





Bart Rowland,
MEDP
VP of Job Creation

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Retention Visits (150)	12	18	18	19	17	19							103
New Jobs Created (400)	28	0	20	0	0	0							48
Capital Invest. (\$40MM)	25	1 . 6	1 . 5	0	0	2 . 5							30 . 6
Prospect Visits	1	5	3	7	2	2							20
Corporate Visits (2)	0	0	0	0	0	0							0
HC Council/ Insider (150)	65	52	32	0	34	0							183
Healthcare Retention Visits	2	2	1	2	3	4							14
HC Conf/ Trade Show(6)	0	1	1	2	1	0							5
HC Exc. Tier Touch Base/Mtg.(15)	2	3	1	1	1	2							10
Healthcare Incubator	✓	✓	✓	✓	✓	✓							✓



Erin Jones
Director of
Healthcare
Development



		January	February	March	April	May	June	July	August	September	October	November	December	Total
 Beth McCall Director of Advocacy & Talent Development	Attend 4+ Gov Meetings	3	2	2	3	4	0							14
	4+ Partner Workshops or Roundtables	1	0	0	0	1	2							4
	Construction Academy meetings (12)					0	2							2
	NEXTworking (400 students)					1	1							2
	NEXTworking (70 industry experts)					1	1							2
 Evelyn Reyes VP, Business Creation	Incubator Partner /Prospects Meetings	11	3	6	4	0	2							26
	Business Educational Workshops 6	0	1	2	1	1	0							5
	Strategic Partner Meetings (24)	2	4	4	13	15	2							40
	OMCF Loans (6)	1	0	0	0	0	2							3
	CDFI Board Meetings	1	0	0	0	1	0							2



January February March April May June July August September October November December Total



Tom James

Director of
Executive
Engagement

Exec Partner Visits - 175	20	17	20	21	30	18								126
Exec Partner Events-10	\$1	0	1	0	2	0								4
Exec. Tier Introductions	6	10	7	7	7	7								44
Sponsorship Rev - \$260K	\$16,000	\$12,500	\$2,500	\$16,000	\$29,000	\$13,500								\$89,500
CEP 101 200 Attendees	20	x	39	21	16	13								109



Andrea Bailey

Director of
Business Services

Tuesday Talks 24 Attendees	11	18	20	22	16	15								17
Friday Talks 20 Attendees	30	10	16	8	15	10								15
LOM 35 Participants	36	36	36	36	36	-								36
LOMY 38 Participants	38	38	38	38	38	-								38
EM Breakfast 340 Attendees	350	320	265	295	320	300								308



Jess Schultz

VP of Partner
Engagement

Partner Events (10/mo)	6	14	10	9	9	14								62
Partner Meetings (15)	18	26	29	20	19	13								21
Engagement Events (150att/mo)	3	105	210	157	130	105								118
Bview Events AM+PM (300)	270	290	285	260	245	290								273
Other Outreach (100)	62	220	90	72	65	65								96



Joe Reichel

Director of
Bellevue CEP




		January	February	March	April	May	June	July	August	September	October	November	December	Total
	BCEP New Partners	3	7	2	5	5	3							25
	BCEP Cold Calls	99	117	145	183	129	289							962
	BCEP Partner Meetings	6	46	22	36	32	21							163
	BCEP Sponsorship \$	\$1,600	\$600	\$1,350	\$1,850	\$2,850	0							\$8,250
	Engagement/ Outreach	25	168	167	183	129	150							822
	Partner Touches	80	77	66	58	66	70							417
	Retained Partners	6	3	7	12	6	7							41
	Partner Upgrades	1	3	1	3	3	0							11
	Value of Upgrades	\$ 30,000	\$15,000	\$5,000	\$32,400	\$31,000	\$0							\$ 113,400
	Partner Events	44	53	55	52	48	61							313






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	30	15	69	51									30
	Verify Partner Billing	✓	✓	✓	✓									✓
	Renewal Report	✓	✓	✓	✓									✓
	Pay All Invoice	✓	✓	✓	✓									✓
 Donna Director of First Impressions	Monthly Invoices & Statements	✓	✓	✓	✓	✓	✓							✓
	New Partner Packets (250)	22	34	30	15	23	27							101
	Relocation Packets two Week (80)	5	4	8	2	8	10							19
	Renewal Packets (720)	83	69	83	80	44	61							315
	Touchpoint Postcards (1,000)	86	60	61	64	48	22							271
 Amie Marsh Director of Finance & Operations	Ensure receipts for all CC charges (Weekly) (50)	✓	✓	✓	✓	✓	✓							✓
	Resolve Partner Billing Discrepancies (Weekly) (50)	14	91	21	18	82	23							126
	Verify bills are in the accounting software have support (Weekly) (50)	✓	✓	✓	✓	✓	✓							✓
	Record credit card charges (Weekly) (50)	4	3	5	5	7	1							12
	Renewal Letters & Invoices	✓	✓	✓	✓	✓	✓							



		January	February	March	April	May	June	July	August	September	October	Nov	Dec	Total
 Jessica Gilbert VP Foundation for CEP	Grant Funding Secured (G:\$100k)	\$60,000	\$0	\$300,000	\$0	\$10,000	\$11,000							\$381,000
	Submitted Grant Apps (Goal: 12)	0	0	2	0	2	1							2
	Income (Goal: \$250k)	\$60,000	\$0	\$360,000	\$0	\$10,000	\$11,000							\$381,000
	Foundation Visits (Goal:36)	4	8	6	5	8	6							37
	Podcast Downloads (Goal: 800)	28	26	22	21	0	0							97
 Sullivan Hogan Director of Video Communications	Weekly Buzz Views (Goal: 32,000)	5024	7666	6706	4357	5674	3778							33,205
	CEP on the Scene Views (Goal: 10,000)	585	376	2183	2257	3458	486							9,345
	POV Views (Goal: 20,000)	2582	1890	2860	1956	2340	1841							13,469
	A Closer Look & Leading the Way View (Goal: 5,000)	N/A	N/A	N/A	N/A	n/a	500							500
	Additional Internal Videos (Goal: 20)	2	2	0	1	0	1							6
 Arin Conrad Director of Communications & Marketing	FB New Follows (Goal: 1,200)	133	245	206	259	181	175							1,199
	Facebook Posts Reach (Goal: 425,000)	78,941	113,593	91,364	104,766	41,913	48,948							479,525
	LinkedIn Posts Reach (Goal: 80,000)	6,248	4,528	4,508	6,522	5,510	6,584							33,900
	Email Opens (Goal: 50% Average)	55%	49%	47%	47%	46%	44%							48%
	Website Reach (Goal: 95,000)	6,641	8,809	7,180	7,054	6,906								36,590



June
2025

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Freddie Morris

Director of
Entrepreneurship
Services

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Business Consultations (100)	10	10	11	11	6	9							57
Business Educational Workshops (25)	0	5	5	7	4	3							24
Startup Space Report	7	63	65	60	61	76							332
Community Outreach (24)	2	3	2	2	2	2							13
1MC Attendance	49	50	55	65	58	56							333
Incubator Partner /Prospects Meetings(100)	2	2	1	2	2	2							11
Community Outreach (24)	2	1	2	3	1	4							13
Incubator Community Presentations (24)	1	1	2	1	1	0							6
PPBI Social Media Report	1873	1929	2,163	2192	2203	2296							12656
Incubators Occupancy	68%	70%	70%	0.72	72%	84%							73%



Jessica Michel

Director of
Incubators