

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			44
Hold 4+ Equine Advocacy Meetings	0	0	0	0	0	1	0	0	0	0			1
4+ Partner Workshops or Roundtables	0	0	0	0	0	0	0	0	1	1			2
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Notes:	Equine Advocacy canceled due to Hurricanes.												

	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	1	0		7
	Primary Contact Meetings (12)	0	0	2	1	4	1	4	3	4	4		23
	Assist With Youth Biz Plan Comp. (1)	0	0	1	1	0	0	0	0	1	0		3
	NEXTworking (400 students)	Fall	Fall	Fall	Fall	Fall	Fall	Fall	Fall	150	100		250
	NEXTworking (70 industry experts)	Fall	Fall	Fall	Fall	Fall	Fall	Fall	Fall	36	25		61
 Evelyn Reyes VP, Business Creation	Create 1 Biz Procurment Event	0	0	0	0	0	0	1	0	0			1
	Create 1 Biz Access to Capital Event	0	0	0	0	0	0	0	0	1			1
	1-on-1 With (20) Lenders	4	1	6	4	5	6	3	4	3	3		39
	1-on-1 With (20) Strategic Partners	2	3	7	6	7		4	10	2	4		45
	Silver Springs Shores Occupancy (50)	Not Open	Not Open	Not Open	June 19th	June 19th	33%	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	8	4			63
Avg. 1MC Attendees (45)	55	60	55	55	56	56	58	57	58	56			566
2024 BC Programs (4)	0	1	1	0	1	0	0	0	1	1			5
2nd Stage Programs (15)	1	1	1	1	0	0	0	0	0	0			4
GrowthBiz Prospects (12)	1	1	1	0	2	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			83
Community Outreach	10	2	2	1	3	2	1	0	2	1			24
OP Produced Content 1x12	1	7	1	3	3	4	2	4	4	3			32
Resident 1 on 1 (44)	5	2	2	1	2	2	8	6	2	2			32
Graduate 3 companies	1	0	1	0	2	0	0	0	0	0			4

Open Position
Director of
IMPACT Initiative

Technical Assistance (105)	21	11	5	0	8	7	4	0	6				62
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		196
	Exec Partner Events-10	x	x	2	x	1	1	1	1	x	1		7
	Exec. Tier Introductions	8	8	10	5	5	10	8	8	3	6		71
	Sponsorship Rev - \$260K	\$36,000	\$6,500	\$10,700	\$29,600	\$7,500	\$12,500	\$7,500	\$24,500	\$54,000	\$45,000		\$233,800
	CEP 101 200 Attendees	19	x	24	19	22	12	16	21	15	6		154
 Andrea Bailey Director of Business Services	Tuesday Talks 18 Attendees	24	15	31	10	50	50	26	21	20	20		27
	Friday Talks 18 Attendees	54	20	17	22	30	15	23	25	8	4		22
	LOM 30 Participants	30	30	30	30	30	X	37	37	36	36		33
	LOMY 33 Participants	33	33	35	35	38	38	38	38	38	38		36
	EM Breakfast 380 Attendees	436	285	308	351	395	302	303	338	425	352		350
 Jess Schultz VP of Partner Engagement	Partner Events (10)	8	12	14	9	8	9	6	10	8	9		93
	Partner Meetings (15)	26	22	20	19	15	12	20	26	18	25		203
	Business After Hours (400)	482	350	330	460	340	380	350	350	360	400		3802
	Bview Events AM+PM (500)	2500	500	370	380	263	302	400	320	95	290		5420
	Other Events (100)	120	95	103	145	183	92	150	120	270	180		1458



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	5	1			58
BCEP Cold Calls	300	30	180	175	77	53	40	35	28	32			950
BCEP New Partner Meetings	9	13	6	6	15	10	12	8	10	4			93
BCEP Sponsorship	\$6,000	\$800	7600	\$1,600	\$0	3000	\$0	1800	\$0	\$0			\$20,800
BCEP Partner Upgrades	0	0	0	1 (\$1900)	0	0	0	0	1 (\$4400)	0			2
Partner Touches	98	111	104	108	90	82	77	81	95	88			934
Retained Partners	8	13	10	10	11	13	8	7	15	5			100
Partner Upgrades	4	2	2	2	2	1	0	1	3	2			19
Value of Upgrades	\$ 37,500	\$5,000	\$45,000	\$7,500	\$3,700	\$2,500.00	\$0.00	\$2,500.00	\$27,500.00	\$ 3,700.00			\$ 134,900
Partner Events	26	25	24	22	38	57	38	80	55	48			413



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	50	34		485
	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		229
	Relocation Packets two Week (80)	7	10	9	9	7	6	8	4	5	8		73
	Renewal Packets (720)	76	63	44	81	101	43	90	66	41	33		638
	Touchpoint Postcards (1,000)	79	116	56	98	73	91	90	67	73	114		857
 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		59
	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		55
	Operational Meetings (50)	4	4	5	10	6	2	5	4	4	4		48

		January	February	March	April	May	June	July	August	September	October	Nov	Dec	Total
 Jessica Gilbert VP Foundation for CEP	Grant Funding Secured (G:\$100k)	0	0	N/A	-	-	10,000	-	0	0	5,000			15,000
	Submitted Grant Apps (Goal: 12)	1	0	N/A	1	2	2	2	1	1	0			8
	Income (Goal: \$250k)	TBD	0	N/A	0	0	0	0	0	0				-
	Foundation Visits (Goal:36)	3	0	N/A	1	2	2	5	5	4	5			27
	Podcast Downloads (Goal: 800)	79	0	N/A	29	27	28	32	29	42	35			301
 Sullivan Hogan Director of Video Communications	Weekly Buzz Views (Goal: 32,000)	2885	3158	2806	4566	5560	4159	5358	6617	3936	5558			44,603
	CEP on the Scene Views (Goal: 10,000)	480	690	644	N/A	4793	1849	773	1463	1180	525			12,397
	POV Views (Goal: 20,000)	1440	1594	1470	3074	2845	4090	2568	1874	3745	2089			24,789
	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			2,300
	Additional Internal Videos (Goal: 20)	1	2	0	1	2	1	2	0	0	0			9
Director of Social Media & Marketing	FB New Follows (Goal: 1,200)	155	141	125	154	127	121	107	79	67	62			1,138
	Facebook Posts Reach (Goal: 425,000)	55,166	102,602	61719	62335	52839	53,878	62595	21734	33,100	18,000			523,968
	LinkedIn Posts Reach (Goal: 80,000)	10,500	8300	9500	6500	13600	10,500	8923	7123	9125	8456			92,527
	Email Opens (Goal:150,000)	26,698	26046	21534	14867	12114	18469	19591	24895	17391	29137			210,742
	Website Reach (Goal: 95,000)	10,217	22885	9095	5600	5284	8557	7895	8432	9958	5188			93,111

