RC-97.2k, Bowlero RC-47.9K, Spires 27 RC-11.2K, Interim CEO, Tamars-7.8K, Ocala Dive Center RC-6.6K, April BAH-6.2K, Recharge Clinic RC-5.3K, DriveCenter RC-5.0kK | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach. Our top performing posts by VIEWS is consistly ribbon cutting celebrations.

FACEBOOK Group Reach: 8,168 | **INSTAGRAM Reach:** 10.4k (CEP), 17.3k (ODM), 0 (Equine), 334 (BellevueCEP)

Email Blast Open Rate: Open Rate: 45% | Overview: Over the past few months, we have reduced the volume of emails sent, resulting in a 6% increase in our open rate. This demonstrates that our emails are now more targeted and purposeful, with recipients engaging with them before deleting.

CEP Website Visits: Sessions: 7,054 | **Average Session:** 00:04:21 | **Overview:** Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared.

LinkedIn Followers & Post Impressions: 6,522 organic impressions with 84 new followers at 3,442 total. LinkedIn views continue to increase due to more frequent posts and our video series. LinkedIn stats are shared with Bryce and Bart.



**Dawn
Bowman**

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB 26,056 = 275+ IG 4,415 = 106+, March FB 26,197=141+ IG 4,579 = 164+, April FB 26253 =+56, IG 4745 =+166 May =+, IG =+, June =+, IG =+, July =+ IG =+, Nov IG Dec IG

Market Vendors (336/mo): Jan 350, Feb 408 , March 521 , April 402, May , June , July , Aug , Sept ,Oct , Nov , Dec

36 Pavillion Rentals for the year: Jan 3, Feb 5, March 3, April , May , June , July , Aug. , Sept , Oct , Nov , Dec

12 Self-generated ODM events: Jan 0, Feb 1, March 1, April 1, May , June , July ., Aug. , Sept , Oct , Nov , Dec

Provide 2 Vendor Workshops a Year:



N/A

TBD

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. On the left side, there is a vertical blue margin line. The paper appears to be a standard notebook or ledger page.



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Our team participated in the first Air Mobility Task Force meeting at the Ocala International Airport. 20 stakeholders discussed the past, current, and future operations at OIA, as well as the paths to bringing commercial air service to the community. Follow-up meeting scheduled for Summer.

I attended the SelectUSA Investment Summit and met with dozens of global businesses who are interested in investing in the US. The companies are based in Japan, Pakistan, Canada, Qatar, New Zealand, Egypt, and several others. SelectUSA is the preeminent event for FDI (foreign direct investment) and a great opportunity to showcase the Ocala Metro across the globe.

Circularix continues hiring team members with the help of CareerSource CLM. Equipment and machinery is being installed now with plans to begin production soon. 28 new jobs created and \$25 million in capital investment at the Airport Logistics Park.

The Withlacoochee Technical College hosted a tour to discuss their welding and electrical programs. These programs produce dozens of graduates each year and we are building a pipeline where the graduates can find employment in the Ocala Metro.

The Atrium Ocala Industrial Business Park held a Ribbon Cutting to celebrate this new industrial space in Ocala. These small industrial spaces will be offered for lease and are



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Targeted Marketing on LinkedIn- Lead Generation from target special industry for a look at the Insite Properties

Attended the Economic Summit, hosted by Cogent Bank at the Country Club Of Ocala. Great overview of the current and future state of the economy

Toured the SMA crisis center and met with the West Port Principle with Beth on Talent Development across Healthcare and logistics Programs

Hosted a call with the Quebec Liaison for Aviation and have set up calls with Insite and OIA for Aviation related development opportunities. Hosted Insite with Space Florida for development opportunities on their site.

Follow up call with Healthtrek CEO, around Site ready sites for Life Science company clients. Really focused on the opportunity to make all the City owned Airport land marketable for a Cluster.



Bryce

Director of
Business
Development

Business Development

LLH had 1,224 Visit this month.

We did not receive or submit any RFI's this month.

I did not attend any trade shows this month. Attended FEDC Annual Conference last month and connected with many partners and consultants around the state.

Our LinkedIn presence and impressions are growing due to our increased targeted marketed efforts.

Updated Sites & Buildings as necessary.



Beth McCall

Director Of
Advocacy &
Talent
Development

Talent Development & Advocacy

Government Meetings or Workshops: County Commssion Workshop May 6, 2025 / County Commission Public Hearing May 23, 2025 / School Board workshop May 22, 2025 / Meeting with Pete Lee May 15, 2025

Host Quarterly Workshops / Roundtables on Business Issues: / Attend meetings focusing on job creation: MTC Institutional Advisory Committee Meeting May 29, 2025

Construction Academy Meetings: Unable to attend May meeting

NEXTworking (Students): Planning meeting with Kathie Otte, Coordianator of CTE for MCPS May 13, 2025

NEXTworking (Industry): Meeting with Rodney Gutierrez from WEC May 16, 2025

NOTE: CXO attended Florida Chamber Foundation's Prosperity & Economic Opportunity Solutions Summit on May 29, 2025.



**Evelyn
Reyes**

VP, Business
Creation

Business Creation

Build relationships with 13 CEP Lending institutions. Launcged the first OMCF Lender Matchmaing Cohorts. 16 lenders and over 60 business owners.

Attended thePuerto Rican Summit in Orlando FL.

Create the OMCF Loan Rack Card to provide business owners with Information on our loans.

Met with Dominican Association from Gainsville. An effort to grow our foot print.

TD Bank leadership visited the IMPACT Incubator 5-12-2025. They are one of our IMPACT Incubator first investors.



**Jessica
Michel**

Director of
Business Creation

Power Plant Incubator

Power Plant Business Incubator and IMPACT Business Incubator Occupancy: 72%. 1 Prospect in the works for PPBI. 3 offices available at IMPACT (50%) & (2) offices available in PPBI

Community Outreach: Gave PPBI Tour to Ambleside school

Content Creation: Created and finalized marketing material for OMCF including designing tablecloth, banner and rack card. Completed IMPACT Incubator Video

Social Media/ website: Added flyers and events to website with videos. In May, the Power Plant Business Incubator's total audience grew to 2,203, marking an increase of 11 new followers across all platforms since April. Facebook saw a steady rise, reaching 1,234 followers, while Instagram gained 8 new followers to land at 374. LinkedIn also continued its growth trend, increasing to 227 followers. Website traffic came in at 368 visits for the month. While slightly lower than April's total, it remains significantly higher than earlier in the year, showing continued

Programming: Finalizing Speakers for last two roundtables of 2025



**Freddie
Morris**

Director of
Entrepreneurship
Services

2nd Stage Businesses

Assisted with FastTrac Class and Lender Matchmaking Event

Edited new video for PPBI, Launched PPBI Youtube

established Monthly 1MC Ocala Organizer Meetings | Average attendees: 58

Business Consults: 6

Support the operation OMCF Lender Matchmaking. (More than 60 companies and 16 banking service providers gathered for a day of work on financial education, banking, and credit opportunities. This successful event was held for the first time in Ocala.)



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Geo-Tech, Cogent Bank, AdventHealth, Ameris Bank, City of Ocala, Marion County, Encompass Health, Florida Credit Union, Jumbolair, Pyranha, R+L Global, Reveille Wealth Management, SouthState Bank, TV20, Zinnia Wealth Management, Citizens First Bank, Seacoast Bank, Church of Scientology, Benmar Construction, Affinity Tech Solutions, ACME Fill, Colomb Investment, Douglas Law, First Federal Bank, Main Street Realty, North Central FL Media, PNC Bank, PUDDLES, Ream Electric, ReMac Building Supply

Executive Partner Events (10/yr): Biannual Chairman's Lunch was held May 8th at Golden Ocala with 64 CEP Executive Tier Partners on hand. CEO Network Reception was held May 21st with 66 CEP Upper Tier Partners on hand.

Executive Tier Introductions: TV20/Club Adena, Ameris Bank/Pyranha, Reveille Wealth Management/Ameris Bank, Grandview Clydesdales/Ameris Bank, Zinnia Wealth Management/Club Adena, Cogent Bank/Pyranha, TV20/Chewy.

Sponsorships (\$260K/yr): Tuesday Talks (Cogent Bank), October BAH (Douglas Law Firm), Nextworks Talent Development Initiative (Optimum RV Year 4 of 4),

CEP 101s (200 attend./yr): 16 attendees in May.



Andrea Bailey

Director of
Business Services

Leadership & Education

Tuesday Talks > May 6: Squeak Media (16 CEP partners)

Friday Talks > May 30: Mindfulness and Awareness with RBOI (15 CEP partners)

Leadership Ocala Marion (LOM) > May 13: Culture Session (36 students) May 22: LOM Graduation with Alumni (118 guests)

Leadership Ocala Marion Youth (LOMY) > May 1: LOMY Interviews for new class - 90 applications, 37 accepted

exCEPtional Mornings > May 21: State of the County with Kathy Bryant (320 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 9 ribbon cutting/groundbreaking events

Partner Meetings: 19 meetings - 9 Business, 2 premium, 4 Legacy, 2 Leadership, 1 Champion, 1 Chairmans

Engagement Events (150 attendees/mo): approximately 130 attendees at events; 70 at Conexion Hispana, CEP Power Network, YBL, BBL, Vetworks, and Stiletto Networks meetings; Happiest Hour @ Black Sheep with Choice Maint 60 ppl

BCEP BAH/BotR (300/mo): Bellevue events BotR May 27th @ 70 and BBAH May 22nd @ 175

Outreach Activity (100/mo): Apprx 65 outreach calls - prospective, new, and established partner check-ins! Ambassador luncheon with Mayor Marciano big success



**Chris
Blakenship**

Partner Relations
Associate

Partner Sales

New Partner Sales: 18 @ \$11,700 (5 Ent, 9 Bus, 4 Prem)

Cold Calls: 123 (19 to recently dropped partners)

New Partner Meetings: 23 (13 in person)

End of First Year Renewals: 13 @ \$13,400 (10 Bus, 2 Prem, 1 Leadership)

Partner Upgrades: 0



Ron Hipner

Partner Relations
Associate

Partner Sales

New Partner Sales: 1

Cold Calls: 2

New Partner Meetings: 2

End of First Year Renewals: 3



**Matt
Wilkerson**

Director of Partner
Success

Partner Engagement

Partner Visits (10/mo): 15 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 24 in-depth calls

Partner Videos (8/mo): 14 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list. **Some have requested a second video.**



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$4,200. (three Business, two Premiums!)

BCEP Cold Calls: 129 - Five times canvassing and sharing invitations to events -canvassing with ambassadors!! (And sharing invites at Foodie Fest)

BCEP Partner Meetings: Eight meetings with prospective partners and 24 meetings/visits with partners.

BCEP Sponsorship: \$2850 for May BotR- SMA, May BBAH- AllSeasons & June BBAH - Joke Joint!

BCEP Other Engagement: Hosted Bellevue Business Works w/ SouthState Bank- 25 attendees, Canvassing the community sharing Beautify Bellevue and our events, Attended Founders Day and was a judge for the car show, Set up at Foodie Fest, Attended a County Commission meeting, PRAC meeting, Ocala Metro Business After Hours, Bellevue Business After Hours hosted by AllSeasons(175), BoJelleview on the Rise speaker was Robert Graff, MCFR (70), recorded a podcast with Valerie Daliey about BCEP.



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 58 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 12 partners retained from 60-90+ days past due

Partner Upgrades & Value: PAV Painting & Home Improvements LLC: Business-->Premium = \$1200
LLC: Chairman-->Founder's = \$30,000 Pinnacle Growth Solutions: Business-->Premium = \$1,200

HDG Legacy,

Partner Events (Scheduling & posting): 52



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Meeting was held at the Southeastern Livestock Pavilion in conjunction with the Bureau of Land Management for equine advocacy in a Mustang Adoption with refreshments by Element Spin Studio with 38 partners present

Equine 101 & 201: BLM Mustang 101

Farm/Venue/School Visit: Churchill Downs, NH Jones Elementary and Reddick Collier Elementary

Equine Events and Community Meetings: FTBOA Gala and the Kentucky Derby

Equine Industry Promotion: Wrote the equine enewsletter, wrote the Everything Equine section for Ocala Magazine about the Triple Crown and the significance of this for racing and assisted with equine industry career demos at two elementary schools



**Kimberly
Langley**

Executive
Assistant

Finance & Administration

Past Due Outreach - 51

Verify All New Partners Billing: April 2025

Pull Renewal Report - April 2025

Pay All Open Invoices Weekly - April 2025



Donna

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

Relocation guide packets sent within two weeks of receipt via phone or email

Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges

Resolve Partner Billing Discrepancies

Verify that all bills recorded in the accounting software have an invoice/support

Record credit card charges

Operational Meetings



Jessica Gilbert

VP Foundation
for CEP

Foundation

Grant Funding: Duke ED Grant awarded \$11,000

1 grant applications submitted

Ended 2024 with total Foundation income of \$298,204.

The Catalyst had 0 downloads and is being transitioned to a monthly radio broadcast with a much broader audience



Sullivan

Director of Video

Communications

Weekly Buzz Views: There were 4357 views for the Weekly Buzz this month well exceeding our stretch goal average of around 2650 views per month, with episodes breaking over 1K views on multiple platforms.

CEP on the Scene Views: There were 2257 views for CEP on the Scene this month.

POV Ocala Views: There were 1956 views for POV Ocala this month

Irregular Series Views (Closer Look, Leading):

Additional Internal Videos: tiktok



Arin

Director of
Communications &
Marketing

Communications

New Facebook Followers: 181 new monthly followers | 14,021 total followers. ****We hit 14K followers this month!**

FACEBOOK Post Reach: 42k | **Engagement:** 2.4k | **Top posts:** Jenkins Subaru Groundbreaking-14.2k, Happiest Hour Photos-13.9K, Rock the Country Giveaway-8.9K, Job Board Announcement-8.5K, Atrium Park RC-5.2K, Happiest Hour Flyer-4.3K, Leppo Rents RC-4.1K, Fifth Third RC-3.9k | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach. Our top performing posts by VIEWS is consistly ribbon cutting celebrations.

FACEBOOK Group Reach: 9,085 | **INSTAGRAM Reach:** 17.4k (CEP), 17.2k (ODM), 79 (Equine), 294 (BellevueCEP)

Email Blast Open Rate: Open Rate: 46% | **Overview:** Over the past few months, we have reduced the volume of emails sent, resulting in a 6% increase in our open rate. This demonstrates that our emails are now more targeted and purposeful, with recipients engaging with them before deleting.

CEP Website Visits: Sessions: 6,906 | **Average Session:** 00:04:17 | **Overview:** Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared.

LinkedIn Followers & Post Impressions: 5,510 organic impressions with 49 new followers at 3,493 total. LinkedIn views continue to increase due to more frequent posts and our video series. LinkedIn stats are shared with Bryce and Bart.



Dawn
Bowman

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB 26,056 = 275+ IG 4,415 = 106+, March FB 26,197=141+ IG 4,579 = 164+, April FB 26253 =+56, IG 4745 =+166 May26,457 =204+, IG =+, June =+, IG =+, July = + IG =+, Nov IG Dec IG

Market Vendors (336/mo): Jan 350, Feb 408 , March 521 , April 402, May 498 , June , July , Aug , Sept ,Oct , Nov , Dec

36 Pavillion Rentals for the year: Jan 3, Feb 5, March 3, April 7 , May 6 , June , July , Aug. , Sept , Oct , Nov , Dec

12 Self-generated ODM events:Jan 0, Feb 1, March 1, April 1, May 1 , June , July ., Aug. , Sept , Oct , Nov , Dec

Provide 2 Vendor Workshops a Year:



N/A
TBD



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Continued discussions with Project Drive and Project Flag. These possible expansion projects would create dozens of new high-wage manufacturing jobs in Ocala.

I facilitated a meeting with InSite Real Estate and Space Florida to discuss the financial tools they can provide to end users. Very productive and informative meeting.

I connected Project Drain with a local machine shop to discuss moving production from Canada to Ocala. Also connected them to Tom James to discuss CEP Partnership and introductions.

I met with Interstate Cargo to discuss their industrial property in Ocala. They opted not to build a facility in Ocala and would like to divest of the property. Our team added the brochure to our Sites & Buildings database.

I notified all of my contacts that my final day with the Ocala CEP is Friday, July 4, 2025. The Job Creation team will continue my efforts moving forward.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Targeted Marketing on LinkedIn- Lead Generation from target special industry for a look at the Insite Properties

Attended the Economic Summit, hosted by Cogent Bank at the Country Club Of Ocala. Great overview of the current and future state of the economy

Toured the SMA crisis center and met with the West Port Principle with Beth on Talent Development across Healthcare and logistics Programs

Hosted a call with the Quebec Liaison for Aviation and have set up calls with Insite and OIA for Aviation related development opportunities. Hosted Insite with Space Florida for development opportunities on their site.

Follow up call with Healthtrek CEO, around Site ready sites for Life Science company clients. Really focused on the opportunity to make all the City owned Airport land marketable for a Cluster.



Bryce

Director of
Business
Development

Business Development

LLH had 1,224 Visit this month.

We did not receive or submit any RFI's this month.

I did not attend any trade shows this month. Attended FEDC Annual Conference last month and connected with many partners and consultants around the state.

Our LinkedIn presence and impressions are growing due to our increased targeted marketed efforts.

Updated Sites & Buildings as necessary.



Beth McCall

Director Of

Advocacy &

Talent

Development

Talent Development & Advocacy

Government Meetings or Workshops /

Host Quarterly Workshops / Roundtables on Business Issues: June 9, Meeting with Principal Heather Guest of Belleview High School / June 16, Meeting with Principal Ginger Cruze of West Port High School /

Construction Academy Meetings: June 11, Meeting with Denise Alexander of MCBIA / June 12, MCBIA Construction Academy Meeting

NEXTworking (Students): June 12, Planning meeting with Jennifer Fryns, Gary Smallridge, Kathie Otte

NEXTworking (Industry): June 26, Florida Work Base Learning Advisory Meeting

NOTE: June 16, Attended Corporate Tax Round Table Discussion with Congress Woman Kat Cammack at R & L Carriers



Evelyn

Reyes

VP, Business

Creation

Business Creation

3 weeks medical leave

Help facilitate IMPACT Construction Academy



Jessica Michel
Director of
Business Creation

Power Plant Incubator

Power Plant Business Incubator Occupancy: 85% and IMPACT Business Incubator Occupancy: 83%. WvW Wifi joins the PPBI Incubator. Forged Right Staffing Joins IMPACT Business Incubator. 1 Prospect in the works for PPBI. 2 offices available at IMPACT & (2) offices available in PPBI

Community Outreach: Attended City of Ocala Vendor Fair and present the services of the PPBI
County Reverse Trade Show and presented the services of the PPBI with a booth setup. Attended

Content Creation: Created Power Plant Business Incubator Mid-Year Report

~~Website: Updated landing pages with current flyers. Social media: Our online reach continues to grow steadily across all platforms. As of June:~~
PPBI Facebook followers increased to 1,250, up from 1,234 in May.
PPBI LinkedIn reached 231 followers, continuing its monthly upward trend.
~~PPBI Instagram rose to 381 followers, adding 7 new followers in June~~

Programming: Finalizing Speakers for last two roundtables of 2025



Freddie Morris
Director of
Entrepreneurship
Services

2nd Stage Businesses

Conducted Entrepreneur in Residence Series focused on Business Law

Attended Start-up Space Webinar to improve our methods of analyzing metrics

Added 2 New Organizers to 1 Million Cups Ocala (Avg Attendance: 56)

Business Consults: 9

Attended Cogent Bank Economic Summit



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Jumbolair, Robb Harrington Real Estate, HDG Hotels, Ausley Construction, Angie Lewis State Farm, R+L Global, Pat Myers Electric, Wire3, Creative Springs, North Central Florida Media, Brookdale, Grandview Clydesdales, Seacoast Bank, Cogent Bank, Reveille Wealth Management, Benmar Construction, Douglas Law Firm, AdventHealth.

Executive Partner Events (10/yr): The next Executive Roundtable Lunch will be held Thursday, July 10th at the Reilly Arts Center Black Box. The next CEO Network Reception will be held July 30th at the Hilton Garden Inn Downtown.

Executive Tier Introductions: Sherman Mechanical/Haskell, Cheney Brothers/TV20, Cogent Bank/Hospice of Marion County, Cogent Bank/Aura Senior Placement Solutions, Ameris Bank/CareerSource, Duke Energy/HCA, Duke Energy/Reveille Wealth Management.

Sponsorships (\$260K/yr): Center For Innovation (Wire3), Executive Roundtable Lunch (Seacoast Bank).

CEP 101s (200 attend./yr): 13 attendees in May.



Andrea Bailey

Director of
Business Services

Leadership & Education

Tuesday Talks > June 3: Empath Health (15 CEP partners)

Friday Talks > June 27: LTC Technology (10 CEP partners)

Leadership Ocala Marion (LOM) > June - accepting applications

Leadership Ocala Marion Youth (LOMY) > May 1: LOMY Interviews for new class - 90 applications, 37 accepted

exCEptional Mornings > June 18: Duke Energy Economic Development Director (300 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 14 ribbon cutting/groundbreaking events

Partner Meetings: 14 meetings - 5 Business, 1 premium, 4 Legacy, 2 Leadership, 1 Founders

Engagement Events (150 attendees/mo): approximately 130 attendees at events; 70 at Conexion Hispana, CEP Power Network, YBL, BBL, Networks, and Stiletto Networks meetings; Happiest Hour @ Black Sheep with Choice Maint 60 ppl

BCEP BAH/BotR (300/mo): Belleview events BotR June 25th @ and BBAH June 27th @ 175

Outreach Activity (100/mo): Apprx 55 outreach calls - prospective, new, and established partner check-ins; attended Reverse Trade Show @Marion County; completed year 3 US Chamber Institute for Organization Management



Chris
Blakenship

Partner Relations
Associate

Partner Sales

New Partner Sales: 23 @ \$18,400 (1 Ent, 16 Bus, 5 Prem, 1 Leg)

Cold Calls: 118 (20 to recently dropped partners)

New Partner Meetings: 27 (15 in person)

End of First Year Renewals: 6 @ \$9,900 (4 Bus, 1 Leg, 1 Champ)

Partner Upgrades: 0



Ron Hipner

Partner Relations
Associate

Partner Sales

New Partner Sales: 1

Cold Calls: 2

New Partner Meetings: 2

End of First Year Renewals: 3



Matt
Wilkerson

Director of Partner
Success

Partner Engagement

Partner Visits (10/mo): 16 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 24 in-depth calls

Partner Videos (8/mo): 13 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list. **Some have requested a second video. Discussing a different approach moving forward for better response from partners.**



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$1,800. (three Business Partners!)

BCEP Cold Calls: 289 - Five times canvassing and sharing invitations to events -canvassing with ambassadors!! (And sharing invites at Foodie Fest)
Also specific outreach for Beautify Bellevue to share information.

BCEP Partner Meetings: Six meetings with prospective partners and 15 meetings/visits with partners.

BCEP Sponsorship: none

BCEP Other Engagement: Canvassing the community sharing Beautify Bellevue and our events, Bellevue Foodie Fest, PRAC meeting, exCEPtional Mornings, Bellevue Business After Hours hosted by Joke Joint & On the Go Mobile Advertising (230), Bellevue on the Rise speaker was Tra Williams (80), recorded a podcast with Andrea with Great Expectations Realty about BCEP, Bellevue Business Leaders meeting (10), monthly Bellevue CEP Ambassador meeting, attended six ribbon cuttings.



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 70 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 7 partners retained from 60-90+ days past due

Partner Upgrades & Value: None: \$0

Partner Events (Scheduling & posting): 61



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Meeting was held at the Southeastern Livestock Pavilion in conjunction with the Bureau of Land Management for equine advocacy in a Mustang Adoption with refreshments by Element Spin Studio with 38 partners present

Equine 101 & 201: BLM Mustang 101

Farm/Venue/School Visit: Churchill Downs, NH Jones Elementary and Reddick Collier Elementary

Equine Events and Community Meetings: FTBOA Gala and the Kentucky Derby

Equine Industry Promotion: Wrote the equine newsletter, wrote the Everything Equine section for Ocala Magazine about the Triple Crown and the significance of this for racing and assisted with equine industry career demos at two elementary schools



Open Position

Executive
Assistant

Finance & Administration



Donna

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

Relocation guide packets sent within two weeks of receipt via phone or email

Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges

Resolve Partner Billing Discrepancies

Verify that all bills recorded in the accounting software have an invoice/support

Record & reconcile credit card charges

Print monthly renewal letters and invoices to be sent out the first of every month



Jessica Gilbert

VP Foundation
for CEP

Foundation

Grant Funding: Duke ED Grant \$11,0000 - PNC Grant \$10,000

2 grant applications submitted

Ended 2024 with total Foundation income of \$298,204.

CEP First Friday with Audacy - June 27th with Ocala Design Group



Sullivan

Director of Video

Communications

Weekly Buzz Views: There were 3778 views for the Weekly Buzz this month well exceeding our stretch goal average of around 2650 views per month, with episodes breaking over 1K views on multiple platforms.

CEP on the Scene Views: There were 2257 views for CEP on the Scene this month.

POV Ocala Views: There were 1841 views for POV Ocala this month

Irregular Series Views (Closer Look, Leading): HDG

Additional Internal Videos: tiktok



Arin

Director of
Communications &
Marketing

Communications

New Facebook Followers: 175 new monthly followers | 14,167 total followers.

FACEBOOK Post Reach: 49k | **Engagement:** 3.8k | **Top posts:** Wildlife Works RC-18.7k, Culvers RC-14.4K, Revival Brick City Market RC-14K, Robb Harrison RC-12.5K, Marion County Airport RC-10.2K, Creative Springs RC-10.1K, National Donut Day-6.1K, June BAH Photos-5.6k | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach. Our top performing posts by VIEWS is consistly ribbon cuttings and event photos.

FACEBOOK Group Reach: 9,599 | **INSTAGRAM Reach:** 16.1k (CEP), 16.8k (ODM), 2 (Equine), 262 (BellevueCEP)

Email Blast Open Rate: Open Rate: 44% | **Overview:** Over the past few months, we have reduced the volume of emails sent, resulting in a 6% increase in our open rate. This demonstrates that our emails are now more targeted and purposeful, with recipients engaging with them before deleting.

CEP Website Visits: Sessions: 6,906 | **Average Session: 00:04:17** | **Overview:** Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared.

LinkedIn Followers & Post Impressions: 6,584 organic impressions with **45** new followers at **3,530** total. LinkedIn views continue to increase due to more frequent posts and our video series. LinkedIn stats are shared with Bryce and Bart.



**Dawn
Bowman**

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB 26,056 = 275+ IG 4,415 = 106+, March FB 26,197=141+ IG 4,579 = 164+, April FB 26,253 =+56, IG 4,745 =+166 May 26,457 =204+, IG =+, June 26,553=96+, IG 5027 = 282+, July = + IG =+, Nov IG Dec IG

Market Vendors (336/mo): Jan 350, Feb 408 , March 521 , April 402, May 498 , June 370, July , Aug , Sept ,Oct , Nov , Dec

36 Pavillion Rentals for the year: Jan 3, Feb 5, March 3, April 7 , May 6 , June 6, July , Aug. , Sept , Oct , Nov , Dec

12 Self-generated ODM events: Jan 0, Feb 1, March 1, April 1, May 1 , June 1 , July 0 ., Aug. , Sept , Oct , Nov , Dec

Provide 2 Vendor Workshops a Year:



N/A

TBD



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Attended the Duke Energy 101 Conference with fellow EDC colleagues, Site Selectors, Rail and Space Florida

Hosted Developers looking to expand on a project site in Ocala for Commercial Project.

Hosted the new business Development Partner from CPPI, looking at opportunities in the Ocala Metro for Development and build to suite options.

Project Genesis, coordinated call for new project for Ocala, to create an est. 160 jobs.

Continuing the attraction push to external markets with newly revamped materials and targeted campaigns.



Bryce Morrison

Director of
Business
Development

Business Development

LLH had 825 Visit this month.

We submitted 2 RFI's this month. Project Sink and Project Vertigo.

I did not attend any trade shows this month. Attended Electricity 101 with Duke Energy.

Our LinkedIn presence and impressions are growing due to our increased targeted marketed efforts. Several posts focused on our target industries.

Updated Sites & Buildings as necessary.



Beth McCall

Director Of
Advocacy &
Talent
Development

Talent Development & Advocacy

Government Meetings or Workshops / July 21, County Commission Public Hearing for the WEC Sports Complex / July 31, attended the Community Foundations Legislative wrap up with Jessica McClain and Representative Ryan Chamberlain

Host Quarterly Workshops / Round tables on Business Issues / Meet One-on-One with school and business leaders: July 8, Met with Interim Superintendent Dr. Danielle Brewer / July 9, met with Matt Johnson, principal of North Marion High School / July 23, lunch with Jennifer Fryns, VP of Workforce Development & Innovation for the College of Central Florida

Construction Academy Meetings:

NEXTworking (Students):

NEXTworking (Industry): July 8, Met with Rob Bowman of R&L Global Logistics and Ginger Cruze, principal of WPHS to discuss R&L partnering with the WPHS Logistics Program / July 9, Lunch with Sarah Thacker, Senior Director of Sales for WEC, to discuss WEC partnership for NEXTworking / July 21, met with Marni Tovsen, Chief Human Resource Officer for Optimum RV, to discuss Optimum's

NOTE: July 16, met with Congressman Randy Fines staff to begin planning the Congressman's Meet & Greet / July 23, attending Florida Chamber Future of Work Florida Webinar / July 23, Met with Pete Lee to tour city sites with prospective developer



**Evelyn
Reyes**

VP, Business
Creation

Business Creation

Attended the Latinas in Tech event in Tampa Florida.

Met with the president of the Puerto Rican Chamber of Orlando

OMCF-Created a contribution card to hand out to Potencial funders of the OMCF.

Met with SBA Florida Regional Manager to discuss new opportunities for OMCF.



Jessica Michel
Director of
Business Creation

Power Plant Incubator

Power Plant Business Incubator Occupancy: 85% and IMPACT Business Incubator Occupancy: 83%. 1 Prospect in the works for PPBI. Art Song and Story Palace Graduates PPBI this month. 2 offices available at IMPACT & (2) offices available in PPBI

Community Outreach: Met with Vet>Works group to reengage and are now meeting at IMPACT Business Incubator for meetings. Set up to speak at Girl Night Out Networking event on August 19.

Content Creation: Created OMCF Pledge Card and Invite.

Website: Creating a Business Consulting Landing Page for PPBI website to separate PPBI Incubator Programming from Free biz consults. In July, our digital platforms continued to engage a strong audience:

PPBI Facebook reached 1,254 followers.

PPBI LinkedIn grew slightly to 232 followers.

PPBI Instagram rose to 398 followers.

Power Plant Website saw 304 visits.

Total Audience across all platforms stands at 2,188.

While overall audience numbers dipped slightly from June (2,296), engagement remains steady and shows consistent growth over the year. Continued outreach and content efforts will help drive numbers upward into Q3.

Programming: Separated our Power Hour meetings into two meetings between IMPACT and PPBI with both meeting the 1st Thursday of each month.



Freddie Morris
Director of
Entrepreneurship
Services

2nd Stage Businesses

Assisted with facilitating the start of Fast Trac's 2nd Cohort and presented a several sessions.

Attended Kauffman's Fast Trac & 1 Million Cups Summit in Kansas City, MO

Created Marketing Videos for Fast Trac, 1 Million Cups, & our YouTube

Community outreach efforts, met with Workspace Collective to discuss a referral program for entrepreneurs who aren't going to become Incubator Partners.

Created LinkedIn for 1 Million Cups and provided proper training opportunities for organizers



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Optimum RV, James Moore, Engel & Volkers, Seacoast Bank, Clymer Farner Barley, CPPI, Cogent Bank, HCA Florida Ocala Health, Sherman Mechanical, Tri-Eagle Sales, WEC, Roam Electric, Wilmek Construction, Hilton Ocala, Hilton Garden Inn Downtown, Horse Farms Forever, Ark Hospitality, North Central Florida Media Group, Batterbee Roofing, Bart Blessing State Farm, Angie Lewis State Farm, Pat Myers Electric, Wire3, Grandview Clydesdales

Executive Partner Events (10/yr): Executive Roundtable Lunch was held at The Reilly's Black Box on July 10th with 64 CEP "Executive Tier" Partners on hand. CEO Network Reception was July 30th at the Hilton Garden Inn Downtown with 66 CEP "Executive Tier" Partners in attendance.

Executive Tier Introductions: Clymer Farner Barley/Sherman Mechanical, CPPI/Seacoast Bank, CPPI/Bart Blessing Insurance, Wilmek Construction/Bart Blessing Insurance, Grandview Clydesdales/SouthState Bank, Cogent Bank/CPPI, Hilton Ocala/Seacoast Bank,

Sponsorships (\$260K/yr): Brookdale (Nov. BAH), Gulf Atlantic Bank (Dec. BAH)

CEP 101s (200 attend./yr): 8 Attendees in July.



Andrea Bailey

Director of
Business Services

Leadership & Education

Tuesday Talks > July 8: Jim Bowie with Roxtar Consulting (20 CEP partners)

Friday Talks > July 25: NEXTworking with Beth McCall (5 CEP partners)

Leadership Ocala Marion (LOM) > July - accepting applications

Leadership Ocala Marion Youth (LOMY) > May 1: LOMY Interviews for new class - 90 applications, 37 accepted

exCEptional Mornings > July 16: Bill Gladson State Attorney (280 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 9 ribbon cutting/groundbreaking events

Partner Meetings: 19 meetings - 6 Business, 2 premium, 6 Legacy, 3 Leadership, 2 Founders

Engagement Events (150 attendees/mo): approximately 85 attendees at events; 70 at Conexion Hispana, CEP Power Network, YBL, BBL, Vetworks, and Stiletto Networks meetings, and President's Luncheon - 85

BCEP BAH/BotR (300/mo): Belleview events BotR July 24th @ and BBAH July 26th @ 260

Outreach Activity (100/mo): Apprx 54 outreach calls - prospective, new, and established partner check-ins;



Chris
Blakenship

Partner Relations
Associate

Partner Sales

New Partner Sales: 17 @ \$19,700 (4 Ent, 10 Bus, 1 Leg, 2 Lead)

Cold Calls: 112 (15 to recently dropped partners)

New Partner Meetings: 20 (13 in person)

End of First Year Renewals: 11 @ \$8,800 (1 Ent, 7 Bus, 2 Prem, 1 Leg)

Partner Upgrades: 0



Ron Hipner

Partner Relations
Associate

Partner Sales

New Partner Sales: 1

Cold Calls: 2

New Partner Meetings: 2

End of First Year Renewals: 3



Matt
Wilkerson

Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 13 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 33 in-depth calls

Partner Videos (8/mo): 9 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list. **Some have requested a second video. Discussing a different approach moving forward for better response from partners.**



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$1,800. (three Business Partners!)

BCEP Cold Calls: 208 - Four times canvassing and sharing invitations to events -canvassing with ambassadors!! (And sharing invites at Foodie Fest) Also specific outreach for Beautify Bellevue to share information.

BCEP Partner Meetings: 5 meetings with prospective partners and 12 meetings/visits with partners.

BCEP Sponsorship: \$6350

BCEP Other Engagement: Thank you outreach to PME with ambassadors, Canvassing the community sharing Beautify Bellevue and our events, Bellevue Foodie Fest, PRAC meeting, exCEptional Mornings, Bellevue Business After Hours hosted by FleetForce Truck Driving (150), Bellevue on the Rise speaker was Dr. Daniel Brewer with MCPS- (80), Bellevue Business Leaders meeting (8), monthly Bellevue CEP Ambassador meeting, Attended the County budget hearings, Met with Commissioner McClain, Met with Congressman Fines staff, attended four ribbon cuttings.



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 93 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 12 partners retained from 30+ days past due

Partner Upgrades & Value: Jenny E Photography Business-->Legacy \$2500 Sheltering Hands Entrepreneur-->Business \$600 TomL Publishing Business-->Legacy \$2500

Partner Events (Scheduling & posting): 54



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Meeting was held at the Southeastern Livestock Pavilion in conjunction with the Bureau of Land Management for equine advocacy in a Mustang Adoption with refreshments by Element Spin Studio with 38 partners present

Equine 101 & 201: BLM Mustang 101

Farm/Venue/School Visit: Churchill Downs, NH Jones Elementary and Reddick Collier Elementary

Equine Events and Community Meetings: FTBOA Gala and the Kentucky Derby

Equine Industry Promotion: Wrote the equine newsletter, wrote the Everything Equine section for Ocala Magazine about the Triple Crown and the significance of this for racing and assisted with equine industry career demos at two elementary schools



Open Position

Executive
Assistant

Finance & Administration



**Donna
Marseco**

Director of First
Impressions

Operations

Monthly Invoices & Statements sent out prior to the last day of the month.

New Partner entries completed day of application receipt with payment, and new partner packets mailed within two weeks

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Paid Renewal packets mailed within two weeks of receipt of updated list(s)

Touchpoint mailed by month end: 6 mo new partner, 10 mo new partner, 1 Mo dropped and 6 Mo dropped



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges

Resolve Partner Billing Discrepancies

Verify that all bills recorded in the accounting software have an invoice/support

Record & reconcile credit card charges

Print monthly renewal letters and invoices to be sent out the first of every month



Jessica Gilbert

VP Foundation
for CEP

Foundation

Grant Funding: Duke ED Grant \$11,0000 - PNC Grant \$10,000

2 grant applications submitted

Ended 2024 with total Foundation income of \$298,204.

CEP First Friday with Audacy - June 27th with Ocala Design Group



Sullivan
Hogan

Director of Video

Communications

Weekly Buzz Views: There were 3778 views for the Weekly Buzz this month well exceeding our stretch goal average of around 2650 views per month, with episodes breaking over 1K views on multiple platforms.

CEP on the Scene Views: There were 2257 views for CEP on the Scene this month.

POV Ocala Views: There were 1841 views for POV Ocala this month

Irregular Series Views (Closer Look, Leading): HDG

Additional Internal Videos: tiktok



Arin
Conrad

Director of
Communications &
Marketing

Communications

New Facebook Followers: 141 new monthly followers | 14,281 total followers.

FACEBOOK Post Reach: 46.6k | **Engagement:** 3k | **Top posts:** Magnolia Soap RC-20.6k, Mortgages with Brittany RC-14.1K, COTY Finalist Photos-13.4K, Optimize U RC-13.2K, DZ Corp RC-9K, AdventHealth Primary Care RC-8.4K, Central City Realtyb RC-8.2K, July BAH Photos-6.4k | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach. Our top performing posts by VIEWS is consistly ribbon cuttings and event photos.

FACEBOOK Group Reach: 8,027 | **INSTAGRAM Reach:** 24k (CEP), 31.1k (ODM), 22 (Equine), 551 (BellevueCEP)

Email Blast Open Rate: Open Rate: 46% | Overview: Over the past few months, we have reduced the volume of emails sent, resulting in a 6% increase in our open rate. This demonstrates that our emails are now more targeted and purposeful, with recipients engaging with them before deleting.

CEP Website Visits: Sessions: 6,906 | Average Session: 00:04:17 | Overview: Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared.

LinkedIn Followers & Post Impressions: 8,330 organic impressions with 47 new followers at **3,580** total. LinkedIn views continue to increase due to more frequent posts and our video series. LinkedIn stats are shared with Bryce.



**Dawn
Bowman**

Director
Ocala Downtown
Market

Ocala Downtown Market

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12 Self-generated ODM events: Jan 0, Feb 1, March 1, April 1, May 1 , June 1 , July 0 ., Aug. , Sept , Oct , Nov , Dec

Provide 2 Vendor Workshops a Year:



N/A

TBD



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Attended the BIO Florida NE Chapter event in Jacksonville at the Mayo Clinic, touring there new expansion project. Connecting with Life Science companies.

Participated in a market visit with the Florida Blue Corporate team, presenting the state of the region to there team at the college of central florida.

Hosted Q3 Council meeting with a Legislative Panel for the CEP Heatlhcare council with Senator Stan McClain, Rep. Judson Sapp and Rep. Ryan Chamberlain. Overwiewing the current legislative healthcare intiatives and opening the floor to the council to hear needs for 2026 Sessions. With 48 attendees.

Hosted, Duke, Senior Economic Dev. Cor. Alex Sanchez for a business development meeting, updates and project activity opportunities.

Project activity continues to move forward for the fall.



Bryce Morrison

Director of
Business
Development

Business Development

LLH had 930 Visit this month.

We submitted 3 RFI's this month. Project Fast, Project Mars, and Project Trivio 1.

I did not attend any trade shows this month.

Our LinkedIn presence and impressions are growing due to our increased targeted marketed efforts. Several posts focused on our target industries.

Updated Sites & Buildings as necessary.



Beth McCall

Director Of
Advocacy &
Talent
Development

Talent Development & Advocacy

Government Meetings or Workshops: August 19, County Commission Meeting /

Host Quarterly Workshops / Round tables on Business Issues / Meet One-on-One with school and business leaders: August 6, Meeting with Jason Jacobs, principal at Lake Weir High School / August 13, Meeting with Jason Jacobs, principal of Lake Weir High School, and Denise Alexander, Executive Director of MCBIA /

Construction Academy Meetings: August 14 / MCBIA Construction Academy Committee meeting /

NEXTworking (Students):

NEXTworking (Industry): August 19, Meeting with Douglas Cone III and Mel Rappleyea to discuss NEXTworking event / August 25, Meeting about NEXTworking event at WEC with Lisa Labo, WEC Director of Catering, Conference Services and Events / Meeting with Lt Paul Bloom of MCSO about NEXTworking

NOTE:



**Evelyn
Reyes**

VP, Business
Creation

Business Creation

Attended the Black & Hispanic Summit In Tampa.

Attended the SBDC Conference in Tampa

Attended the CEP Executive Luncheon

Attended Puerto Rican Chamber Of Central FL. Forum in Kissimmee FL.

Secured Hispanic Heritage Month Sponsor



**Jessica
Michel**

Director of
Business Creation

Power Plant Incubator

Power Plant Business Incubator Occupancy: 95% and IMPACT Business Incubator Occupancy: 83%. We Welcome H.E.R.O Mental Health into PPBI in suite 109. 2 offices available at IMPACT & 1 office available in PPBI

Community Outreach: Presented to GNO Networking Group about the PPBI Resources and Services on August 19th

Content Creation: Updated OMCF Pledge Card and Invite. Created Donation Form for OMCF. Updated Construction Academy Flyers for the end of the year.

Website: Business Consulting Landing Page is live for PPBI. Working on Revamping website with new look. From January to August, our total audience on social media grew by 15%, from 1,873 to 2,155, underscoring consistent brand visibility and community engagement across channels.

Programming: Separated our Power Hour meetings into two meetings between IMPACT and PPBI with both meeting the 1st Thursday of each month. Finished up some Partner 1 on 1.



**Freddie
Morris**

Director of
Entrepreneurship
Services

2nd Stage Businesses

Began our second cohort of the Ice House Entrepreneurship Mindset Course

Attended SBDC Small Business Summit in Tampa Florida

Organized and Conducted our Black Business Month Workshop at the Mary Sue Rich Center with over 60 registered and in attendance

Community outreach efforts, met with numerous Black Business Owners around the city to let them know of our FREE Resources

Conducted the Entrepreneur in Residence Series and had over 40 registered and in attendance



**Norman
Velasquez
Alvarez**

Director of
IMPACT
Entrepreneur

Impact Initiative

Four (4) FastTRAC sessions during the month of August 2025, with 20 entrepreneurs and business owners registered to date. At the Mary Sue Rich Community Center.

Attended and assisted with Traveling 1MC, which took place at the Belleview Community Center

Attended SBDC Small Business Summit in Tampa Florida

Attended and assisted with the Black Business Month Workshop in the Mary Sue Rich Center

Conducted "Hablemos De Negocios" where we had over 30 business owners registered and in attendance



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Advanced Welding, SouthState Bank, Angie Lewis State Farm, Benmar Construction, Colomb Investment Management, Bailey Building, Douglas Law Firm, N. Central Florida Media Group, Gallagher, WEC, Pixelemm, Hilton Hotel, Seacoast Bank, Wilmek Construction, City of Ocala, TV20, Pro Realty of Ocala, Roam Electric, CPPI, Grandview Clydesdales.

Executive Partner Events (10/yr): Executive Roundtable Lunch was held at The Reilly's Black Box on August 27th, with 54 CEP "Executive Tier" Partners on hand.

Executive Tier Introductions: Clymer Farner Barley/Wawa, CPPI/Advanced Welding, Grandview Clydesdales/Colomb Investment Management, Bailey Bldg & Construction/Douglas Law Firm, Advanced Welding/Wilmek, Hilton/Colomb Investment Management, Hilton/SouthState Bank, Hilton/Seacoast Bank, Bailey Bldg & Construction/Gallagher.

Sponsorships (\$260K/yr): Pat Myers Electric (Horse Capital Parade Presenting Sponsor), Angie Lewis State Farm (2 NextWorking events), Smash Wraps (Jumbolair Equine Event), Wilmek Construction (Horse Capital Parade).

CEP 101s (200 attend./yr): 15 attendees



Andrea Bailey

Director of
Business Services

Leadership & Education

Tuesday Talks > August 5: Matt Leibfried with City of Ocala (22 CEP partners)

Friday Talks > August 29: Gary Wise - Wise Leadership (CEP partners)

Leadership Ocala Marion (LOM) > August - Application Deadline August 5 - Interviews on August 8 - Accepted 37 students. August 28: Orientation and DISC profiles

Leadership Ocala Marion Youth (LOMY) > August 25: LOMY Parent Student Orientation

exCEptional Mornings > August 20: Dr. Jim Henningsen, President, CF (317 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 9 ribbon cutting/groundbreaking events

Partner Meetings: 19 meetings - 6 Business, 2 premium , 6 Legacy, 3 Leadership, 2 Founders

Engagement Events (150 attendees/mo): approximately 190 attendees at events; 70 at Conexion Hispana, CEP Power Network, YBL, BBL, Vetworks, and Stiletto Networks meetings, and President's Luncheon PLUS a Happiest Hour w/Roam Elec

BCEP BAH/BotR (300/mo): Belleview events BotR Aug 26th @ and BBAH Aug 28th @ 270

Outreach Activity (100/mo): Apprx 73 outreach calls - prospective, new, and established partner check-ins;



**Chris
Blakenship**
Partner Relations
Associate

Partner Sales

New Partner Sales: 19 @ \$25,900 (4 Ent, 8 Bus, 2Prem, 3 Leg, 2 Lead)

Cold Calls: 129 (10 to recently dropped partners)

New Partner Meetings: 30 (16 in person)

End of First Year Renewals: 13 @ \$12,600 (1 Ent, 8 Bus, 1 Prem, 3 Leg)

Partner Upgrades: 0



Ron Hipner
Partner Relations
Associate

Partner Sales

New Partner Sales: 1

Cold Calls: 2

New Partner Meetings: 2

End of First Year Renewals: 3



**Matt
Wilkerson**
Director of Partner
Success

Partner Engagement

Partner Visits (10/mo): 13 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 33 in-depth calls

Partner Videos (8/mo): 9 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list. **Some have requested a second video. Discussing a different approach moving forward for better response from partners.**



Diane Thomason
Partner Relations
Associate

Partner Sales

New Partner Sales: 1 @ \$5,000

Cold Calls: 4

New Partner Meetings: 1

End of First Year Renewals: 0



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$2,400. (FOUR Business Partners!)

BCEP Cold Calls: 198 - Six times canvassing and sharing invitations to events (Congressman Fine Meet&Greet, BotR, BBAH) -canvassing with ambassadors!! (And sharing invites at Foodie Fest) Also specific outreach for Beautify Bellevue to share information.

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Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 101 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 20 partners retained from 30+ days past due

Partner Upgrades & Value: None = \$0.00

Partner Events (Scheduling & posting): 52



Louisa Barton

Director of Equine
Engagement

Equine Engagement

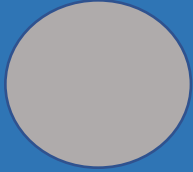
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Open Position

Chief of Staff &
Executive
Assistant

Finance & Administration



Donna

Director of First
Impressions

Operations

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Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges

Resolve Partner Billing Discrepancies

Verify that all bills recorded in the accounting software have an invoice/support

Record & reconcile credit card charges

Print monthly renewal letters and invoices to be sent out the first of every month



Jessica Gilbert

VP Foundation
for CEP

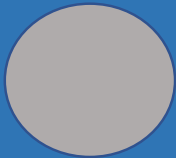
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Grant Funding: Duke ED Grant \$11,0000 - PNC Grant \$10,000

2 grant applications submitted

Ended 2024 with total Foundation income of \$298,204.

CEP First Friday with Audacy - August 1st with Justin Morton - Sonic --- Renee Gunther (Sept)



OPEN POSITION

Visual Media

Communications

Weekly Buzz Views: There were 3,646 views for the Weekly Buzz this month well exceeding our stretch goal average of around 2650 views per month, with episodes breaking over 1K views on multiple platforms.

CEP on the Scene Views: Paused

POV Ocala Views: There were 1770 views for POV Ocala this month

Irregular Series Views (Closer Look, Leading): HDG Founder's Club Video

Additional Internal Videos:



Arin

Director of
Communications &
Marketing

Communications

New Facebook Followers: 141 new monthly followers | 14,281 total followers.

FACEBOOK Post Reach: 46.6k | **Engagement:** 3k | **Top posts:** Magnolia Soap RC-20.6k, Mortgages with Brittany RC-14.1K, COTY Finalist Photos-13.4K, Optimize U RC-13.2K, DZ Corp RC-9K, AdventHealth Primary Care RC-8.4K, Central City Realtyb RC-8.2K, July BAH Photos-6.4k | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach. Our top performing posts by VIEWS is consistly ribbon cuttings and event photos.

FACEBOOK Group Reach: 8,027 | **INSTAGRAM Reach:** 24k (CEP), 31.1k (ODM), 22 (Equine), 551 (BellevueCEP)

Email Blast Open Rate: Open Rate: 46% | Overview: Over the past few months, we have reduced the volume of emails sent, resulting in a 6% increase in our open rate. This demonstrates that our emails are now more targeted and purposeful, with recipients engaging with them before deleting.

CEP Website Visits: Sessions: 6,906 | **Average Session:** 00:04:17 | **Overview:** Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared.

LinkedIn Followers & Post Impressions: 8,330 organic impressions with 47 new followers at **3,580** total. LinkedIn views continue to increase due to more frequent posts and our video series. LinkedIn stats are shared with Bryce.



Dawn
Bowman

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB 26,056 = 275+ IG 4,415 = 106+, March FB 26,197=141+ IG 4,579 = 164+, April FB 26,253 =+56, IG 4745 =+166 May 26,457 =204+, IG =+, June 26,553=96+, IG 5027 = 282+, July 26,656=103+,IG 5,104 =77+ , Aug 26,775=119+ IG5,255 =151+, Nov IG Dec IG

Market Vendors (336/mo): Jan 350, Feb 408 , March 521 , April 402, May 498 , June 370, July 392, Aug 523, Sept ,Oct , Nov , Dec

36 Pavillion Rentals for the year: Jan 3, Feb 5, March 3, April 7 , May 6 , June 6, July 10, Aug.12, Sept , Oct , Nov , Dec

12 Self-generated ODM events:Jan 0, Feb 1, March 1, April 1, May 1 , June 1 , July 0 ., Aug. 1, Sept , Oct , Nov , Dec

Provide 2 Vendor Workshops a Year:



N/A

TBD



**Jessica
Michel**

Director of
Business Creation

Power Plant Incubator

Power Plant Business Incuabtor Occupancy: 95% and IMPACT Buisness Incubator Occupancy: 2 offices available at IMPACT & 1 office availble in PPBI

Community Outreach: Spoke to FastTrac class for graduation. Attended Level Up Lakeland event for small businesses

Content Creation: Updated and finalized rack card and donation form for OMCF. Created Hispanic Heritage month flyer.

Website: Updating home page with new layout. Our digital presence continued to expand through September, with steady growth across platforms: PPBI Facebook grew to 1,297 followers, adding 19 since August. PPBI LinkedIn increased to 239 followers. PPBI Instagram rose to 420, maintaining its strong growth trend. Power Plant Website traffic improved to 243 visits, up from 226 in August. Total Digital Audience across all platforms is now 2,199, surpassing the 2,100 milestone for the year. From January to September, our audience grew by 326 people (+17% increase) — showing strong, consistent progress in visibility and community reach.

Programming: Separated our Power Hour meetings into two meetings between IMPACT and PPBI with both meeting the 1st Thursday of each month. Finished up some Partner 1 on 1.



**Freddie
Morris**

Director of
Entrepreneurship
Services

2nd Stage Businesses

Conducted 5 Ice House Entrepreneurial Mindset Course Sessions @ the IMPACT Incubator

Hosted the Kauffman Foundation as they visited Ice House, 1MC & Fast Trac

Celebrated 8 Years of 1 Million Cups Ocala

Assisted with IMPACT Construction Academy

Conducted the Entrepreneur in Residence Series and had over 45 registered and in attendance



**Norman
Velasquez
Alvarez**

Impact Initiative

Two (2) FastTRAC sessions during the month of September 2025, with 22 entrepreneurs and business owners registered to date. At the Mary Sue Rich Community Center.

FastTRAC graduated 22 entrepreneurs after they attended all 10 class sessions and fulfilled their business consulting commitments and completed their Business Plans and Capability Statements.

Coordinate the agenda for two days of the important visit of the KAUFFMAN FOUNDATION - FASTTRAC - 1MC Diaysha Cole, National Director of FastTRAC and 1MC, and María Mendoza, Affiliate Support for Spanish-Speaking Entrepreneurs.

Director of
IMPACT
Entrepreneur

IMPACT CONSTRUCTION ACADAMEY - Construction Sector a comprehensive program tailored for contractors and business owners aiming to excel in Florida's competitive construction industry. Our mission is to prepare you for procurement readiness, equipping you with the essential knowledge, skills, and tools to successfully bid on construction projects and expand your business opportunities. This month we had over 31 registered at the workshop on Government Contracting 10 with SBDC specialist Michael Chung.

CAPSULAS DE NEGOCIOS: Business Capsules is a program designed to support small and medium-sized hispanic business owners in understanding how to manage and grow their businesses in Marion County. Through interaction in an exclusive support group, limited to a maximum of 10 participants, and with expert guidance provided by PPBI - CEP Ocala, entrepreneurs receive knowledge, methodologies, tools, and strategies geared toward sustainable business growth. For the month of September, we have the support of an accountant expert in the field of construction companies through a one-on-one "Ask the Accountant" approach.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Attended the Nextgen Life Science Conference in North Carolina in the heart of UNC and there Research Triangle. Toured the new Eli Lilly space and connected with over 35 site selectors and developers in Life Science focus.

Project Activity: Project Colonel nearing the finish line. Project Genesis in Phase 1. Project Oliver looking at sites.

NEXTworking Healthcare Addition on 9/23 was the largest one to date with 150 students looking at healthare and life science industries as well as over 30 business experts in attendance.

Expansion project with a local company in the works with the city. Working on building rendering

Working on Appropriation request for Life Scienc Flex Space for 2026. Overviewing at delegation hearing.



**Bryce
Morrison**

Director of
Business
Development

Business Development

LLH had 820 Visit this month.

We submitted 2 RFI's this month. Project Coconut and Project Pipeline

I did not attend any trade shows this month.

Our LinkedIn presence and impressions are growing due to our increased targeted marketed efforts. Several posts focused on our target industries and welcoming new CEO.

Updated Sites & Buildings as necessary.



Beth McCall

Director Of
Advocacy &
Talent
Development

Talent Development & Advocacy

Government Meetings or Workshops: September 2, County Commission Meeting /

Host Quarterly Workshops / Round tables on Business Issues / Meet One-on-One with school and business leaders: 9/2, meeting with Vanguard High School principal, Colleen Wade / 9/10 - Lunch with school board member Sarah James / 9/15 - Convesations with Sarah James and Lori Conrad about participating in NEXTworking on Oct 9

Construction Academy Meetings: 9/11 - MCBIA Construction Academy Committee meeting /

NEXTworking (Students): 9/23 - Health Science at the College of Central Florida - 150 students

NEXTworking (Industry): August 19, Meeting with Douglas Cone III and Mel Rappleyea to discuss NEXTworking event / August 25, Meeting about NEXTworking event at WEC with Lisa Labo, WEC Director of Catering, Conference Services and Events / Meeting with Lt Paul Bloom of MCSO about NEXTworking

NOTE:



**Evelyn
Reyes**

VP, Business
Creation

Business Creation

Attended MCO Means business- 1400 Business owners in attendance

Attended the Sanford Airport procurement event

Met with BBIB Leadership to guide OMCF through the CDFI certification process and the documents process for lending.

Kauffman Visit the PPBI Fast Trac Graduation and 1MC. Gave them a tour of DT Ocala.

Created the OMCF Funding document and OMCF Funding Rack Card. To start gathering pledges for funding OMCF.



Tom James

Director of
Executive
Engagement

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Advanced Welding, SouthState Bank, Angie Lewis State Farm, Benmar Construction, Colomb Investment Management, Bailey Building, Douglas Law Firm, N. Central Florida Media Group, Gallagher, WEC, Pixelemm, Hilton Hotel, Seacoast Bank, Wilmek Construction, City of Ocala, TV20, Pro Realty of Ocala, Roam Electric, CPPI, Grandview Clydesdales.

Executive Partner Events (10/yr): Executive Roundtable Lunch was held at The Reilly's Black Box on August 27th, with 54 CEP "Executive Tier" Partners on hand.

Executive Tier Introductions: Clymer Farner Barley/Wawa, CPPI/Advanced Welding, Grandview Clydesdales/Colomb Investment Management, Bailey Bldg & Construction/Douglas Law Firm, Advanced Welding/Wilmek, Hilton/Colomb Investment Management, Hilton/SouthState Bank, Hilton/Seacoast Bank, Bailey Bldg & Construction/Gallagher.

Sponsorships (\$260K/yr): Pat Myers Electric (Horse Capital Parade Presenting Sponsor), Angie Lewis State Farm (2 NextWorking events), Smash Wraps (Jumbolair Equine Event), Wilmek Construction (Horse Capital Parade).

CEP 101s (200 attend./yr): 15 attendees



Andrea Bailey

Director of
Business Services

Leadership & Education

Tuesday Talks > September 9: Jen Houser with Creative Springs (30 CEP partners)

Friday Talks > Sponsorship ended

Leadership Ocala Marion (LOM) > September 8: SIMSOC at CF and September 13: Ropes at Elks in Umatilla September 30: Criminal Justice at Courthouse, OPD and MCSO (37 students)

Leadership Ocala Marion Youth (LOMY) > September 13: SIMSOC at CF and September 22: Career Readiness (36 students)

exCEptional Mornings > September 17: Natalie McComb - OSO and The Reilly (300 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 9 ribbon cutting/groundbreaking events

Partner Meetings: 19 meetings - 6 Business, 2 premium, 6 Legacy, 3 Leadership, 2 Founders

Engagement Events (150 attendees/mo): approximately 190 attendees at events; 70 at Conexion Hispana, CEP Power Network, YBL, BBL, Vetworks, and Stiletto Networks meetings, and President's Luncheon PLUS a Happiest Hour w/Roam Elec

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Outreach Activity (100/mo): Apprx 73 outreach calls - prospective, new, and established partner check-ins;



**Chris
Blakenship**

Partner Relations
Associate

Partner Sales

New Partner Sales: 13 @ \$10,300 (11 Bus, 1 Prem, 1 Leg)

Cold Calls: 119 (12 to recently dropped partners)

New Partner Meetings: 27 (14 in person)

End of First Year Renewals: 11 @ \$11,000 (8 Bus, 1 Prem, 2 Leg)

Partner Upgrades: 0



Ron Hipner

Partner Relations
Associate

Partner Sales

New Partner Sales: 1

Cold Calls: 2

New Partner Meetings: 2

End of First Year Renewals: 3



**Matt
Wilkerson**

Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 13 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 33 in-depth calls

Partner Videos (8/mo): 9 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list. **Some have requested a second video. Discussing a different approach moving forward for better response from partners.**



Diane Thomason

Partner Relations
Associate

Partner Sales

New Partner Sales: 1 @ \$5,000

Cold Calls: 4

New Partner Meetings: 1

End of First Year Renewals: 0



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$2,400. (FOUR Business Partners!)

BCEP Cold Calls: 198 - Six times canvassing and sharing invitations to events (Congressman Fine Meet&Greet, BotR, BBAH) -canvassing with ambassadors!! (And sharing invites at Foodie Fest) Also specific outreach for Beautify Bellevue to share information.

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Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 101 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 20 partners retained from 30+ days past due

Partner Upgrades & Value: None = \$0.00

Partner Events (Scheduling & posting): 52



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Meeting was held at in the CEP Boardroom with a demo and 101 in natural horsemanship with Dancin Pete Rodda from Complementary Horsemanship dnd refreshments by Royal Blessing Rescue .

Equine 101 & 201: Horsemanship 101 and 201

Farm/Venue/School Visit: Reddick Elementary and Camp Wildwood for Equestrian Girl Scouts

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Open Position

Chief of Staff &
Executive
Assistant

Finance & Administration



**Donna
Marseco**

Director of First
Impressions

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Finance &
Operations

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Ensure we have receipts/support for all credit card charges

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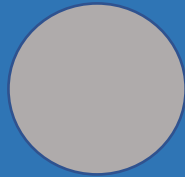
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2 grant applications submitted

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OPEN POSITION

Visual Media

Communications

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CEP on the Scene Views: Paused

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Arin
Conrad

Director of
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Market

Ocala Downtown Market

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Provide 2 Vendor Workshops a Year:



N/A

TBD