



**Ocala Metro Chamber & Economic Partnership (CEP)**  
**Business Creation, Retention and Attraction Services Agreement**  
**Fiscal Year 2023-24 Performance Summary**

The performance summary covers the reporting period from October 2023 to August 2024. The summary incorporates information submitted in the monthly written reports and performance matrix. Reports for September 2024 are not included.



<b>Par.#</b>	<b>CEP Responsibilities</b>	<b>Required</b>	<b>Actual</b>	<b>Comments</b>
2.1.	Host prospect visits during the year.	25	27	Key months - February (Annual Consultants Weekend held in February 2024) and May 2024.
2.1.	Host different companies considering locating a facility in the Ocala Metro.	18	19	
2.2.	Complete Targeted Marketing Campaigns.	5	18	
2.3.	Visit with the premier site selection consultants in key markets.	4	7	
2.5.	Complete and document in the Salesforce CRM business retention calls.	150	436	
2.6.	Engage students in NEXTworking career development events.	300	381	
2.6.	Engage businesses in NEXTworking career development events.	35	35	
2.8.	Assist entrepreneurs through the IMPACT initiative.	150	104	Director of IMPACT Initiative position is currently vacant.
2.9.	Offer FastTrack to cohorts in the City targeting residents of West Ocala for inclusion in the City's Diverse Small Business Enterprise initiative.	2	2	Held in October 2023 & February 2024.
2.11.	Provide City with a monthly written report and performance matrix update as to the status of each of these responsibilities.	12	11	Reports are due September 30, 2024.
2.12.	Provide City with a quarterly financial report of how City investment is being used.	4	3	The last quarterly report is due September 30, 2024.
2.4.	Continue to build and maintain the sites and Buildings database through GIS Web Tech or a comparable program.			Responsibility fulfilled.
2.7.	Continue the operation and promotions of the Power Plants as part of a complete Business Creation initiative.			Responsibility fulfilled.
2.10.	Serve as the official local representative to Florida Commerce.			Responsibility fulfilled.




**Financial Report Summary**




The CEP is required to provide the City with a quarterly financial report detailing how the City's investment is being utilized. The City agreed to compensate CEP \$190,000 for their services, payable in four quarterly installments of \$47,500 each. The City has paid all four installments to CEP. To date, the CEP has submitted three quarterly reports covering the period from October 2023 to June 2024. These reports show that CEP has incurred expenses totaling \$548,268.52 in salaries and benefits. The City's compensation has helped offset these expenses. The final quarterly financial report covering July 2024 to September 2024 is due on September 30, 2024.



		January	February	March	April	May	June	July	August	September	October	November	December	Total
 Tamara Fleischhaker Chief eXperience Officer	Quest: 2023 Savannah	Working to secure date	Working to secure date	Working to secure date	Working to secure date	Working on October date	Working on 10/10-10/12 date	Postpone to April 2024	Postpone to April 2024	Postpone to April 2024	Postpone to April 2024	Postpone to April 2024	Postpone to April 2024	--
	Attend 4+ Gov Workshop(s)	0	0	1	1	0	0	1	5	0	4	1	3	16
	Hold 4+ Equine Advocacy Meetings	0	0	0	1	0	0	0	1	0	0	0	1	3
	4+ Partner Workshops or Roundtables	0	0	0	0	0	0	0	0	1	0	0	0	1
	Initiate Tourism Study	0	0	0	0	0	0	0	0	Postpone to 2025	Postpone to 2025	Postpone to 2025	Postpone to 2025	Postpone to 2025
 N/A Director of Business Advocacy														
Notes:	New Director of Business Advocacy starting on January 3, 2024													



		January	February	March	April	May	June	July	August	September	October	November	December	Total
 Erin Jones Director of Healthcare Development	HC Council/NEXTworking (150)	0	52	32	0	35	0	0	34	37	0	34	0	224
	Comm. Touchpoint (120)	22	15	12	10	14	8	7	12	11	15	18	10	154
	HC Conf/Trade Show(1-2)	0	0	0	1	1	0	1	0	1	1	0	0	5
	HC Exc. Tier Touch Base/Mtg.(15)	3	2	2	2	2	2	1	3	2	2	4	2	27
	Healthcare Insider (180)	0	0	34	0	54	0	0	43	0	56	0	0	187
 Beth McCall Director of Talent Development	One-on-one meetings-30	2	4	4	2	2	1	0	1	9	0	2	0	27
	Committee Meetings & Events 20	1	3	3	8	1	1	3	5	4	1	1	2	33
	CTE meetings 20	1	3	7	3	5	3	4	2	1	3	0	0	32
	NEXTworking-400 studs, 70 bus	X	X	x	X	X	X	X	X	200	416	0	0	616
	School Board Engagement	3	7	6	1	5	2	12	5	6	2	3	4	56
	Educator engagements-20	X	0	0	0	1	0	1	0	0	20	0	0	22
<b>Notes</b>														




		January	February	March	April	May	June	July	August	September	October	November	December	Total
 Tyler LeCompte Director of Entrepreneurship Services	Technical Assistance (100)	4	4	8	7	18	10	7	15	6	21	8	5	113
	CDFI (TBD)	1	1	1	2	2	2	1	1	1	1	1	1	15
	2023 BC Programs (4)	0	1	1	1	1	1	2	0	0	1	1	0	9
	2nd Stage Programs (15)	1	1	1	1	1	1	1	1	2	2	1	1	14
	GrowthBiz Prospects (12)	1	2	1	0	1	1	1	1	1	1	0	0	10
 Jessica McCallum Director of Business Creation	Avg 1MC Attendees (45)	42	58	55	55	60	60	55	50	60	55	54	55	55
	PPBI Occupancy (min 50%)	100%	100%	98%	98%	88%	78%	78%	83%	70%	75%	75%	84%	80%
	Social Media Content (12)	1	2	2	3	2	3	3	5	5	4	5	4	39
	Resident Meetings (36)	2	1	2	1	2	3	3	4	4	4	4	4	34
	Programming Residents (12)	1	1	1	1	1	1	1	1	2	2	4	4	20
 Cherrietta Prince Director of IMPACT	New Clients (105)	13	17	14	19	12	15	12	8	9	18	7	11	155
	FastTrac Courses (3)	0	0	0	1	0	1	1	0	0	1	0	0	4
	West Ocala Touches (35)	4	7	4	6	4	5	4	3	3	7	4	4	55
	Marion Oaks Touches (35)	3	5	3	7	3	2	4	3	3	5	2	4	44
	Silver Springs Shores Touches (35)	5	4	4	5	5	7	4	2	3	3	1	2	45

		January	February	March	April	May	June	July	August	September	October	November	December	Total
 Tom James Director of Executive Engagement	Executive Partner Visits-86	9	9	17	16	14	15	10	17	14	15	21	17	174
	Exec Partner Events-10	x	x	1	1	2	x	x	1	1	1	2	1	10
	Sponsorship rev - \$100,000	\$48,000	\$16,000	\$12,500	\$8,600	\$35,900	\$12,500	\$17,500	\$34,000	\$2,500	\$11,500	\$27,500	\$31,000	\$257,500
	Business After Hours - 4,200	370	350	260	510	280	320	240	290	320	380	435	345	4100
	CEP 101 -144	21	x	30	25	22	20	15	x	27	18	x	16	194
 Andrea Bailey Director of Business Services	Tuesday Talks 15 Attendees	15	15	16	25	21	20	26	21	23	22	12	14	19
	Friday Talks 15 Attendees	18	17	22	25	8	10	18	44	29	23	14	12	20
	LOM -30 Participants	30	30	30	30	30	X	32	30	30	30	30	30	30
	LOMY - 33 Participants	33	33	33	33	33	X	35	35	35	35	33	33	34
	EM Breakfast 310 Attendees	339	361	338	335	424	354	346	356	345	347	327	250	344
 Jess Schultz Senior Director of Partner	Partner Events (75)	3	8	13	8	12	7	6	7	13	12	9	8	106
	Partner Meetings (100)	11	21	24	23	18	12	17	19	18	16	18	9	206
	Business After Hours (4800)	370	240	320	480	400	390	320	290	380	420	435	375	4420
	Upgraded Partners (\$100k)	0	\$7,500	\$1,900	\$5,700	600	0	0	0	\$1,900	6900	1800	11,400	37700
	Other Events (540)	88	65	68	18	65	210	160	145	190	180	235	120	1544

		January	February	March	April	May	June	July	August	September	October	November	December	Total
 Louisa Barton Director of Equine Engagement	Equine Meetings (10)	1	1	1	1	1	1	1	1	1	1	1	1	12
	Equine 101s (2)	1	1	1	1	1	1	1	0	1	0	1	0	9
	Venue/Farm Visits (10)	2	1	3	5	4	5	8	1	1	1	1	1	33
	Equine Events (6)	2	1	6	5	3	1	1	0	1	1	3	0	24
	Equine Promos	2	3	10	7	6	6	3	3	4	6	2	4	56
 Jim Pazda Director of Business Services	Partner Touches	77	80	88	70	80	75	83	80	66	80	64	60	903
	Retained Partners	15	12	4	6	5	8	9	6	10	6	5	11	97
	Partner Upgrades	6	2	2	3	2	0	1	0	1	2	2	2	23
	Value of Upgrades	\$ 77,500	\$10,000	\$3,700	\$17,500	\$12,000	\$0.00	\$5,000.00	\$0.00	\$2,500.00	\$ 25,000.00	\$ 2,400.00	\$ 6,200.00	\$ 161,800
	Notes													





		January	February	March	April	May	June	July	August	September	October	November	December	Total
 Bryan Aman CFO	Audit AR/AP Files Quarterly	X	X	X	√	X	X	X	X	√	√	√	√	√
	Provide Monthly Financials to the Team	X	X	X	√	√	√	√	√	√	√	√	√	√
	Payroll Submitted on Time	√	√	√	√	√	√	√	√	√	√	√	√	√
	Financials to Board	√	√	√	√	√	√	√	√	√	√	√	√	√
	Deposits and Invoices Weekly	√	√	√	√	√	√	√	√	√	√	√	√	√
 Kimberly Executive Assistant	Past Due Outreach	31	40	28	33	52	37	31	29	40	15	35	61	432
	Verify Partner Billing	√	√	√	√	√	√	√	√	√	√	√	√	√
	Renewal Report	√	√	√	√	√	√	√	√	√	√	√	√	√
	Pay All Invoice	√	√	√	√	√	√	√	√	√	√	√	√	√
														0
 Donna Marseco Director of First Impressions	Monthly Invoices & Statements	√	√	√	√	√	√	√	√	√	√	√	√	√
	New Partner Packets	28	22	27	21	21	22	19	20	18	11	12	10	231
	Relocation two Week	12	12	8	9	7	2	1	4	5	7	9	3	79
	Renewal Packets	83	47	70	62	48	56	59	76	29	40	80	62	712
	Touchpoint	55	97	87	71	81	75	82	78	87	53	161	55	982







Kelli Holt

Director of  
Business  
Advocacy

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Quest: 2024 Savannah	Planning in process	Planning in process	Planning in process	✓	✓	✓	✓	✓					✓
Attend 4+ Gov Workshop(s)	5	4	6	5	7	4	4	5					40
Hold 4+ Equine Advocacy Meetings	0	0	0	0	0	1	0	0					1
4+ Partner Workshops or Roundtables	0	0	0	0	0	0	0	0					0
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Notes:

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	January	February	March	April	May	June	July	August	September	October	November	December	Total
 Bart Rowland, MEDP  VP of Job Creation	Retention Visits (200)	15	15	15	12	15	16	18	23				129
	New Jobs Created (400)	48	0	50	0	0	0	500	0				598
	Capital Invest. (\$40MM)	\$3	0	4	16	3	43	37	6				\$112.0
	Primary Employer Events	0	1	0	0	0	0	0	0				1
	Corporate Visits (2)	0	0	0	0	0	0	1	0				1
 Erin Jones  Director of Healthcare Development	HC Council/ NEXTworking (150)	65	0	38	0	0	36	0	35				174
	Comm. Touchpoint (120)	25	20	25	20	18	15	10	12				145
	HC Conf/ Trade Show(2-4)	1	1	0	3	0	1	0	0-				6
	HC Exc. Tier Touch Base/Mtg.(15)	5	4	6	3	2	1	1	2				24
	Healthcare Insider (100)	0	0	55	0	31	0	0	0				86
 Bryce Morrison  Director of Business	LLH Website Visits (20k)	1,315	1,789	1,697	1,625	1,576	1,593	1,922	1,766				13,283
	RFI's (10/yr)	2	1	2	2	0	2	1	4				14
	Trade Shows (6)	2	0	0	1	1	1	0	0				5
	Consultant & Project Updates	3	2	2	5	5	4	4	4				29
	Sites & Buildings Updated	✓	✓	✓	✓	✓	✓	✓	✓				0

		January	February	March	April	May	June	July	August	September	October	November	December	Total
 Dean Blinkhorn COO/Director of Talent Development	Construction Academy meetings (12)	1	1	N/A	1	1	0	1	1					6
	Primary Contact Meetings (12)	0	0	2	1	4	1	4	3					15
	Assist With Youth Biz Plan Comp. (1)	0	0	1	1	0	0	0	0					2
	NEXTworking (400 students)	Fall	Fall	Fall	Fall	Fall	Fall	Fall	Fall					0
	NEXTworking (70 businesses)	Fall	Fall	Fall	Fall	Fall	Fall	Fall	Fall					0
 Evelyn Reyes VP, Business Creation	Create 1 Biz Procurment Event	0	0	0	0	0	0	0	1					1
	Create 1 Biz Access to Capital Event	0	0	0	0	0	0	0						0
	1-on-1 With (20) Lenders	4	1	6	4	5	6	3	4					33
	1-on-1 With (20) Strategic Partners	2	3	7	6	7		4	10					39
	Silver Springs Shores Occupancy (50)	Not Open	Not Open	Not Open	June 19th	June 19th	33%	33%	33%					33%



Freddie  
Morris  
Director of  
Entrepreneurship  
Services

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Technical Assistance (100)	20	5	10	0	3	3	6	4					51
Avg. 1MC Attendees (45)	55	60	55	55	56	56	58	57					452
2023 BC Programs (4)	0	1	1	0	1	0	0	0					3
2nd Stage Programs (15)	1	1	1	1	0	0	0	0					4
GrowthBiz Prospects (12)	1	1	1	0	2	0	0	0					5






Jessica  
Michel  
Director of  
Business  
Creation

PPBI Occupancy (min 50%)	86	86	78	78	83	83	90	80					664
Community Outreach	10	2	2	1	3	2	1	0					21
OP Produced Content 1x12	1	7	1	3	3	4	2	4					25
Resident 1 on 1 (44)	5	2	2	1	2	2	8	6					28
Graduate 3 companies	1	0	1	0	2	0	0	0					4

Open Position  
Director of  
IMPACT Initiative

Technical Assistance (105)	21	11	5	0	8	7	4	8					64
FastTrac Courses (2)	0	1	0	0	0	0	0	0					1
West Ocala Touches (35)	8	4	1	0	1	2	0	0					16
Marion Oaks Touches (35)	7	1	0	0	3	2	0	0					13
Silver Springs Shores Touches (35)	5	4	3	0	3	3	0	0					18

	January	February	March	April	May	June	July	August	September	October	November	December	Total
 <b>Tom James</b> Director of Executive Engagement	Exec Partner Visits - 175	20	29	17	15	22	18	20	16				157
	Exec Partner Events-10	x	x	2	x	1	1	1	1				6
	Exec. Tier Introductions	8	\$8	\$10	\$5	\$5	\$10	\$8	\$8				\$62
	Sponsorship Rev - \$260K	\$36,000	6500	10,700	29,600	7500	12,500	7,500	24,500				134800
	CEP 101 200 Attendees	19	x	24	19	22	12	16	21				133
 <b>Andrea Bailey</b> Director of Business Services	Tuesday Talks 18 Attendees	24	15	31	10	50	50	26	21				28
	Friday Talks 18 Attendees	54	20	17	22	30	15	23	25				26
	LOM 30 Participants	30	30	30	30	30	X	37	37				32
	LOMY 33 Participants	33	33	35	35	38	38	38	38				36
	EM Breakfast 380 Attendees	436	285	308	351	395	302	303	338				340
 <b>Jess Schultz</b> VP of Partner Engagement	Partner Events (10)	8	12	14	9	8	9	6	10				76
	Partner Meetings (15)	26	22	20	19	15	12	20	26				160
	Business After Hours (400)	482	350	330	460	340	380	350	350				3042
	Bview Events AM+PM (500)	2500	500	370	380	263	302	400	320				5035
	Other Events (100)	120	95	103	145	183	92	150	120				1008





Joe Reichel

Director of  
Bellevue CEP




	January	February	March	April	May	June	July	August	September	October	November	December	Total
BCEP New Partners	9	8	7	3	9	7	5	4					52
BCEP Cold Calls	300	30	180	175	77	53	40	35					890
BCEP New Partner Meetings	9	13	6	6	15	10	12	8					79
BCEP Sponsorship	\$6,000	\$800	7600	\$1,600	\$0	3000	\$0	1800					\$20,800
BCEP Partner Upgrades	0	0	0	1 (\$1900)	0	0	0	0					0
Partner Touches	98	111	104	108	90	82	77	81					751
Retained Partners	8	13	10	10	11	13	8	7					80
Partner Upgrades	4	2	2	2	2	1	0	1					14
Value of Upgrades	\$ 37,500	\$5,000	\$45,000	\$7,500	\$3,700	\$2,500.00	\$0.00	\$2,500.00					\$ 103,700
Partner Events	26	25	24	22	38	57	38	80					310






Jim Pazda

Director of  
Business  
Services



	January	February	March	April	May	June	July	August	September	October	November	December	Total
 Kimberly Langley Executive Assistant	Past Due Outreach	39	38	37	46	50	71	64	56				401
	Verify Partner Billing	√	√	√	√	√	√	√	√				√
	Renewal Report	√	√	√	√	√	√	√	√				√
	Pay All Invoice	√	√	√	√	√	√	√	√				√
 Donna Marseco Director of First Impressions	Monthly Invoices & Statements	√	√	√	√	√	√	√	√				√
	New Partner Packets (250)	18	24	11	27	30	24	22	23				179
	Relocation Packets two Week (80)	7	10	9	9	7	6	8	4				60
	Renewal Packets (720)	76	63	44	81	101	43	90	66				564
	Touchpoint Postcards (1,000)	79	116	56	98	73	91	90	67				670
 Amie Marsh Director of Finance & Operations	Ensure we have receipts/support for all credit card charges	√	√	√	√	√	√	√	√				√
	Resolve Partner Billing Discrepancies (Weekly Basis) (50)	5	5	7	8	6	6	5	7				49
	Verify that all bills recorded in the accounting software	√	√	√	√	√	√	√	√				√
	Record credit card charges (Weekly Basis) (50)	5	5	4	4	4	4	6	8				40
	Operational Meetings (50)	4	4	5	10	6	2	5	4				40

	January	February	March	April	May	June	July	August	September	October	November	December	Total
 Jessica Gilbert VP Foundation for CEP	Grant Funding Secured (G:\$100k)	0	0	N/A	-	-	10,000	-	0				10,000
	Submitted Grant Apps (Goal: 12)	1	0	N/A	1	2	2	2	1				8
	Income (Goal: \$250k)	TBD	0	N/A	0	0	0	0	0				-
	Foundation Visits (Goal:36)	3	0	N/A	1	2	2	5	5				18
	Podcast Downloads (Goal: 800)	79	0	N/A	29	27	28	32	29				224
 Sullivan Hogan Director of Video Communications	Weekly Buzz Views (Goal: 32,000)	2885	3158	2806	4566	5560	4159	5358	6617				35,109
	CEP on the Scene Views (Goal: 10,000)	480	690	644	N/A	4793	1849	773	1463				10,692
	POV Views (Goal: 20,000)	1440	1594	1470	3074	2845	4090	2568	1874				18,955
	A Closer Look & Leading the Way View (Goal: 5,000)	N/A	N/A	995	N/A	N/A	N/A	N/A	N/A				995
	Additional Internal Videos (Goal: 20)	1	2	0	1	2	1	2	0				9
 Kelly McAtee Director of Social Media & Marketing	FB New Follows (Goal: 1,200)	155	141	125	154	127	121	107	79				1,009
	Facebook Posts Reach (Goal: 425,000)	55,166	102,602	61719	62335	52839	53,878	62595	21734				472,868
	LinkedIn Posts Reach (Goal: 80,000)	10,500	8300	9500	6500	13600	10,500	8923	7123				74,946
	Email Opens (Goal:150,000)	26,698	26046	21534	14867	12114	18469	19591	24895				164,214
	Website Reach (Goal: 95,000)	10,217	22885	9095	5600	5284	8557	7895	8432				77,965

