



Erin Jones

VP, Economic
Development

Healthcare Development

Project Acivity continues forward. Project Chrome local expansion project underway, Project Affirmed moving forward with anticipated occupancy in September.

Attended the Select Florida International Delegation meeting in Orlando, with the International business consultants who look at international companies interest in Florida

Hosted Bio Florida Representatives in market to secure a regional event to take place at WEC in May

Hosted the Insite Real Estate group and the Lee & Associates Brokers team in from Chicago who attended the Annual Luncheon as well.

Meeting with key brokers, site selectors and project leads on current projects and pipeline. We completed 1 RFI to the state.



**Open
Position**

Director of
Business
Development

Business Development

LLH had 138 Visit this month. Numbers pulled 12/18/25 , plus historically low in December.

We had

I did not attend any trade shows this month.

Several consultant updates related to various on-going projects.

Updated Sites & Buildings as necessary.



Jessica Michel

Director of Incubators

Power Plant Incubator

Professional Development: Took GIS Training for sites and buildings database

Business Networking: Attended CEP Annual Luncheon. Did Power Hour with Partners at Power Networkers on Feb 26th.

Community Outreach Speaking Engagements: Talked about PPBI at Power Networkers

PPBI & IMPACT Incubator: 2 Businesses Started Incubation Period in February (SCADADOG & New Light Consulting) Aman Tax and Accounting services has started nesting Period with incubation start date of March. 1 Office available at PPBI from cleaning out storage room, 2 offices available at Impact Business Incubator

Social Media - Grew in following on all three platforms with constant visitors on PPBI Website. From 2691 to 2664 between new followers and site visits on the PPBI Website



Freddie Morris

Director of Entrepreneurship Services

2nd Stage Businesses

Professional Development: 1) Started Online Certification on Coursera for Business Development

Business Networking: Attended the OcalaCEP Annual Luncheon | Finalized the 4 Sponsors for the YBPC

Business Educational Sessions: Attended Forest High School's Career Fair to spread the word about the Youth Business Plan Competition

Gave a presentation at North Marion High School for their Career Fair

Attended the Entrepreneurship Club meeting at the College of Central Florida. Secured their assistance in the YBPC



Norman Velasquez Alvarez

Director of IMPACT

Impact Initiative

Professional Development: I attended the Tuesday Talks: Let's plan to attend to learn more about the 5c's of credit. of CEP Ocala.

Business Networking: 1) I attended the Annual Lunch - 2026 of the CEP Ocala. 2) I attended the Business After Hours of the CEP Ocala. 3) I attended the Business After Hours of the CEP Belleview.

Business Educational Sessions: 1) I facilitated the "Capsulas de Negocios" Dedicated to helping construction business with procurement. 2) I facilitated the "Hablemos de Negocios" in person. Dedicated to helping hispanic business owners to develop their business.

Training agenda and speakers for the "Hablemos De Negocios"- Fast Trac and Impact Procurement Academy initiatives were structured for the year 2026.

I supported in the assembly and operation of the Ocala CEP Annual Lunc.



Beth McCall

Director Of
Advocacy &
Talent
Development



Reyes

VP, Business
Creation

Talent Development & Advocacy

Business Creation

Government Meetings or Workshops: 2/10 - Legislative reception in Tallahassee / 2/11 - Marion County Days

Host Quarterly Workshops / Round tables on Business Issues / Meet One-on-One with school and business leaders: 2/13 - High School principal's quarterly meeting /

Construction Academy Meetings: 2/12 at MCBIA

Classrooms to Careers: 2/2 - Zoom with Donnie Jones of West Alabama Chamber re WOW / 2/4 - Met with Imhabibi Laroche of Cardinal Glass / 2/12 - Met with Sarah Russell of Advent / 2/19 - attended Xello conference / 2/23 - Met with Alice Avery of E-1 / 2/24 - Phone meeting with Jennifer Ervns of CE

NEXTworking (Students):

NEXTworking (Industry):

Created "Hablemos De Negocios , 2026 Annual Funders investment packages.

Service 25 Mide Town Business Owners: 2 Business consultations-UBS Staffing & Synalgic Studios

Represented CEP at the Trade Mision Puerto Rico in Orlando. With a delegation of over 25 business owners from Puerto Rico.



Tom James

Director of
Executive
Engagement

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Zinnia Wealth Management, Cogent Bank, Radiant Credit Union, Patriot Path Solutions, H2 Advisors, Florida Credit Union, Benmar Construction, Bailey Building, City of Ocala, North Central Florida Media Group, WEC, WCJB-TV, The Boyd Group, Straight Line Construction, Stentiford Construction, TPX Communications, Roam Electric, Seacoast Bank, Pixelemm, Nyra Consulting, Miller & Sons Plumbing, Kimley Horne, GWC Medical Group, Fundelivered, FTBOA, Empath, Citizens First Bank, Ameris Bank, Cox Business, Duke Energy, Seacoast Bank, Horse Farms Forever, Progress Marion, Cone Distributing, HDG Hotels.

Executive Partner Events (10/yr): CEO Network Reception - Feb. 10th. Next Executive Roundtable Lunch - March 24th. Next Biannual Chairman's Lunch - May 27th.

Executive Tier Introductions: Cox Business/Seacoast Bank, Mayor Ben Marciano/Jumbolair, Patriot Path Solutions/Stentiford Construction, Patriot Path Solutions/Roam Electric, Patriot Path Solutions/Pixelemm.

Sponsorships (\$260K/yr): Paddock Mall (June BAH), Bowlero East (July BAH), Bridlewood Farm (CEP Equine Coloring Book), Progress Marion (CEP Annual Luncheon), Patriot Path Solutions (CEO Network Reception), Patriot Path Solutions (Executive Roundtable)

Extra Partner Engagements: EM, BAH, Matt Private Reception: Approximately 180



Andrea Bailey

Director of
Business Services

Leadership & Education

Tuesday Talks > February 3: SBA Advice with Cogent Bank (29 CEP partners)

Friday Talks > February 13: How Imagery shapres your brand with Jenny E Photography (32 CEP partners)

Leadership Ocala Marion (LOM) > January 13: Healthcare Session with Advent, HCA, SMA, Heart of Florida and Estella Byrd Whitman (36 students)

Leadership Ocala Marion Youth (LOMY) > February 2: Arts Session with Appleton, Reilly and OCT (36 students) February 23: Ag Day at Southeastern Youth Fair (36 students)

exCEptional Mornings > February 18: MCPS updatye with Dr. Danielle Brewer (340 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 8 ribbon cutting/groundbreaking events

Partner Meetings: 21 meetings - 6 Business, 4 premium , 2 Legacy, 2 Leadership, 1 Champion, 1 Chairman's, 4 Founder's Club

Engagement Events (150 attendees/mo): approximately 133 attendees at events - at Conexion Hispana, CEP Power Network, YBL, BBL, Networks, and Stiletto Networks meetings

BCEP BAH/BotR (300/mo): Belleview events BotR Feb 24 @ 100 and BBAH Feb 26 @ 200

Outreach Activity (100/mo): Apprx 58 outreach calls - prospecitve, new, and established partner check-ins;



Chris Blakenship

Director of Partner Relations

Partner Sales

New Partner Sales: 17 @ \$53,900 (9 Bus, 5 Prem, 1 Leg, 1 Lead, 1 Founder)

Cold Calls: 130 (22 to recently dropped partners)

New Partner Meetings: 30 (15 in person)

End of First Year Renewals: 10 @ \$11,600 (5 Bus, 3 Prem, 2 Leg)

Partner Upgrades:

TBD

Partner Sales

New Partner Sales:

Cold Calls:

New Partner Meetings:

End of First Year Renewals:



Matt Wilkerson

Director of Partner Success

Partner Engagement

Partner Visits (10/mo): 17 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 32 in-depth calls---taking a different approach moving forward from month 4 on.

Partner Videos (8/mo): 8 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list. **Some have requested a second video. STOR MOR has taken our meeting to heart and is now very engaged on social media with videos and advertisements. GREAT to see.**



Diane Thomason

Partner Relations Associate

Partner Sales

New Partner Sales: (3) Planet Smoothie Ocala (Business) Bojangles (Business) Raising Canes Ocala (Business) = **\$1,800**

Cold Calls: (12) 3 phone calls to prospects and 9 in person introductions to set up future meeting(s)

New Partner Meetings:(9) Follow-ups to provide prospect packet to discuss benefits & ROI, walk through applications/onboarding

End of First Year Renewals: N/A (none have come up on renewal yet)



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): Four New Partners, Two Business and two Premium Partners. One upgrade from Business to Leadership! - New \$3600. and Upgrade \$4200.00

BCEP Cold Calls: 146- Six times canvassing and sharing invitations to our events(BotR, BBAH). Also specific outreach to share information about Beautify Bellevue.

BCEP Partner Meetings: 7 meetings with prospective partners and 15 meetings/visits with partners.

BCEP Sponsorship: \$750 - Feb BotR

BCEP Other Engagement: One Ribbon Cutting and one ground breaking, attended BNI Profit Makers, Homless Council meeting, Canvassing for Beautify Bellevue, Bellevue on the Rise, Bellevue Business After Hours, attended exCEPTIONAL Mornings, Ocala After Hours, Bellevue Business Leaders, Bellevue Ambassador meeting, presented BCEP update at Bellevue City Commission, Attended County Commission, PRAC meeting, attended Friday Foodie Fest.



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 166 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 8 partners retained from 45+ days past due

Partner Upgrades/ Value: **Meldon Law** Business->Leadership=\$5000, **BB Graphics & The WrapPros** Business->Leadership=\$5000, **Harmony Business Solutions** Business--> Premium=\$1200, **Biznct** Business-->Premium=\$1200

Partner Events (Scheduling & posting): 46



**Louisa
Barton**

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Meeting, presented by Pyranha, was held at HITS Post Time Farm with refreshments and a HITS 101 and tours by JB Golf Carts

Equine 101 & 201: HITS 101

Farm/Venue/School Visit: Cypress Valley Ag and Equine Programs Farm for homeschoolers

Equine Events and Community Meetings: Children's Charity Classic Competition at HITS

Equine Industry Promotion: Wrote the equine newsletter about the upcoming Children's Charity Classic, wrote the Everything Equine section for Ocala Magazine about the Great Florida Cattle Drive..



Open Position

Chief of Staff &
Executive
Assistant

Finance & Administration



**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
Resolve Partner Billing Discrepancies
Verify that all bills recorded in the accounting software have an invoice/support
Record & reconcile credit card charges
Print monthly renewal letters and invoices to be sent out the first of every month



Jessica Gilbert

VP Foundation
for CEP

Foundation

Grant Funding: Submitting for TD and Wells

Grant Cycle opens in March

2026 Foundation: \$10,000 to date

Voluntary Donations: \$1700

CEP First Friday with Audacy - Renewing for 2026



Noah Paradiso

Visual Media
Specialist

Communications

Weekly Buzz Views: There were 6,632 views for the Weekly Buzz this month well exceeding our stretch goal average of around 2650 views per month, with episodes breaking over 1K views on multiple platforms.

CEP on the Scene Views: Paused

POV Ocala Views: Paused - Scheduled to return in 2026

Irregular Series Views (Closer Look, Leading):

Additional Internal Videos: 4 additional videos were produced for Annual Lunch along side 1 additional instagram reel.



**Arin
Conrad**

Director of
Communications &
Marketing

Communications

Campaigns/Projects: CEP Annual Lunch; Transition Binder with Responsibilities & Notes; Updated Equine Webpage; Met with Jamie Tardif to update Belleview CEP website

FACEBOOK Top posts: Advent Heathbrooke ER RC-30.3k, 7 Brew RC-25.1K, Kona Ice RC-18.1K, Love INC RC-12.9K, Jan BAH Photos-12.2K, Stretch Zone RC-11.1K, Pure Bath RC-10.5K, View Outdoor RC-7.9k | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach. Our top performing posts by VIEWS is consistly ribbon cuttings and event photos.

Press Releases: n/a | **Media Contact:** Submitted article for Ocala Downtown Newspaper

Linked In Posts: Need to work on plan for consistent intentional posting on this platform. Posted the new founders club partner, Brije Homes + Marketing & Communications Specialist Job Opening Graphic.

Social media data is now tracked within a dedicated tab on the performance matrix, allowing all metrics to be collected, analyzed, and monitored in one centralized location.

CEP Website Visits: Sessions: 9,812 | Average Session: 00:03:55 | **Overview:** Website traffic has increased compared to previous months, driven by event registrations, partner event submissions to the calendar, and additional registration link clicks shared.



**Dawn
Bowman**

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2026 FB 27,451 and IG 5,487: Jan FB +239=27,690, IG+ 98=5,585, Feb FB

Market Vendors (336/mo): Jan 514

36 Pavillion Rentals for the year: Jan 3

12 Self-generated ODM events:Jan 0,

Provide 2 Vendor Workshops a Year:



**Open
Position**