



Tamara
Fleischhaker

Chief eXperience
Officer

Business Advocacy

Inter-City Visit - The Quest: Savannah: Due to challenges in working with Savannah VCB and securing hotel, will postpone until late April (23-25) 2024.

Attend 4 Government Meetings or Workshops: 12/5 - MCBCC Public Hearing on Sales Surtax Renewal, 12/5 - Ocala City Council Meeting, 12/19 - MCBCC Meeting P&Z

Hold quarterly Equine Advocacy Council Meetings: Held on December 6th with discussion on immigration, MCPS Equine Education partnership, equine quarantine center, program support through Foundation for CEP, Walk of Champions/VCB Application, and Hobby Horse Equestrian Games/Equine Industry Expo.

Host at Least 4 Workshops / Roundtables on Business Issues: Procurement workshops on hold until early 2024.

Initiate Tourism Model Recommendations Study: With a lack of funding support and other major initiatives in conflict, this Strategic Plan item will be delayed to 2025, to allow for focus on the anticipated Sales Surtax renewal campaign in 2024.



N/A

Director of
Business
Advocacy

Business Advocacy

Kelli Holt, Director of Business Advocacy starting on January 3, 2024

Notes:



Shubirg

Chief Growth
Officer

Growth

Attended Area Developments Annual Consultant Forum in Ft. Lauderdale. Met with 10 consultants during the event.

Continued Economic Impact Catalyst Software Implementation for Business Creation

Team Events - Silver Springs Shores Incubator Updates; Healthcare Incubator Updates

Project Activity - Virgo, Matador, Additive, Peak, Taylor

Planning for Consultants Weekend in February 2024.



Bart Rowland

VP of Job
Creation

Job Creation

I attended the Advanced Aviation Mobility event at MCO Orlando. This informative event brought together aviation industry experts, engineers, manufacturers, and other stake holders to discuss the future of air travel in Florida.

Our team had a very productive meeting with Ben Dawson from SECO Energy. Our discussion included Project Fantasy, the Florida Crossroads Commerce Park, Trailhead Logistics Park, and increasing our engagement with their team.

One of our main areas of focus for 2024 is to identify potential sites for development. This strategy will ensure our efforts are intentional, collaborative, and forward thinking.

Project Additive continues to move forward and discussions with the company, property owner, brokers, lobbyist, Duke Energy, Florida Northern Railroad, TECO, and Marion County staff continue. Very competitive FDI manufacturing project - would create 230 new jobs and more than \$55 million in capital investment.

Other project activity - Football, Cardboard, Rusty, Rocky, Fantasy, France, Matador, and Ray.



Bryce
Morrison

Director of
Business

Business Development

LLH had 1,120 webvisits. Drop due to Holidays and mid-month reporting.

We did not submit any RFI's this month.

I attended the Next-Gen Food and Beverage Manufacturing conference this month. In attendance with Joel from Duke Energy, we discussed food and beverage opportunities with consultants in that space. Additionally, a new report from GLS about our advantages has come out we'll use to further promote our region.

Several discussions at Food and Beverage with consultants about Ocala. Meetings with GLS about LASSO and site promotion. Several meetings relating to Project Additive.

Updated Sites & Buildings as necessary.



Erin
Jones

Director of
Healthcare
Development

Healthcare Development

2024 Healthcare council Planning for January Kick off lunch hosted and sponsored again by World Equestrian Center; additional outside life science representatives to attend for government affairs to consultants.

Healthcare ecosystem expansion on the rise with new locations and expanded workforce. Seeing companies with multiple locations in Lake and Marion utilize LEAD connections

Life Science Company Kismet Technology headed our November EM. Currently have 3 test Pilots in Ocala market with both Equine and Human facility, which are going very well. Next steps are expanded research collaborations.

Project Activity around lifescience in the market is growing. Adding consultants specific to this area and key players to the 2024 consultant weekend for expanded visibility.

Sphere Life Science Flex Space discussion with additional interested party in January 2024



Beth
McCall

Director of
Talent

NextWorks

One-on-One Meetings:

Committee, Events & School Board Meetings: December 5 - County Commission Sales tax workshop / December 14 - TDC Annual Meeting / December 15 - United Way Education Vision Council

CTE Meetings:

NEXTworking:

School Board & Superintendent engagement: December 6 - Eric Cummings / December 12 - Sarah James / December 12 Nancy Thrower / December 13 & 14 - Diane Gullet /

Educator Engagements:



Jessica
McCallum
Director of
Business
Creation

Power Plant Incubator

Total Occupancy at the PPBI - 84%. 11 Residents currently at Incubator. Some residents will be moving around the office for new year

Averaged 55 in person at 1 Million Cups Ocala and had our holiday party! Working with Hands Up Communications to interpret each week. We start back up on January 3

Resident Touch-point/Benchmarks: Sent out Q4 benchmarks. Power Plant Website is live

Programming: FastTrac class at the PPBI graduated on December 12th. We had 9 students complete the class

Total Jobs Created at the PPBI: 700



Cherrietta
Prince
Director of
Impact

Impact Initiative

Co-sponsored Community Meeting with Estella Byrd Whitman Medical Facility at Mary Sue Rich Center; shared information about the IMPACT Initiative. A survey was conducted about community awareness of the medical services available at the Byrd Center.

Fifteen entrepreneurs completed IMPACT FastTrac® and discovered many critical business techniques and strategies at Marion Oaks Community Center.

Shared business resources with emerging entrepreneurs at the annual NAACP Taste of Soul event.

Disseminated information about the IMPACT Initiative and shared resources with entrepreneurs at the Latin Food & Artisan Market hosted by Carmen Garcia.

Interviewed Maria Conception, owner of UBS Staffing Services and a recent graduate of IMPACT FastTrac® at Marion Oaks. The IMPACT Review video series is sponsored by Duke Energy and posted at ocalacep.com & Facebook at OcalaCEPIMPACT.



Tyler
LeCompte
Director of
Entrepreneurship
Services

2nd Stage Businesses

Technical Assistance - Assisted FIVE (5) Entrepreneurs with Technical Assistance Appts

CDFI - 501c3 Approved, CDFI Certification Process Started exp 2024, Nanoloan Program launched (Applications pending Review)

2023 BC Programs - Two (2) FastTrac program Graduations Completed, EIR Academy Completed, 1MC Ocala Completed

2nd Stage Programs - EiR:Financial Literacy 2024 Programs in Development - StartupSpace Platform Launch Jan2024

GrowthBiz Prospects - One (1) FL-based Venture Capital group



Tom James

Director of
Executive
Engagement

Sponsorship & Executive Tier

Executive Partner Visits: Ameris Bank, Geo-Tech, Market Street at Health Brook, Cogent Bank, SMA Healthcare, Advanced Welding, Seacoast Bank, World Equestrian Center, James Moore, Optimum RV, HCA Florida Ocala Hospital, VyStar Credit Union, Reveille Wealth Management, Striker, Brookdale Chambrel Pinecastle, Gulf Atlantic Bank, Showcase Properties.

*Executive Roundtable Lunch, Sponsored by: Foster Bachschmidt was held Dec. 7th at the Reilly Arts Center with 52 CEP Partners in attendance.

Sponsorships: Reveille Wealth Management (Presenting Sponsor 2024 Biannual Chairmans Lunch), Cogent Bank (Presenting Sponsor of the Ocala Metro Economic Overview), SMA Healthcare (Sponsor: January EM Breakfast), Duke Energy (2024 CEP Annual Luncheon Sponsor), College of Central Florida (2024 CEP Annual Luncheon Sponsor), Conrad Tree Services/Patriot Waste Containing (CEP Weekly Buzz).

Business After Hours in December was held at Brookdale Chambrel Pinecastle for the traditional Festival Of Trees, wiith 345 people in attendance.

CEP 101: Sponsored by Deem-it, held its combo Nov/Dec session on Dec. 6th with 16 people on hand.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > December 5 - Leslie Nottingham with City and MCA - State of Arts in MC (14 CEP partners)

Friday Talks > December 15 - The Struggle is Real with Karla Greenway, Interfaith Emergency Services (CEP partners)

Leadership Ocala Marion (LOM) > LOM Local Govt Session - OEU, City Hall, IHMC, MCBCC and County Engineering (30 students)

Leadership Ocala Marion Youth (LOMY) > Government Session with Chief Balken, Craig Curry, Kristen Dreyer, and mock BCC Meeting (35 students)

exCEptional Mornings > December 20 - US Attorney for Middle Districry of FL Roger B. Handberg (CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

Partner Events (RC, etc; 6/month): 8 ribbon cuttings/groundbreakings

Partner Meetings (8/month): 9 meetings with current partners

Business After Hours (400/month): 375 attendees (approximate)

Upgraded Partner Revenue (yearly goal \$100,000): \$11,400

Other events:CEP201, NetPerking, MBA, Happiest Hour, Pres Lunch, Networks, etc (45/month): 120 attendees total



Louisa Barton

Director of
Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Initiative Special Christmas Meeting, presented by Pyranha was held at Olympian Sharn Wordley's farm with a presentation and refreshments by Wildlife Works. Also, Sharn presneted his new business Equine Design and Development Collective.

Equine 101: N/A

Farm/Venue/School Visit: Reddick Collier Elementary for fence planning meeting for Doc, the school horse

Equine Events: N/A

Equine Industry Promotion: Wrote the Equine Enewsletter and Ocala Magazine Everything Equine section. Attended the first Annual Tourism Meeting at the Hilton. Held a well attended Equine Advocacy Meeting to cover some major equine industry topics including immigration, the plaques for sidewalks and the equine quarantine.



Jim
Pazda
Director of
Partner Services

Partner Services

Partner Touches: 60 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 11 partners retained from 60-90+ days past due

Partner Upgrades(2): Wawa - Business---> Premium ; Taylor College - Premium---> Leadership

Notes



Bryan Aman

CFO

Finance

Complete a quarterly audit on all AP/AR files

Provide monthly finances to the team

Complete Bi-monthly payroll submissions.

Complete monthly financials for all companies and report to BOD

Process all deposits and invoices on a weekly basis.



Kimberly
Langley

Executive
Assistant

Finance & Administrative Support

Past Due Outreach - 61

Verify All New Partners Billing: Dec 2023

Pull Renewal Report - Dec 2023

Pay All Open Invoices Weekly - Dec 2023



Amie Marsh

Director of
First Impressions

First Impressions

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



Hogan
Director of Video
Communications

Communications

Weekly Buzz Views:

CEP on the Scene Views:

POV Ocala Views:

A Closer Look Views: N/A

Additional Internal Videos:



Kelly McAtee
Director of Social
Media &
Marketing

Communications

New Facebook page followers were at 70 with 12,172 total followers.

FACEBOOK Page monthly post reached 55,255 | Post engagements at 8,348 | Top posts were ribbon cuttings (Wear Gloves-2629, Karishma Boutique-3188, New Season-260, Essex Mortgage-2140, U-Dump Trailers-1740, Zone West-2074, WHR Associates-1970, BEMER-1810), Podcast 9-10 (1,632), Friday Talks (1,097), Tuesday Talks (1,216), EM Flyer (661), EM Photos (1,572), BAH Flyer (2,620), BAH Photos (2,746), Weekly Buzz (ep 240 - 243 - 4,240), CEP On The Scene (1,025), POV (1,070), Portraits of Success 12th episode (252), A Closer Look Ep 6 (8634), YPO Ugly Sweater (687), CEP team B-days (1,291), CEP xmas Party (2,705), YPO Ugly Sweater (2,785), CEP Ambassador Enrollment (1,225), Heart of Fl Hiring (1,516) | FACEBOOK Group monthly Reach: 5,330 | INSTAGRAM monthly reach: (3 accounts, CEP, ODM, Equine) - 1,364 CEP, 1,524 ODM, 61 Equine

Number of people opening email blasts are at an increase of 14,679 opens.

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 7,136.

LinkedIn insights continue to increase followers based on the number of posts shared each month. LinkedIn views at an all time high from prior months due to new CEP video series postings. Number of new post impressions is at 6,800 reach with 2,563 followers.



Dawn
Bowman
Director
Ocala Downtown
Market

ODM

Increase FaceBook Followers (50/mo): Currently 22,446 Facebook followers ODM (up 226) Currently 2798 IG (up 81)

Increase Market Vendors (2/mo): Jan 357, Feb 335, March 304, April 394, May 308, June 306, July 379, Aug 317, Sept 460, Oct 425, Nov 413, Dec 377

24 Pavillion Rentals for the year: Jan 3, Feb 4, March 6, April 4, May 5, June 3, July 4, Aug 4, Sept 7, Oct 6, Nov 7, Dec 6= 59

12 Self-generated ODM events: Jan 0, Feb 1, March 1, April 2, May 0, June 1, July 1, Aug 1, Sept 1, Oct 1, Nov 1, Dec 1= 11

Provide 2 workshops a year: 1 June Instagram, 1 July Instagram



Natalie
McComb

VP Foundation for
CEP

Foundation

Duke Energy Foundation's \$20k was received early in the month.

Submitted Kroger Grant application for StartUp Space. Submitted request proposal to Citizen's First Bank for CDFI funding. Continued work on the Scaife Foundation application for Equine Education.

Minimal income in November. P&L not yet available for December.

Met with Cindi Falanga on CFB ask towards CDFI funding. Met with Joe and Sara (AdventHealth) to help facilitate update on Belleview CEP expansion and AdventHealth's involvement. Met with Addie (Jungle Boys) on ELA sponsorship ask.

Continued studying for CFRE test in January.



Director of
Operations

Operation

CEP on the Scene - 2

Toured Shores Incubator



N/A

Director
of Finance