



Director of
Business

News from the
Capitol
and
Citizens
Encouraging
Progress, Inc.
(CEPI) Updates

Business Advocacy

Inter-City Visit > The Quest-Savannah: Registration closing Friday, March 29th. Draft itinerary completed. Emails created for distribution leading up to event. Pre-event trip planned 4/8-4/11 to tour venues and meet with speakers.

Attended (6) Government Meetings or Workshops: (3/5 Impact Fee & 3/19) County Commissioners, (3/5) County Workshop (3/5) City Council, (3/6) Mayor Townhall, (3/27) Joint Public Meeting Public School Facility Planning and School Concurrency Work.

Host Quarterly Workshops / Roundtables on Business Issues: None for March

Attend Florida Chamber Events: (3/4, 3/11, 3/18, 3/25) Advocacy Committee Weekly Call

Local Issue Updates

Final legislative newsletter with governor bills passed sent Friday, March 29 at 3PM. The newsletter is in partnership with Old Florida Partners.

Attended workshop with city, county, and schoolboard to review plans for (2) new schools, maintenance on several schools, and road construction to accomodate Ocala's growth. This is an annual meeting where all (3) groups come together to discuss how they can collaberate with each other.

Legislative
Notes:

Attended 2 Florida Association of Chamber Professionals (FACP) Meetings: (2/23) Call, (2/29) In Person Meeting Lake City

Attended Association of Chamber of Commerce Executives (ACCE): (3/28) Roundtable Government Relations Division



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

The Job Creation team is discussing partnering with an existing logistics company. This partnership would enhance our attraction and retention efforts by highlighting a global logistical powerhouse that is headquartered in Ocala.

We celebrated E-ONE's 50th Anniversary. E-ONE is an important employer to Ocala, not only for the jobs and opportunities created for our residents, but also as a marketing asset to highlight Ocala's advanced manufacturing base and attract other manufacturers.

Project Rocky is moving closer to a site decision. This project would involve more than \$100 MM in capital investment and 350+ new jobs. Facilitating a call to introduce the company to Marion County staff and discuss project details.

Project Rusty closed on a site for their third manufacturing facility in Ocala. This expansion will create 50+ new jobs and result in \$4+ million in capital investment.

Our team is creating new marketing materials highlighting life sciences, manufacturing, logistics, and aviation as targeted industries.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

2024 Healthcare Council Q1 Meeting; Large discussion around assets and workforce pipeline. Continuing to expand the relationships in the cross sectors for partnership and growth.

2024 Healthcare Insider; sponsored by Ameris Bank, kicked off its Q1 networking event with over 50 healthcare partners in attendance

Sphere Life Science Slide Deck and Quick guide are completed and ready for use in our attraction and retention efforts for the Ocala Metro as we head into our first conferences in April.

BioFlorida Governemtn Affairs Committee Recaps adding great value to the council and our legislative planning for Q3 meeting.

Sphere Life Science Flex Space; proposal sent and next meeting in the works.



Bryce
Morrison

Director of
Business

Business Development

LLH had 1,697 webvisits.

We submitted 2 RFI's this month. Project Chips is a food manufacture seeking a new location of 40,000SF. Project No-Name is ax extremely large aerospace project seeking 60-200 acres.

We did not attend any trade shows this month. The team is getting ready for FEDC next month.

Met with Gray Construction and took them on a Fam tour of the Ocala Industrial market. Submitted our application for Duke Energys Infrastructure Grant to further development at Baseline Commerce Park.

Updated Sites & Buildings as necessary.



Evelyn
Reyes

VP, Business
Creation

Business Creation &
Hispanic Engagement

Establishing new CDFI process guide for NANO loan applicants.

First meeting with PROSPERA USA to start partnership on providing Spanish educational sessions.

I was a presenter during the Fast Trac educational workshop, focusing on guiding participants through the process of crafting a Capability Statement.

I met with the City of Ocala to coordinate efforts on developing a Procurement event in the City Of Ocala.

Guided PPBI Residents on creating their first capability statement.



Dean
Blinkhorn

COO/Director Of
Talent

NEXTworks
(Talent Development)

Construction Academy Meetings: None scheduled in March.

Primary Contact Meetings: Coffee with Jennifer Fryns from CF on 3/1, Zoom meeting with Cory Weaver from CareerSource on 3/29

Assist With Shark Tank Event: Judged the first round of applicants on March 7.

NEXTworking: In the fall.

Notes:

Student Media Festival judging, two nights of Capstone Projects at Belleview High, meeting with officials at Marion Corrections for recruiting marketing assistance



Jessica
Michel
Director of
Business
Creation

Power Plant Incubator

Total Occupancy at the PPBI - 78%. 14 Residents currently at Incubator. March we Graduated Areii.IO Capability statments were worked on with residents this month

Community Outreach: Attended the Supplier Diversity Exchange in Gainesville.

Content Creation: Healthcare Deck created, Manufacturing Banner Created. Working on four-pager for PPBI. EIR Topics updated on Flyers for the year.

Programming: Halfway through our FastTrac program. We have 7 students.

Total Jobs Created at the PPBI: 700 Total Graudate in 2024 - 2



Cherrietta
Prince
Director of
Impact

Impact Initiative

Conducted the annual review of the Ocala Metro FastTrac facilitator training program and learned of programmatic updates. As FastTrac program director, provided the Kauffman FastTrac report to the Business Creation team.

Attended the City of Ocala Mayor and leadership team Town Hall meeting to receive updates of city planning as it affects the business community.

Addressed a group of college students studying Entrepreneurship looking to explore opportunities in business.

Attended Ice House Entrepreneurship training (ELI Program) "Cultivating the Entrepreneurial Mindset," in preparation to become certified as a facilitator with ELI.

Surveyed entrepreneurs who attended IMPACT Construction Initiative training for feedback about the session and topics of interest for future training.



Tyler
LeCompte
Director of
Entrepreneurship
Services

2nd Stage Businesses

Technical Assistance - Assisted Ten (10) Entrepreneurs with Technical Assistance Appts

CDFI - New CDFI Certification Rules Release, FUND Group review - Approved, Certification Pending

2024 BC Programs - FastTrac Programs scheduled (all), EIR Series Under development, Ice House Certification pending

2nd Stage Programs - EiR Series 2024 - 2nd EIR meeting completed startup space Platform Launch Jan2024 - 64 users currently

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



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): E-One, Pat Myers Electric, Swamp Dog, Foster Bachschmidt, HCA, Geo-Tech, Heart of Florida Health Center, Ameris Bank, VyStar, Sherman Mechanical, Advanced Welding, Duke Energy, Engel & Volkers, Gaekwad, The Guest House, ACME, Zinnia.

Executive Partner Events (10/yr): Executive Roundtable Lunch was March 14th with 48 in attendance. CEO Network Reception was March 27th with 52 in attendance. The Spring Biannual Chairman's Lunch is scheduled for May 22nd.

Executive Tier Introductions: Ameris Bank/HCA, Sherman Mechanical/HCA, Wiley Productions/Stentiford Construction, Wilmek Construction/Pat Myers Electric, Dunkin/Ameris Bank, Estella Byrd Whitman/Charles McIntosh, Sevilla Law/Canon Solutions America, H2 Advisors/Wiley Productions, Encompass Health/Wiley Productions, Tasha Osbourne/Wiley Productions.

Sponsorships (\$260K/yr): Executive Roundtable Lunch (Q2): Seanote Construction... CEO Network Reception (Q2): Pixelemm... Business Roundtable & Connections Series: VyStar Credit Union... EM (Dec): Heart of Florida Health Center... Catalytic Conversations: The Guest House..

CEP 101s (200 attend./yr): ...was held March 6th & March 27th with 24 Partners total on hand.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > March 5 - Wesley Wilcox - Marion County Supervisor of Elections (31 CEP partners)

Friday Talks > March 29 - Jeff Leffel with Coin SEO (17 CEP partners)

Leadership Ocala Marion (LOM) > LOM Agriculture Session (30 students)

Leadership Ocala Marion Youth (LOMY) > March 4 - Public Safety with MCSO and OPD (35 students)

exCEPtional Mornings > March 20 - Ocala Downtown update with Main Street (308 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

OCEP Partner Events (10/mo): 13 ribbon cutting events

Business After Hours (400/month): 330 attendees at Business After Hours WEC

Other CEP Events (150/mo): approximately 103 attendees at partner events MBA, President's Luncheon, Networks Meetups

BCEP BAH/BotR (300/mo): BotR 120 attendees, BBAH 250 attendees

BCEP Other events (5/mo): 1 ribbon cutting



Chris
Blakenship
Partner Relations
Associate

Partner Sales

New Partner Sales: 12 @ \$7200

Cold Calls: 152

New Partner Meetings: 36

End of First Year Renewals: 9

Partner Upgrades: 0



Ron Hipner
Partner Relations
Associate

Partner Sales

New Partner Sales: 2

Cold Calls: 0

New Partner Meetings: 2

End of First Year Renewals:



Matt
Wilkerson
Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 24 in-person visits

Partner Calls (30/mo): 36 in-depth calls

Partner Videos (8/mo): 19 videos and getting more popular



Joe Reichel

Director of
Bellevue CEP

Belleview CEP Office

BCEP New Partners: 7

BCEP Cold Calls: 180

BCEP New Partner Meetings: 6

BCEP Sponsorship: \$7600

BCEP Partner Upgrades: 0



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 104 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 10 partners retained from 60-90+ days past due

Partner Upgrades & Value: WEC - Ocala Leadership --> Champion \$10,000 RoMac Building Supply, Inc. Business-->Champion \$10,000
R+L Global Logistics Champion-->Founder's Club \$35,000 Adjusted 6 Chairman-->Founder's
Club Tier: Optimum Dealership Group, Marion County Board of County Commissioners, HCA Florida Ocala Hospital, Cone
Distributing, Inc., City of Ocala, AdventHealth Ocala

Partner Events (Scheduling & posting): 25



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Initiative Meeting, presented by Pyranha, was held at the Equine Performance and Innovative Center with refreshments provided by All Dry Services. We enjoyed tours and equipment demos for horses and people with over 80 partners present!

Equine 101 & 201: Equine Rehab 101

Farm/Venue/School Visit: Cranchill Farm Dressage and Jumbolair Air and Equestrian Facility

Equine Events: Downtown Plaques Ribbon Cutting, Live Oak International and Longines League of Nations

Equine Industry Promotion: Wrote the equine newsletter, wrote the equine story for Ocala Magazine and organized horses to be downtown for the Bronze Plaques ceremony to promote the equine industry's claims to fame.



Kimberly
Langley

Executive
Assistant

Finance & Administration

Past Due Outreach - 37

Verify All New Partners Billing: March 2024

Pull Renewal Report - March 2024

Pay All Open Invoices Weekly -March 2024



Donna
Marseco

Director of First
Impressions

Operations

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



Amie Marsh

Director of
Finance &
Operations

Finance & Operations

Ensure we have receipts/support for all credit card charges (Weekly Basis) (50)

Resolve Partner Billing Discrepancies (Weekly Basis) (50)

Verify that all bills recorded in the accounting software have an invoice/support (Weekly Basis) (50)

Record credit card charges (Weekly Basis) (50)

Operational Meetings, Meet with Dean 4 times, Meet with Ops crew once



Natalie McComb,
CFRE

VP Foundation
for CEP

Foundation

No grant funding received in the month of January.

Received decline from Kroger Grant application. Continued follow up to Citizen's First Bank for CDFI funding. Completed written proposal for \$100k anonymous gift to Equine Education Program.

Ended 2023 with total Foundation income of \$298,204. Total income for the month of December was \$42,791 which included \$20k grant from Duke Energy.

Met with Rusty Branson about South State supporting the new CDFI, Phoebe Howard with FL Ortho Institute, had a great visit with regional leadership from TD Bank and TD Charitable Foundation about past grant support to steward for a future larger ask.

The Catalyst had 79 downloads/views between all channels including YouTube. January gusts included Charisse Rivers & Jeremiah Blocker.



Sullivan
Hogan

Director of Video

Communications

Weekly Buzz Views: There were 2806 for episodes 254 - 258 exceeding our stretch goal average of around 2650 views per month.

CEP on the Scene Views: There were 644 views for episode 38, with great reception and feedback from the featured partner JB Golf Carts.

POV Ocala Views: There were 1470 views for episodes 52 & 53, sitting just under our stretch goal average of about 1650 views per months

Irregular Series Views (Closer Look, Leading): There was one episode of A Closer Look this month with 995, notably nearly 700 of which came from Instagram

Additional Internal Videos: N/A



Kelly McAtee

Director of Social
Media &
Marketing

Communications

New Facebook Followers: 125 new monthly followers | 12,522 total followers

FACEBOOK Post Reach: 61,719 | **Engagement:** 11,743 | Top posts were (Ribbon Cuttings: J. McLaughlin-3340, Business and Beyond-1798, Fastest Labs-1589, Walk of Champions-1202, Media Minds-2168, R&L Carriers-2302, Vazul Hair Artistry-1588, MC Elementary Schools-2123, Ellianos Coffee-7517, Rob Main Health-1304, **E-one Anniversary-33,802**), Podcast 13 (1281), Friday Talks (1287), Tuesday Talks (1321), EM Flyer (1747), EM Photos (1833), BAH Flyer (1938), BAH Photos (3678), Weekly Buzz (ep 254 - 257- 3615), CEP On The Scene (1046), POV (518), A closer Look (416), MBA DR Horton (2757), Annual Lunch post event (5633), Conexion Hispana (518), Heart of HR (578), YPO Events (1600) Marion County Hiring (1908) Equine Impact (2861), Bricks & Mortar Real Estate Fundraiser (2233) Belleview- BOTR (2674)

FACEBOOK Group Reach: 8,037 | **INSTAGRAM Reach:** 1612 (CEP), 863 (ODM), 84 (Equine), 44 (BelleviewCEP)

Email Blast Open Rate: Number of people opening email blasts are at an increase of 21,534

CEP Website Visits: 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 9,095

LinkedIn Followers & Post Impressions: 9,500 impressions with 65 new followers. LinkedIn views continue to increase due to more frequent posts and our video series. Starting in 2024, LinkedIn stats will be shared with Bryce and Bart.



Dawn
Bowman

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2024 FB 22,446 and IG 2,798 : Jan FB 22,855 +409 , IG 2,949 + 151, Feb FB 23,849= +994 IG 3,109 = +311, March 24,346= +497 IG 3183= +74,

Market Vendors (336/mo): Jan 332, Feb 376, March 462

36 Pavillion Rentals for the year: Jan 6, Feb 4, March 4

12 Self-generated ODM events:Jan 0, Feb 1, March 1,

Provide 2 Vendor Workshops a Year:



N/A

TBD