











|  | January  | February | March    | April     | May       | June      | July      | August    | September | October | November | December | Total |
|--|--|----------|----------|-----------|-----------|-----------|-----------|-----------|-----------|---------|----------|----------|-------|
| <br><b>Tamara Fleischhaker</b><br>VP of Business Advocacy & Partner Services | Quest: 2020 Asheville                                    | Fall '21 | Fall '21 | Sept. 7-9 | Sept. 7-9 | Sept. 7-9 | Sept. 7-9 | Sept. 7-9 | Sept. 7-9 |         |          |          | ✓     |
|  | Attend 1+ Gov Workshop(s)                                | 0        | 1        | 0         | 0         | 1         | 0         | 1         | 0         | 1       |          |          | 4     |
|  | Two Partner Surveys                                      | 0        | 1        | 0         | 0         | 0         | 0         | 0         | 0         | 0       |          |          | 1     |
|  | Two Partner Workshops                                    | 0        | 0        | 0         | 0         | 0         | 0         | 0         | 0         | 0       |          |          | 0     |
|  |  |          |          |           |           |           |           |           |           |         |          |          |       |
| <br><b>Joe Reichel</b><br>Director of Business Advocacy                      | eM Attendance Average 275                                | 145      | 176      | 182       | 180       | 256       | 340       | 313       | 257       | 305     |          |          | 239   |
|  | Host 2 sessions elected officials & business             | 1        | 1        | 0         | 0         | 0         | 0         | 0         | 2         | 0       |          |          | 4     |
|  | An election guide for candidate & issues                 | X        | X        | X         | X         | X         | X         | X         | 1         | x       |          |          | 1     |
|  | Attend 4+ local gov. meetings each month                 | 4        | 4        | 4         | 3         | 4         | 4         | 4         | 3         | 4       |          |          | 34    |
|  | Assist partners with Advocacy Issues                     | 2        | 3        | 0         | 8         | 4         | 4         | 2         | 4         | 6       |          |          | 33    |
| Notes:   | Big advocacy win with helping Mutiny to be able to open. |          |          |           |           |           |           |           |           |         |          |          |       |
|  |  |          |          |           |           |           |           |           |           |         |          |          |       |
|  |  |          |          |           |           |           |           |           |           |         |          |          |       |
|  |  |          |          |           |           |           |           |           |           |         |          |          |       |

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|---|---|---------|----------|-------|-------|-----|------|------|-----------|-----------|---------|----------|----------|-----------|
| <br><b>Brett Barnes</b><br>VP of<br>Job Creation                  | Attend Trade Shows (3)  | X       | X        | X     | 1     | X   | 2    | X    | 2         | X         |         |          |          | <b>5</b>  |
|   | Site Selector Visits in Key Markets (25)  | 3       | 4        | 3     | 1     | 6   | 3    | 1    | 7         | 2         |         |          |          | <b>30</b> |
|   | FAM Tour (1)  | X       | X        | X     | X     | X   | X    | X    | Oct 15-17 | Oct 15-17 |         |          |          | <b>0</b>  |
|   | Host Consultant Events in Key markets (3)   | X       | X        | X     | X     | X   | 1    | X    | X         | 1         |         |          |          | <b>2</b>  |
|   | Digital Marketing (Qtly)  | 1       | 1        | 1     | 1     | 1   | 1    | 1    | 1         | 1         |         |          |          | <b>9</b>  |
| <br><b>Erin Jones</b><br>Director of<br>Healthcare<br>Development | Communication Highlight (mthly)   | 3       | 5        | 6     | 7     | 8   | 10   | 7    | 15        | 11        |         |          |          | 72        |
|   | Touchpoint Calls/Emails (10)  | 35      | 15       | 22    | 35    | 40  | 50   | 36   | 41        | 24        |         |          |          | 33        |
|   | Healthcare Council (Quarterly)  | 1       | 0        | 0     | 1     | 0   | 0    | 1    | 0         | 0         |         |          |          | 3         |
|   | HC Strategy Check (Qtly)  | 4       | 3        | 5     | 8     | 6   | 7    | 5    | 6         | 5         |         |          |          | 49        |
|   | HC NEXTworks Event  | 0       | 0        | 0     | 0     | 0   | 0    | 0    | 0         | 0         |         |          |          | 0         |
| <b>Notes:</b>   | Prep for Investor calls for HC Incubator, New Project leads and upcoming 4Q HC Council/HC Insider |         |          |       |       |     |      |      |           |           |         |          |          |           |
|   |   |         |          |       |       |     |      |      |           |           |         |          |          |           |
|   |   |         |          |       |       |     |      |      |           |           |         |          |          |           |
|   |   |         |          |       |       |     |      |      |           |           |         |          |          |           |







|   |                                   | January | February | March | April | May | June | July | August | September | October | November | December | Total         |
|---|-----------------------------------|---------|----------|-------|-------|-----|------|------|--------|-----------|---------|----------|----------|---------------|
| <br><b>Ryan Lilly</b><br>VP of<br>Business Creation             | New Clients (125)                 | 11      | 14       | 15    | 18    | 16  | 19   | 17   | 24     | 22        |         |          |          | <b>156</b>    |
|   | Targeted Events/Shows (6)         | 0       | 0        | 0     | 0     | 0   | 0    | 0    | 1      | 1         |         |          |          | <b>2</b>      |
|   | 2nd Stage Prospects (50)          | 2       | 2        | 3     | 2     | 2   | 1    | 1    | 8      | 1         |         |          |          | <b>22</b>     |
|   | 2nd Stage Site Visits (8)         | 0       | 0        | 0     | 1     | 0   | 1    | 0    | 0      | 0         |         |          |          | <b>2</b>      |
|   | 2nd Stage Locations (4)           | 0       | 0        | 0     | 0     | 0   | 0    | 0    | 0      | 0         |         |          |          | <b>0</b>      |
| <br><b>Jessica McCallum</b><br>Director of<br>Business Creation | Avg IMC Attendees (45)            | 13      | 15       | 20    | 25    | 23  | 22   | 20   | 11     | 15        |         |          |          | <b>18</b>     |
|   | PPBI Occupancy (min 50%)          | 76%     | 76.00%   | 85%   | 100%  | 90% | 78%  | 81%  | 81%    | 71%       |         |          |          | <b>84.00%</b> |
|   | Social Media Content (12)         | 5       | 4        | 9     | 9     | 9   | 9    | 11   | 9      | 9         |         |          |          | <b>74</b>     |
|   | Resident Programs (12)            | 0       | 0        | 0     | 0     | 1   | 0    | 0    | 0      | 0         |         |          |          | <b>1</b>      |
|   | Incubator Tours (12)              | 0       | 1        | 1     | 2     | 1   | 1    | 2    | 1      | 1         |         |          |          | <b>10</b>     |
| <br><b>Cherrietta Prince</b><br>Director of<br>IMPACT         | New Clients (100)                 | 34      | 39       | 29    | 22    | 24  | 27   | 23   | 21     | 19        |         |          |          | <b>238</b>    |
|   | FastTrac Courses (2)              | 0       | 1        | 0     | 0     | 1   | 0    | 0    | 0      | 1         |         |          |          | <b>3</b>      |
|   | West Ocala Touches (?)            | 5       | 10       | 8     | 7     | 8   | 11   | 7    | 5      | 7         |         |          |          | <b>68</b>     |
|   | Marion Oaks Touches (?)           | 7       | 8        | 9     | 7     | 8   | 5    | 5    | 5      | 5         |         |          |          | <b>59</b>     |
|   | Silver Springs Shores Touches (?) | 5       | 9        | 8     | 7     | 6   | 7    | 8    | 7      | 5         |         |          |          | <b>62</b>     |









|  |                                    | January | February | March | April | May   | June   | July   | August | September | October | November | December | Total  |      |
|--|------------------------------------|---------|----------|-------|-------|-------|--------|--------|--------|-----------|---------|----------|----------|--------|------|
| <br><b>Bart Rowland</b><br>Director of<br>Job Creation         | Retention visits-200               | 21      | 20       | 27    | 16    | 26    | 21     | 16     | 17     | 26        |         |          |          | 190    |      |
|  | New jobs created-375               | 0       | 0        | 20    | 64    | 20    | 0      | 60     | 0      | 38        |         |          |          | 202    |      |
|  | Capital Invest.-\$6MM              | \$5.40  | \$0      | \$4   | 1     | 0.6   | \$1.50 | \$5.00 | \$0    | \$2.5     |         |          |          | \$17.5 |      |
|  | Talent Center referrals-90         | 18      | 28       | 18    | 13    | 12    | 23     | 2      | 4      | 16        |         |          |          | 134    |      |
|  | Inside Ind. Ocala avg 50           | X       | X        | X     | X     | X     | X      | X      | X      | 100       | X       |          |          |        | 100  |
| <br><b>Beth McCall</b><br>Director of<br>Talent<br>Development | One-on-one meetings-30             | 5       | 6        | 5     | 8     | 9     | 5      | 7      | 5      | 4         |         |          |          | 54     |      |
|  | Committee meetings-20              | 2       | 5        | 2     | 5     | 1     | 0      | 0      | 2      | 8         |         |          |          | 25     |      |
|  | CTE meetings-20                    | 1       | 1        | 3     | 0     | 4     | 5      | 1      | 1      | 5         |         |          |          | 21     |      |
|  | NEXTworking-400 studs, 70 bus      | X       | X        | X     | 75/6  | 13/3  | X      | X      | X      | x         |         |          |          |        | 88/9 |
|  | School Board Engagement            |         |          |       |       |       |        |        |        | 5         |         |          |          |        | 5    |
|  | Educator engagements-20            | 7       | 2        | 8     | 13    | 1     | 8      | 10     | 0      | 0         |         |          |          |        | 49   |
| <br><b>Drew Morrison</b>                                     | LLH Website Visits (2k/mo)         | 5,788   | 5,210    | 6,138 | 6,378 | 4,892 | 3,251  | 3,173  | 3,326  | 2,562     |         |          |          | 40,718 |      |
|  | LLH Relo Guides Sent (20/mo)       | 26      | 33       | 15    | 38    | 43    | 21     | 19     | 23     | 19        |         |          |          | 237    |      |
|  | Sites & Buildings Online Marketing | ✓       | ✓        | ✓     | ✓     | ✓     | ✓      | ✓      | ✓      | ✓         |         |          |          |        | 0    |

|  |                                   |   |   |   |   |   |   |   |   |   |  |  |  |           |
|--|-----------------------------------|---|---|---|---|---|---|---|---|---|--|--|--|-----------|
| <b>BYCE MORTISON</b>                   | Update for<br>Consultants/Brokers | X | X | X | 2 | 3 | 1 | 2 | 3 | 2 |  |  |  | <b>13</b> |
| Director of<br>Business<br>Development | Project Discussion<br>Meeting     | 1 | 1 | 2 | 3 | 5 | 4 | 4 | 4 | 4 |  |  |  | <b>28</b> |

|   |                                    | January  | February | March  | April   | May      | June    | July     | August  | September | October | November | December | Total           |
|---|------------------------------------|----------|----------|--------|---------|----------|---------|----------|---------|-----------|---------|----------|----------|-----------------|
| <br><b>Tom James</b><br>Director of<br>Networking &<br>Partner Services | Executive Partner Visits-86        | 3        | 4        | 6      | 4       | 5        | 7       | 5        | 7       | 7         |         |          |          | <b>48</b>       |
|   | Exec Partner Events-10             | X        | X        | X      | 1       | X        | 2       | 1        | x       | 1         |         |          |          | <b>5</b>        |
|   | Sponsorship rev - \$100,000        | \$14,500 | \$7,400  | 11,750 | \$4,500 | \$11,700 | \$5,750 | \$30,000 | \$6,000 | \$7,500   |         |          |          | <b>\$99,100</b> |
|   | Business After Hours - 4,200       | 400      | 225      | 210    | 245     | 320      | 360     | 355      | 275     | 230       |         |          |          | <b>2620</b>     |
|   | CEP 101 -144                       | 10       | 14       | 16     | 19      | 13       | 18      | 11       | 8       | 9         |         |          |          | <b>118</b>      |
| <br><b>Andrea Bailey</b><br>Director of<br>Business Services            | Tuesday Talk Attendance Average 19 | 13       | 33       | 33     | 46      | 47       | 77      | 38       | 36      | 35        |         |          |          | <b>20</b>       |
|   | Friday Talks Attendance Average 25 | 18       | 10       | 12     | 14      | 17       | 18      | 12       | 21      | 29        |         |          |          | <b>17</b>       |
|   | LOM -30 Participants               | 20       | 20       | 20     | 20      | 20       | N/A     | 34       | 34      | 34        |         |          |          | <b>25</b>       |
|   | LOMY - 35 Participants             | 28       | 28       | 28     | 28      | 28       | 40      | 40       | 40      | 37        |         |          |          | <b>33</b>       |
|   | YPO - Hold 2 events monthly        | 2        | 2        | 2      | 1       | 2        | 2       | 3        | 2       | 2         |         |          |          | <b>2.00</b>     |
| <br><b>Jess Schultz</b><br>Director of<br>Partner                     | New Partner Meetings               | N/A      | N/A      | 4      | 7       | 14       | 13      | 14       | 23      | 18        |         |          |          | <b>93</b>       |
|   | Cold Calls to Potential            | 24       | 35       | 50     | 33      | 24       | 25      | 28       | 37      | 32        |         |          |          | <b>288</b>      |
|   | New Partners this month            | 13       | 10       | 15     | 12      | 10       | 12      | 10       | 16      | 16        |         |          |          | <b>114</b>      |
|   | End of 1st Year Renewals           | N/A      | N/A      | N/A    | N/A     | 1        | 0       | 1        | 0       | 0         |         |          |          | <b>2</b>        |
|   | Upgraded Partners                  | 0        | 0        | 0      | 1       | 1        | 1       | 0        | 0       | 0         |         |          |          | <b>3</b>        |

|   |                               | January | February | March | April | May | June | July | August | September | October | November | December | Total |
|---|-------------------------------|---------|----------|-------|-------|-----|------|------|--------|-----------|---------|----------|----------|-------|
| <br><b>Louisa Barton</b><br>Director of<br>Equine<br>Engagement | Equine Meetings (10)          | 1       | 1        | 1     | 1     | 1   | 1    | 1    | 1      | 1         |         |          |          | 9     |
|   | Equine 101s (2)               | 0       | 0        | 1     | 0     | 0   | 0    | 1    | 0      | 1         |         |          |          | 3     |
|   | Farm Visits (10)              | 2       | 4        | 0     | 0     | 0   | 2    | 1    | 1      | 0         |         |          |          | 10    |
|   | Equine Events (6)             | 0       | 0        | 1     | 0     | 3   | 1    | 1    | 1      | 1         |         |          |          | 8     |
|   | Equine Industry Promotion (5) | 2       | 3        | 2     | 2     | 5   | 3    | 3    | 3      | 3         |         |          |          | 26    |
| Notes:  |                               |         |          |       |       |     |      |      |        |           |         |          |          |       |
|   |                               |         |          |       |       |     |      |      |        |           |         |          |          |       |
|   |                               |         |          |       |       |     |      |      |        |           |         |          |          |       |
|   |                               |         |          |       |       |     |      |      |        |           |         |          |          |       |
|   |                               |         |          |       |       |     |      |      |        |           |         |          |          |       |

|   |                                       | January      | February | March | April | May | June | July | August | September | October | November | December | Total |
|---|---------------------------------------|--------------|----------|-------|-------|-----|------|------|--------|-----------|---------|----------|----------|-------|
| <br><b>Rene Ibarra</b><br>VP of Finance & Operations    | Audit HR Files                        | 0            | 0        | 0     | 0     | 0   | 6    | 6    | 6      | 4         |         |          |          | 22    |
|   | 4 Annual Staff Training               | 0            | 0        | 0     | 0     | 0   | 2    | 0    | 0      | 0         |         |          |          | 2     |
|   | Payroll Submitted on Time             | √            | √        | √     | √     | √   | √    | √    | √      | √         |         |          |          | √     |
|   | Financials to Exec by the 15th        | √            | X        | X     | X     | √   | √    | X    | √      | √         |         |          |          | √     |
|   | Deposits and Invoices Weekly          | √            | √        | √     | √     | √   | √    | √    | √      | √         |         |          |          | √     |
| <br><b>Kimberly</b><br>Executive Assistant              | Past Due Outreach                     | Start in Feb | 23       | 26    | 10    | 14  | 12   | 21   | 32     | 17        |         |          |          | 155   |
|   | Check for All Reoccurring Invoices to | √            | √        | √     | √     | √   | √    | √    | √      | √         |         |          |          | √     |
|   | Renewal Report                        | √            | √        | √     | √     | √   | √    | √    | √      | √         |         |          |          | √     |
|   | Pay All Invoice                       | √            | √        | √     | √     | √   | √    | √    | √      | √         |         |          |          | √     |
|   | Ribbon Cutting Request (per Month)    | 7            | 12       | 5     | 9     | 6   | 6    | 4    | 4      | 7         |         |          |          | 60    |
| <br><b>Jim Pazda</b><br>Director of First Impressions | Monthly Invoices & Statements         | √            | √        | √     | √     | √   | √    | √    | √      | √         |         |          |          | √     |
|   | New Partner Packets                   | 18           | 18       | 28    | 17    | 24  | 26   | 13   | 14     | 20        |         |          |          | 178   |
|   | Relocation same Week                  | 12           | 44       | 26    | 26    | 22  | 18   | 21   | 16     | 11        |         |          |          | 196   |
|   | Renewal Packets                       | 53           | 11       | 52    | 34    | 39  | 40   | 54   | 61     | 52        |         |          |          | 396   |
|   | Touchpoint                            | 28           | 45       | 76    | 75    | 87  | 90   | 70   | 54     | 58        |         |          |          | 583   |

|   |                                     | January | February | March  | April  | May    | June   | July   | August | September      | October | November | December | Total/Avg.    |
|---|-------------------------------------|---------|----------|--------|--------|--------|--------|--------|--------|----------------|---------|----------|----------|---------------|
| <br><b>Kelly McAtee</b><br>Communications Specialist          | FB New Follows (Total: 9,279)       |         |          |        |        |        |        |        | 96     | 367            |         |          |          | <b>232</b>    |
|   | Facebook Posts Reach                | 18,608  | 24,211   | 27,410 | 53,339 | 22,100 | 26,917 | 33,431 | 33,657 | <b>166,088</b> |         |          |          | <b>45,085</b> |
|   | LinkedIn Posts Reach                |         |          |        |        |        |        | 11,900 | 8,300  | 3,700          |         |          |          | <b>7,967</b>  |
|   | Email Opens                         | 7,039   | 5,917    | 6,141  | 6,510  | 4,759  | 4,989  | 5,847  | 5,988  | 5,833          |         |          |          | <b>5,891</b>  |
|   | Website Reach                       | 9,863   | 5,063    | 5,942  | 5,880  | 6,214  | 6,235  | 6,012  | 6,160  | 5,691          |         |          |          | <b>6,340</b>  |
| <br><b>Sullivan Hogan</b><br>Director of Video Communications | Website Videos                      |         |          |        |        |        |        |        |        | x              |         |          |          | <b>0</b>      |
|   | Promo/Partner Videos                |         |          |        |        |        |        |        |        | x              |         |          |          |               |
|   | Event Recap Videos                  |         |          |        |        |        |        |        |        | x              |         |          |          | <b>0</b>      |
|   | Staff Highlight Videos              |         |          |        |        |        |        |        |        | x              |         |          |          | <b>0</b>      |
|   | Kevin's Corner Videos               |         |          |        |        |        |        |        |        | x              |         |          |          | <b>0</b>      |
| <br><b>Dawn Bowman</b><br>Director Ocala Downtown Market    | Increase FaceBook Followers (50 mo) | 415     | 241      | 292    | 162    | 208    | 231    | 253    | 242    | 205            |         |          |          | <b>2249</b>   |
|   | Increase Market Vendors (2 mo)      | 9       | 7        | 5      | 33     | 12     | 31     | 8      | 15     | 2              |         |          |          | <b>122</b>    |
|   | 8 Pavillion Rentals for the year    | 2       | 2        | 2      | 3      | 1      | 2      | 1      | 3      | 8              |         |          |          | <b>24</b>     |
|   | 3 self generated ODM events         | 2       | 2        | 4      | 3      | 1      | 3      | 1      | 2      | 1              |         |          |          | <b>11</b>     |
|   | Provide 2 workshops a year          | X       | X        | X      | X      | X      | x      | x      | x      | x              |         |          |          |               |