



Kelli Holt

Business Advocacy

Inter-City Visit > The Quest-Savannah: Organizing Ocala Thing Tank Committee, as a post event measure to discuss and implement ideas in Ocala. First meeting will be scheduled mid to late August.

Attended (4) Government Meetings or Workshops: (6/4, 6/18/24) City Council, (6/4, 6/18/24) County Commissioners

Host Quarterly Workshops / Roundtables on Business Issues: None held in June.

Local & Legislative

Community Updates and Citizens Encouraging Progress, Inc. (CEPI) Updates

Attended local meetings: (6/17/24) met with Commissioner Michelle Stone, (6/25/24) Florida Public Relations Association, FPRA, met to discuss upcoming board role as Vice President of Communications, (6/25/24) MCBIA luncheon.



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Project Timeout closed on their property in Ocala. This project brings AYR Wellness to the Ocala Metro and will result in \$43 MM in capital investment and 350 new jobs.

I connected the Dollar Tree Distribution Center leadership team to the University of Florida's Wedgeworth Leadership Institute to coordinate a site visit in July. This group contains business leaders from across Florida and will highlight our reputation as a logistics hub for the Southeast US.

Project Rocky is moving closer to a site decision. This project would involve more than \$100 MM in capital investment and 350+ new jobs. Hoping to have a closing date soon.

The level of industrial activity is at an all-time high. There is a steady stream of leads, calls, and projects moving throughout the Job Creation team, with a few huge announcements on the way soon.

I attended the SelectUSA Investment Summit in Washington, DC. This event brings together EDO's from across the US and makes connections with international businesses that are interested in the US investment. We made dozens of connections and look forward to furthering those conversations into potential investment in the Ocala Metro.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Held the Healthcare Council Q2 Meeting with 36 Key healthcare leaders and educators.

Attended the FIME Conference to connect with Global Life Science Companies looking at US and FL sites.

2 New Lifescience RFI's Submitted for potential projects as activity and interest in the market continues.

Meetings with Old Florida Partners to host a legislative overview with new policy/budget for the HC Council in August.

Sphere Life Science Flex Space; working on structural rendering and collaboration with local company.



Bryce
Morrison

Director of
Business

Business Development

LLH had 1,593 webvisits.

We submitted 2 RFI's this month. Project Witam and Project Wygledy, both are in the life sciences industry.

I attended the C2ER conference and received professional development training in data sources and analytics.

Intro meeting with ARCO discussing opportunities in Ocala. Attended LEAD investor event, toured Christopher C Ford Commerce park with the broker. Several follow-ups with the SSI Program and Baseline Water study

Updated Sites & Buildings as necessary.



Evelyn
Reyes

VP, Business
Creation

Business Creation &
Hispanic Engagement

Grand Opening of the IMPACT Incubator in Silver Springs Shores

Attended the OFN Natianl Conference in Chicago. Related to getting certified as a CDFI

Met with several financial software companies, to be considered as the Ocala Catalyst Fund new platform.

Focuss on starting a new branding campaign of all that is done at the PPBI and with the IMPACT Initiative, to increase awarness and participation.

Attended the City of Ocala Procurment event.



Dean
Blinkhorn
COO/Director Of
Talent

Networks
(Talent Development)

Construction Academy Meetings: Scheduled meeting was cancelled.

Primary Contact Meetings: Lunch with Chris Carlisle with MCPS on 6/19.

Assist Youth Business Plan Competition: Event was on April 4.

NEXTworking: In the fall.

Notes:

Met with the CareerSource consultants on 6/18, lunch with Chris Carlisle with MCPS, phone meeting with CF's Vintage Farm consultant



Jessica
Michel
Director of
Business
Creation

Power Plant Incubator

PPBI Occupancy: 85%. 5 New Incubator Partners (The Birthday Club, Comeau Software Solutions, Spotless Gutter Cleaning, Mr Sketcher and Mr Scribes, & Florida SBDC).

Community Outreach: Celebrated Grand Opening Incubator on June 19th

Content Creation: Completed two tableclothes for IMPACT Incubator and Power Plant.

Programming: 1MC Ocala averages 46 attendees this month. Weekly Power Hour with PPBI Partner

Total Jobs Created at the PPBI: 700 Total Graduate in 2024 - 4



Cherrietta
Prince
Director of
IMPACT

Impact Initiative

Celebrated Grand Opening of the new IMPACT Incubator in Silver Springs Shores with the Business Creation Team and invited partners.

Attended City of Ocala "Meet & Greet" to learn more about Procurement opportunities with the City at the Mary Sue Rich Center to assist entrepreneurs with City contracts.

Delivered an overview of the Business Creation and the IMPACT Initiative to CEP networking groups for VetWorks and The Power Networkers.

Communicated with new partners, welcoming them to the CEP and informed each about programs and opportunities at the Power Plant and through the Business Creation team.

Assisted Resident entrepreneurs at the Power Plant with developing their Executive Summaries for the Business Plan.



Freddie
Morris
Director of
Entrepreneurship
Services

2nd Stage Businesses

Grand Opening event for IMPACT Incubator in Silver Springs Shores, June 19th.

Business Creation Content Creation: Power Plant Incubator Instagram has increased its visibility by over 1000%

Attended 1 Million Cups Eustis and tour the Mega Works Space Facility

Stared gathering information on resources for Ocala business owners. To share with business owners we service on a daily basis.

Started content creation for Business Creation Team Initiatives



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Encompass Health, Seacoast Bank, Pinnacle Retirement Advisors, Wire3, Gallagher, Brookdale Chambrel Pinecastle, Clymer Farner Barley, HCA Florida Ocala Hospital, R+L Global, All Dry Services, Geo-Tech, Citizens First Bank, Haven Home Health, Boyd Real Estate, WCJB TV20, Seanote Construction, Bank of America, WEC.

Executive Partner Events (10/yr): The 2Q Executive Roundtable Lunch was held June 11th, with 70 CEP Partners in attendance.

Executive Tier Introductions: Ausley Construction/Estella Byrd Whitman, Bank of America/Encompass Health, UF Health/R+L Global, Pro Realty/Seacoast Bank, Sevilla Law/Bank of America, R+L/Liquid Creative, SouthState Bank/Haven Home Health, Clymer Farner Barley/Marion County, Citizens First Bank/All Dry, Cullison Wright/HCA Florida Ocala Hospital.

Sponsorships (\$260K/yr): Clymer Farner Barley (POV:Ocala)... Pat Myers Electric (Hobby Horse Equestrian Games Parade)...

CEP 101s (200 attend./yr): We had 12 on hand.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > June 4 - Ethics in the Workplace - Bill Ross, Hands Up Communcations (50 CEP partners)

Friday Talks > June 28 - Cost Optimization with Phylis Cauthen, Achooley Mitchell (15 CEP partners)

Leadership Ocala Marion (LOM) > Planning Session and applications open until July 16th

Leadership Ocala Marion Youth (LOMY) > LOMY Interviews for next Class - 72 Application, 71 Interviews and 38 Accepted

exCEPtional Mornings > June 19th - Space Florida with Robert Long, President & CEO (302 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

OCEP Partner Events (10/mo): 8 ribbon cutting events

Business After Hours (400/month): 380 attendees at Business After Hours Mainstreet

Other CEP Events (150/mo): approximately 85 attendees at partner events MBA, President's Luncheon, CEP 201, Networks Meetings

BCEP BAH/BotR (300/mo): BotR 92 attendees, BBAH 210 attendees

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



Chris
Blakenship
Partner Relations
Associate

Partner Sales

New Partner Sales: 17 @ \$12,100

Cold Calls: 155

New Partner Meetings: 29

End of First Year Renewals: 9

Partner Upgrades: 1



Ron Hipner
Partner Relations
Associate

Partner Sales

New Partner Sales: 1

Cold Calls: 0

New Partner Meetings: 2

End of First Year Renewals:



Matt
Wilkerson
Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 21 in-person visits

Partner Calls (30/mo): 41 in-depth calls

Partner Videos (8/mo): 24 videos. Partners very receptive to these videos. Started the introduction request videos for partners.



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners: 7

BCEP Cold Calls: 53

BCEP New Partner Meetings: 10

BCEP Sponsorship: \$3000

BCEP Partner Upgrades: none



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 82 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 13 partners retained from 60-90+ days past due

Partner Upgrades & Value: Estella Byrd Whitman Community Health Center: Business-->Legacy = \$2,500

Partner Events (Scheduling & posting): 57



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Initiative Meeting, presented by Pyranha, was held at the Ocala Breeders Sales with 47 partners present for a walking tour and racehorse 101 with Nial Brennan of Niall Brennan Stables and Ali and Brandon Rice of RiceHorse Stables, learning about buying, selling, training and conformation.

Equine 101 & 201: Racehorse 101 sales and training

Farm/Venue/School Visit: Ocala Downtown Market for Summer Reading and Horses Program

Equine Events: Royal Ascot

Equine Industry Promotion: Wrote the equine newsletter and wrote the Everything Equine section for Ocala Magazine..



Kimberly
Langley

Executive
Assistant

Finance & Administration

Past Due Outreach - 71

Verify All New Partners Billing: June 2024

Pull Renewal Report - June 2024

Pay All Open Invoices Weekly - June 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



Jessica Gilbert
VP Foundation
for CEP

Foundation

Grant Funding: 10k (TD Bank)

Applications pending: PNC/BOA/Duke

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.

The Catalyst had 28 downloads/views between all channels including YouTube. May guests included Rondo Fernandez and Dawn Westgate.



Sullivan
Hogan
Director of Video

Communications

Weekly Buzz Views: There were 4159 for episodes 268 - 271 over doubled our stretch goal average of around 2650 views per month.

CEP on the Scene Views: There 1849 views for CEP on the Scene this month. Viewership for the series continues to sky rocket despite only one episode being posted a month.

POV Ocala Views: There were 4090 views for episodes 57 & a 58, sitting well over double our stretch goal average of about 1650 views per months

Irregular Series Views (Closer Look, Leading): N/A

Additional Internal Videos: One video invite



Kelly McAtee
Director of Social
Media &
Marketing

Communications

New Facebook Followers: 121 new monthly followers | 12,840 total followers

FACEBOOK Post Reach: 53,878 | **Engagement:** 14,205 | Top posts were **Ribbon Cuttings:** Wolfy's-30,557, Flyers Cafe-3698, Guns N' Gold-1018, House of Shooogie-2457, Gentle Carousel Reading-2468, Agua Pools-2512, UF Health-4143, Magnolia Homes-1658, First American Title-1481, Silver Springs Shores Incubator-1775), Friday Talks (1830), Tuesday Talks (2174), EM Flyer (1533), EM Photos (1712), BAH Flyer (1769), BAH Photos (2971), Weekly Buzz (ep 266 - 270 - 1325), CEP On The Scene (861), POV (1113), Marion County Hiring (3482) Belleview- BO'TR/BBAH (979), ODM Sunday (1846)

FACEBOOK Group Reach: 10,019 | **INSTAGRAM Reach:** 1772 (CEP), 953 (ODM), 61 (Equine), 56 (BelleviewCEP)

Email Blast Open Rate: Number of people opening email blasts are at an increase of 18,469

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

LinkedIn Followers & Post Impressions: 10,500 impressions with 81 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, April 24,816 =+470, IG 3,296=+113 May 24,914 =+98, IG 3,355=+59, June 25,030=+116, IG 3401=+46

Market Vendors (336/mo): Jan 332, Feb 376, March 462, April 408, May 417, June 402,

36 Pavillion Rentals for the year: Jan 6, Feb 4, March 4, April 5, May 4, June 4,

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

Provide 2 Vendor Workshops a Year:



N/A

TBD