

TBD
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	4	0	2	2	48
Hold 4+ Equine Advocacy Meetings	0	0	0	0	0	1	0	0	0	0	0	0	1
4+ Partner Workshops or Roundtables	0	0	0	0	0	0	0	0	1	1	1	0	3
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Notes: Marion County Legislative Delegation Luncheon presented by AT&T and hosted by College of Central Florida on Wednesday, January 8th.



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	8	4	14	7	84
Avg. 1MC Attendees (45)	55	60	55	55	56	56	58	57	58	56	55	52	673
2024 BC Programs (4)	0	1	1	0	1	0	0	0	1	1	1	1	7
2nd Stage Programs (15)	1	1	1	1	0	0	0	0	0	0	0	0	4
GrowthBiz Prospects (12)	1	1	1	0	2	0	0	0	0	0	0	0	5








Jessica Michel
Director of
Business
Creation




PPBI Occupancy (min 50%)	86	86	78	78	83	83	90	80	80	87.5	87.5	87.5	84
Community Outreach	10	2	2	1	3	2	1	0	2	1	1	1	26
OP Produced Content 1x12	1	7	1	3	3	4	2	4	4	3	2	1	35
Resident 1 on 1 (44)	5	2	2	1	2	2	8	6	2	2	2	2	36
Graduate 3 companies	1	0	1	0	2	0	0	0	0	0	0	0	4




Open Position
Director of
IMPACT Initiative

Technical Assistance (105)	21	11	5	0	8	7	4	0	6	8	3	3	76
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
 Tom James Director of Executive Engagement	Exec Partner Visits - 175	20	29	17	15	22	18	20	16	20	19	24	19	239
	Exec Partner Events-10	x	x	2	x	1	1	1	1	x	1	1	1	9
	Exec. Tier Introductions	8	8	10	5	5	10	8	8	3	6	6	7	84
	Sponsorship Rev - \$260K	\$36,000	\$6,500	\$10,700	\$29,600	\$7,500	\$12,500	\$7,500	\$24,500	\$54,000	\$45,000	\$19,000	\$34,000	\$286,800
	CEP 101 200 Attendees	19	x	24	19	22	12	16	21	15	6	x	13	167
 Andrea Bailey Director of Business Services	Tuesday Talks 18 Attendees	24	15	31	10	50	50	26	8	20	20	17	7	23
	Friday Talks 18 Attendees	54	20	17	22	30	15	23	25	8	4	8	0	19
	LOM 30 Participants	30	30	30	30	30	X	37	37	36	36	36	36	33
	LOMY 33 Participants	33	33	35	35	38	38	38	38	38	38	38	38	37
	EM Breakfast 380 Attendees	436	285	308	351	395	302	303	338	425	352	299	246	337
 Jess Schultz VP of Partner Engagement	Partner Events (10)	8	12	14	9	8	9	6	10	8	9	8	9	110
	Partner Meetings (15)	26	22	20	19	15	12	20	26	18	25	16	17	236
	Business After Hours (400)	482	350	330	460	340	380	350	350	360	400	390	300	4492
	Bview Events AM+PM (500)	2500	500	370	380	263	302	400	320	95	290	-	250	5670
	Other Events (100)	120	95	103	145	183	92	150	120	270	180	85	22	1565

	January	February	March	April	May	June	July	August	September	October	November	December	Total	
 Joe Reichel Director of Belleview CEP	BCEP New Partners	9	8	7	3	9	7	5	4	5	1	1	3	62
	BCEP Cold Calls	300	30	180	175	77	53	40	35	28	32	73	12	1035
	BCEP New Partner Meetings	9	13	6	6	15	10	12	8	10	4	6	6	105
	BCEP Sponsorship	\$6,000	\$800	7600	\$1,600	\$0	3000	\$0	1800	\$0	\$0	\$0	600	\$21,400
	BCEP Partner Upgrades	0	0	0	1 (\$1900)	0	0	0	0	1 (\$4400)	0	0	0	2
 Jim Pazda Director of Business Services	Partner Touches	98	111	104	108	90	82	77	81	95	88	77	69	1080
	Retained Partners	8	13	10	10	11	13	8	7	15	5	4	2	106
	Partner Upgrades	4	2	2	2	2	1	0	1	3	2	0	1	20
	Value of Upgrades	\$ 37,500	\$5,000	\$45,000	\$7,500	\$3,700	\$2,500	\$0.00	\$2,500	\$27,500	\$3,700	\$0	\$ 2,500	\$ 137,400
	Partner Events	26	25	24	22	38	57	38	80	55	48	37	48	498

	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	50	34	40	45	570
	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	27	23	18	12	259
	Relocation Packets two Week (80)	7	10	9	9	7	6	8	4	5	8	4	3	80
	Renewal Packets (720)	76	63	44	81	101	43	90	66	41	33	54	83	775
	Touchpoint Postcards (1,000)	79	116	56	98	73	91	90	67	73	114	83	96	1036
 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	4	6	7	4	70
	Verify that all bills recorded in the accounting software	√	√	√	√	√	√	√	√	√	√	√	√	√
	Record credit card charges (Weekly Basis) (50)	5	5	4	4	4	4	6	8	7	8	6	5	66
	Operational Meetings (50)	4	4	5	10	6	2	5	4	4	4	2	3	53

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 Jessica Gilbert VP Foundation for CEP	Grant Funding Secured (G:\$100k)	0	0	N/A	-	-	10,000	-	0	0	5,000	0	10,000	25,000
	Submitted Grant Apps (Goal: 12)	1	0	N/A	1	2	2	2	1	1	0	0	0	8
	Income (Goal: \$250k)	TBD	0	N/A	0	0	0	0	0	0	0	0	0	-
	Foundation Visits (Goal:36)	3	0	N/A	1	2	2	5	5	4	5	8	5	40
	Podcast Downloads (Goal: 800)	79	0	N/A	29	27	28	32	29	42	35	12	22	335
 Sullivan Hogan Director of Video Communications	Weekly Buzz Views (Goal: 32,000)	2885	3158	2806	4566	5560	4159	5358	6617	3936	5558	4643	4534	53,780
	CEP on the Scene Views (Goal: 10,000)	480	690	644	N/A	4793	1849	773	1463	1180	525	1435	585	14,417
	POV Views (Goal: 20,000)	1440	1594	1470	3074	2845	4090	2568	1874	3745	2089	5966	2133	32,888
	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	158	1147	N/A	N/A	2,300
	Additional Internal Videos (Goal: 20)	1	2	0	1	2	1	2	0	0	0	1	2	12
 Arin Conrad Director of Communications & Marketing	FB New Follows (Goal: 1,200)	155	141	125	154	127	121	107	79	67	62	115	60	1,313
	Facebook Posts Reach (Goal: 425,000)	55,166	102,602	61719	62335	52839	53,878	62595	21734	33,100	18,000	38,000	19,700	581,668
	LinkedIn Posts Reach (Goal: 80,000)	10,500	8300	9500	6500	13600	10,500	8923	7123	9125	8456	9008	13,097	114,632
	Email Opens (Goal:150,000)	26,698	26046	21534	14867	12114	18469	19591	24895	17391	29137	17989	10749	239,480
	Website Reach (Goal: 95,000)	10,217	22885	9095	5600	5284	8557	7895	8432	9958	5188	4967	6661	104,739

