



Kelli Holt
Director of
Business

Business Advocacy

Inter-City Visit > The Quest-Savannah: Organizing Ocala Thing Tank Committee, as a post event measure to discuss and implement ideas in Ocala. First meeting will be scheduled mid to late August.

Attended (4) Government Meetings or Workshops: (7/2, 7/16); City Council, (7/2, 7/16) County Commissioners; MC School Board (7/11) Administrative Briefing & Work Session [Procurement procedures] (7/30) Millage & Budget Hearing

Host Quarterly Workshops / Roundtables on Business Issues: None held in July. Working with Congresswoman Cammack's office on roundtable during the August Congressional break

Began working on the 2025 Business Advocacy Program of Work.

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

Local & Legislative

Attended local meetings: (7/12/24) Florida Public Relations Association-- Communicating with elected officials, (7/11/24) MCBIA Builders Roundtable Breakfast.



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Project Rocky closed on the purchase of an industrial property in the Florida Crossroads Commerce Park. This successful project brings another advanced manufacturer to the Ocala Metro and will result in more than \$60 MM in capital investment and hundreds of new jobs.

The Dollar Tree Distribution Center hosted the University of Florida's Wedgeworth Leadership Institute. This group contains business leaders from across Florida and will highlighted our reputation as a logistics hub for the Southeast US.

I attended the Southern Economic Development Council Annual Conference. This event builds upon existing relationships within the ED world, site selectors, construction sector, and industrial brokers from across the SE US.

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.

Our team hosted Project Cherry Blossom as an introduction to the market, tour of an existing business, and visit to the World Equestrian Center. This project has the potential to bring new life to several construction related sectors in the region.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Overseeing Water/Sewer Study for infrastructure and site development. Completion of Study, early August.

NEXTworking Healthcare Session prep with HC volunteers for September event. 17 confirmed so far.

Project Virgo site visit for expansion opportunity.

Finalizing Legislative Agenda for HC Council with Old Florida Partners

Finalized Attraction Marketing decks for Life Science, Aviation and Manufacturing.



Bryce
Morrison

Director of
Business
Development

Business Development

LLH had 1,922 webvisits.

We submitted 1 RFI this month. Project Trelleborg is a food manufacturer estimating 150 jobs.

I did not attend any conferences or tradeshow this month.

Project Cherry Blossom site visit went extremely well. International company considering Ocala for expansion. Several meetings and site tour for Baseline Water study. Discussions surrounding Ocala Airport and Florida Huddle.

Updated Sites & Buildings as necessary.



Evelyn
Reyes

VP, Business
Creation

Business Creation &
Hispanic Engagement

Completed the Loan process for the Ocala Catalyst Fund.

Attended the NAWBO- Networking for good event in Orlando, Fl.

Attended the CEO Networking Reception- eXceptional Mornings- CEP business after hours- CEP President's Lunch.

Restructured what business educational workshops will be executed before end of year.

Scheduled the Launch of " Hablemos De Negcios" Sept. 12, 2024. Thereafter once a month.



Dean
Blinkhorn

COO/Director Of
Talent

NEXTworks
(Talent Development)

Construction Academy Meeting: July 19.

Primary Contact Meetings: Coffee with Jennifer Fryns from CF on 7/11, lunch with Gary Smallridge from MTC on 7/25, Zoom call with Cory Weaver from CareerSourceCLM on 7/26, and lunch with Chris Carlisle with MCPS on 7/31.

Assist Youth Business Plan Competition: Event is planned.

NEXTworking: In the fall.

Notes:

Attended the new board member orientation for the Public Education Foundation on 7/23, CEO Network Reception on 7/23, Belleview Business After Hours on 7/25, and Catalytic Conversations on 7/30.



Jessica
Michel
Director of
Business
Creation

Power Plant Incubator

PPBI Occupancy: 90%. 2 New Incubator Partners: BlackHorse Realestate & UBS Staffing. 2 office spaces available (110 & 107)

Community Outreach: CEP 101 presentation, other than that none for this month

Content Creation: Completed IMPACT logo. Hispanic Hertiage Month Celebration Flyer. Working on 4 page booklet for PPBI. SCORE ESB workshop flyer created.

Programming: 1MC Ocala averages 54 attendees this month. Weekly Power Hour with PPBI Partners. We started weekly Partner Presentations for Power Hour. We had Ryan from Webway present, Dyson with the Birthday Club, Monica with Ocala Easy Patent, and Kenion with Spotless Gutter Cleaning

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



Director of
Entreneurship
Services

2nd Stage Businesses

Started intake forms for organizations we use for resources (Hispanic Chamber, National Entrepreneur Center etc.)

Business Creation Content Creation: Power Plant Incubator Instagram has increased its engagement by 46%

Developed 1 Million Cups Survey to track data on attendees

Created documents explaining the registration process of becoming Minority/Women/Veteran owned business.

Completed Document Updating metrics for Truist Grant



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Tri-Eagle, Ocala Design Group, Pinnacle Retirement Advisors, Cone Distributing, Nash Plumbing, Mainstreet Bank, Cogent Bank, UF Health, Pixellem, Roberts of Ocala, Alien Engineered Products, The Guest House, Marion County, SouthState Bank, Grandview Clydesdales, First Federal Bank, Signature Brands, Courtyard by Marriott, Sherman Mechanical, Miller & Sons Plumbing.

Executive Partner Events (10/yr): The 2Q CEO Network Reception was held July 23rd, with 63 CEP Partners in attendance.

Executive Tier Introductions: WCJB/PRP Aviation, Colomb Investment Management/Douglas Law Firm, ACME Fill/Sevilla Law Firm, R+L Global Logistics/Pixellem, Ameris Bank/Fenix, Sabal Direct Primary Care/New York Life, Hiers-Baxley/City of Ocala, Marion County/Birge & Held.

Sponsorships (\$260K/yr): Ag-Pro (Hobby Horse Equestrian Games), Larsen Hay (Hobby Horse Equestrian Games), Seminole Wellness (Equine Expo/Hobby Horse), Advanced Welding (NEXTworks/CTE event).

CEP 101s (200 attend./yr): We had 16 on hand.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > July 16 - Brain Aging - Cammy Dennis OTOW (26 CEP partners)

Friday Talks > July 26 - Strong Leadership - Cain Davis, Diversified Consulting (23 CEP partners)

Leadership Ocala Marion (LOM) > Interviews for new Class July 29-30 (37 partners)

Leadership Ocala Marion Youth (LOMY) > LOMY Interviews for next Class - 72 Application, 71 Interviews and 38 Accepted

exCEPtional Mornings > July 17th - Alan Keesee - HCA Florida CEO (303 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

OCEP Partner Events (10/mo): 6 ribbon cutting events

Business After Hours (400/month): 350 attendees at Business After Hours UF Health

Other CEP Events (150/mo): approximately 150 attendees at partner events MBA, President's Luncheon, CEP 201, Networks Meetings

BCEP BAH/BotR (300/mo): BotR 100 attendees, BBAH 300 attendees

BCEP Other events (5/mo): 1 Belleview CEP ribbon cutting



Chris
Blakenship
Partner Relations
Associate

Partner Sales

New Partner Sales: 15 @ \$13,700

Cold Calls: 167

New Partner Meetings: 32

End of First Year Renewals: 5

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:



Matt
Wilkerson
Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 20 in-person visits

Partner Calls (30/mo): 41 in-depth calls

Partner Videos (8/mo): 23 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: 5

BCEP Cold Calls: 40

BCEP New Partner Meetings: 12

BCEP Sponsorship: \$0.00

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: 8 partners retained from 60-90+ days past due

Partner Upgrades & Value: NONE

Partner Events (Scheduling & posting): 38



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Initiative Meeting, presented by Pyranha, was held at the Ocala Downtown Market during Reading with Horses, so CEP partners could see how the program works in MCPS elementary schools during the school year.

Equine 101 & 201: Reading with Horses 101 and Equine Industry 201

Farm/Venue/School Visit: Persaud Legacy Farms

Equine Events and Community Meetings: American Horse Council Convention in Washington DC (June), Florida Horse Park Board and Ocala Farm Ministry Board

Equine Industry Promotion: Wrote the equine newsletter and wrote the Everything Equine section for Ocala Magazine. Also, met with Orlando International Airport via Zoom about Equine International Quarantine as well as an in person meeting on 7/30.



Kimberly
Langley

Executive
Assistant

Finance & Administration

Past Due Outreach - 64

Verify All New Partners Billing: July 2024

Pull Renewal Report - July 2024

Pay All Open Invoices Weekly - July 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 (TD Bank)

Applications pending: PNC/Duke

Ended 2023 with total Foundation income of \$298,204. Total income for the month of December was \$42,791 which included \$20k grant from Duke Energy.

The Catalyst had 32 downloads/views between all channels including YouTube. New episodes to premiere in August: Rondo Fernandez/Dawn Westage - September: Levonda Goodson



Sullivan
Hogan
Director of Video

Communications

Weekly Buzz Views: There were 5358 for episodes 272 - 275 over doubled our stretch goal average of around 2650 views per month, with episode 274 on Smalls Sliders notable reaching over 1.6K views

CEP on the Scene Views: There 773 views for CEP on the Scene this month. It should be noted this episode was posted only two days prior to this number being taken, and the most recent episode was reposted by ACCE

POV Ocala Views: There were 2568 views for episodes 58 & a 59, sitting at around 1.5x our stretch goal average of about 1650 views per months

Irregular Series Views (Closer Look, Leading): N/A

Additional Internal Videos: One video invite and looper for video presentation



Kelly McAtee
Director of Social
Media &
Marketing

Communications

New Facebook Followers: 107 new monthly followers | 12,937 total followers

FACEBOOK Post Reach: 62,595 | **Engagement:** 6,547 | Top posts were **Ribbon Cuttings:** Marion Baptist Association-871, Molly's Law Statue-1579, Spider Ranch Productions-2743, Friday Talks (1179), Tuesday Talks (2238), EM Flyer (1190), EM Photos (N/A), BAH Flyer (1660), BAH Photos (3796), Weekly Buzz (ep 271 -274 - 3716), CEP On The Scene (N/A), POV (834), YPO Leaders Lunch (1009), Networking University (474), Belleview- BOTR/BBAH (2118), Floirda FAST Olympics (34,662)

FACEBOOK Group Reach: 8,142 | **INSTAGRAM Reach:** 1477 (CEP), 360 (ODM), 52 (Equine), 417 (BelleviewCEP)

Email Blast Open Rate: Number of people opening email blasts are at an increase of 19,591

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 at 7895

LinkedIn Followers & Post Impressions: 8,923 organic impressions with 53 new followers at 2,998 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**

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

36 Pavillion Rentals for the year: Jan 6, Feb 4, March 4, April 5, May 4, June 4, July 2,

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

Provide 2 Vendor Workshops a Year:



N/A

TBD