




August  
2024

CEP Ocala Metro CHAMBER & ECONOMIC PARTNERSHIP				Performance Matrix Business Advocacy										August 2024	
 Kelli Holt 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					40	
	Hold 4+ Equine Advocacy Meetings	0	0	0	0	0	1	0	0					1	
	4+ Partner Workshops or Roundtables	0	0	0	0	0	0	0	0					0	
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	Notes:														



Bart Rowland,  
MEDP

VP of Job  
Creation

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Retention Visits (200)	15	15	15	12	15	16	18	23					129
New Jobs Created (400)	48	0	50	0	0	0	500	0					598
Capital Invest. (\$40MM)	\$3	0	4	16	3	43	37	6					\$112.0
Primary Employer Events	0	1	0	0	0	0	0	0					1
Corporate Visits (2)	0	0	0	0	0	0	1	0					1



Erin Jones

Director of  
Healthcare  
Development

HC Council/ NEXtworking (150)	65	0	38	0	0	36	0	35					174
Comm. Touchpoint (120)	25	20	25	20	18	15	10	12					145
HC Conf/ Trade Show(2-4)	1	1	0	3	0	1	0	0-					6
HC Exc. Tier Touch Base/Mtg.(15)	5	4	6	3	2	1	1	2					24
Healthcare Insider (100)	0	0	55	0	31	0	0	0					86



Bryce  
Morrison



Director of  
Business

LLH Website Visits (20k)	1,315	1,789	1,697	1,625	1,576	1,593	1,922	1,766					13,283
RFT's (10/yr)	2	1	2	2	0	2	1	4					14
Trade Shows (6)	2	0	0	1	1	1	0	0					5
Consultant & Project Updates	3	2	2	5	5	4	4	4					29
Sites & Buildings Updated	✓	✓	✓	✓	✓	✓	✓	✓					0



Performance Matrix  
Job/Business Creation

August  
2024  
April

		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					6
	Primary Contact Meetings (12)	0	0	2	1	4	1	4	3					15
	Assist With Youth Biz Plan Comp. (1)	0	0	1	1	0	0	0	0					2
	NEXTworking (400 students)	Fall	Fall	Fall	Fall	Fall	Fall	Fall	Fall					0
	NEXTworking (70 businesses)	Fall	Fall	Fall	Fall	Fall	Fall	Fall	Fall					0
 Evelyn Reyes VP, Business Creation	Create 1 Biz Procurment Event	0	0	0	0	0	0	0	1					1
	Create 1 Biz Access to Capital Event	0	0	0	0	0	0	0						0
	1-on-1 With (20) Lenders	4	1	6	4	5	6	3	4					33
	1- on-1 With (20) Strategic Partners	2	3	7	6	7		4	10					39
	Silver Springs Shores Occupancy (50)	Not Open	Not Open	Not Open	June 19th	June 19th	33%	33%	33%					33%



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**OCALA METRO**  
CHAMBER & ECONOMIC  
PARTNERSHIP

## Performance Matrix Business Services

August  
2024



Tom James

Director of  
Executive  
Engagement

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Exec Partner Visits - 175	20	29	17	15	22	18	20	16					157
Exec Partner Events-10	x	x	2	x	1	1	1	1					6
Exec. Tier Introductions	8	\$8	\$10	\$5	\$5	\$10	\$8	\$8					\$62
Sponsorship Rev - \$260K	\$36,000	6500	10,700	29,600	7500	12,500	7,500	24,500					134800
CEP 101 200 Attendees	19	x	24	19	22	12	16	21					133



Andrea Bailey

Director of  
Business  
Services

Tuesday Talks 18 Attendees	24	15	31	10	50	50	26	21					28
Friday Talks 18 Attendees	54	20	17	22	30	15	23	25					26
LOM 30 Participants	30	30	30	30	30	X	37	37					32
LOMY 33 Participants	33	33	35	35	38	38	38	38					36
EM Breakfast 380 Attendees	436	285	308	351	395	302	303	338					340



Jess Schultz

VP of Partner  
Engagement

Partner Events (10)	8	12	14	9	8	9	6	10					76
Partner Meetings (15)	26	22	20	19	15	12	20	26					160
Business After Hours (400))	482	350	330	460	340	380	350	350					3042
Bview Events AM+PM (500)	2500	500	370	380	263	302	400	320					5035
Other Events (100)	120	95	103	145	183	92	150	120					1008



**OCALA METRO**  
CHAMBER & ECONOMIC  
PARTNERSHIP

## Performance Matrix Business Services

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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					52
BCEP Cold Calls	300	30	180	175	77	53	40	35					890
BCEP New Partner Meetings	9	13	6	6	15	10	12	8					79
BCEP Sponsorship	\$6,000	\$800	7600	\$1,600	\$0	3000	\$0	1800					\$20,800
BCEP Partner Upgrades	0	0	0	1 (\$1900)	0	0	0	0					0
Partner Touches	98	111	104	108	90	82	77	81					751
Retained Partners	8	13	10	10	11	13	8	7					80
Partner Upgrades	4	2	2	2	2	1	0	1					14
Value of Upgrades	\$ 37,500	\$5,000	\$45,000	\$7,500	\$3,700	\$2,500.00	\$0.00	\$2,500.00					\$ 103,700
Partner Events	26	25	24	22	38	57	38	80					310



Jim Pazda




Director of  
Business  
Services



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		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					401
	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					179
	Relocation Packets two Week (80)	7	10	9	9	7	6	8	4					60
	Renewal Packets (720)	76	63	44	81	101	43	90	66					564
	Touchpoint Postcards (1,000)	79	116	56	98	73	91	90	67					670
 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					49
	Verify that all bills recorded in the accounting software	√	√	√	√	√	√	√	√					√
	Record credit card charges (Weekly Basis) (50)	5	5	4	4	4	4	6	8					40
	Operational Meetings (50)	4	4	5	10	6	2	5	4					40



Jessica Gilbert

VP Foundation  
for CEP

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Grant Funding Secured (G:\$100k)	0	0	N/A	-	-	10,000	-	0					10,000
Submitted Grant Apps (Goal: 12)	1	0	N/A	1	2	2	2	1					8
Income (Goal: \$250k)	TBD	0	N/A	0	0	0	0	0					-
Foundation Visits (Goal:36)	3	0	N/A	1	2	2	5	5					18
Podcast Downloads (Goal: 800)	79	0	N/A	29	27	28	32	29					224



Sullivan Hogan

Director of Video  
Communications

Weekly Buzz Views (Goal: 32,000)	2885	3158	2806	4566	5560	4159	5358	6617					35,109
CEP on the Scene Views (Goal: 10,000)	480	690	644	N/A	4793	1849	773	1463					10,692
POV Views (Goal: 20,000)	1440	1594	1470	3074	2845	4090	2568	1874					18,955
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					995
Additional Internal Videos (Goal: 20)	1	2	0	1	2	1	2	0					9



Kelly McAtee

Director of  
Social Media &  
Marketing

FB New Follows (Goal: 1,200)	155	141	125	154	127	121	107	79					1,009
Facebook Posts Reach (Goal: 425,000 )	55,166	102,602	61719	62335	52839	53,878	62595	21734					472,868
LinkedIn Posts Reach (Goal: 80,000)	10,500	8300	9500	6500	13600	10,500	8923	7123					74,946
Email Opens (Goal:150,000)	26,698	26046	21534	14867	12114	18469	19591	24895					164,214
Website Reach (Goal: 95,000)	10,217	22885	9095	5600	5284	8557	7895	8432					77,965



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