



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Attended the BIO Florida NE Chapter event in Jacksonville at the Mayo Clinic, touring there new expansion project. Connecting with Life Science companies.

Participated in a market visit with the Florida Blue Corporate team, presenting the state of the region to there team at the college of central florida.

Hosted Q3 Council meeting with a Legislative Panel for the CEP Heatlhcare council with Senator Stan McClain, Rep. Judson Sapp and Rep. Ryan Chamberlain. Overwiewing the current legislative healthcare intiatives and opening the floor to the council to hear needs for 2026 Sessions. With 48 attendees.

Hosted, Duke, Senior Economic Dev. Cor. Alex Sanchez for a business development meeting, updates and project activity opportunities.

Project activity continues to move forward for the fall.



Bryce Morrison

Director of
Business
Development

Business Development

LLH had 930 Visit this month.

We submitted 3 RFI's this month. Project Fast, Project Mars, and Project Trivio 1.

I did not attend any trade shows this month.

Our LinkedIn presence and impressions are growing due to our increased targeted marketed efforts. Several posts focused on our target industries.

Updated Sites & Buildings as necessary.



Beth McCall

Director Of
Advocacy &
Talent
Development

Talent Development & Advocacy

Government Meetings or Workshops: August 19, County Commission Meeting /

Host Quarterly Workshops / Round tables on Business Issues / Meet One-on-One with school and business leaders: August 6, Meeting with Jason Jacobs, principal at Lake Weir High School / August 13, Meeting with Jason Jacobs, principal of Lake Weir High School, and Denise Alexander, Executive Director of MCBIA /

Construction Academy Meetings: August 14 / MCBIA Construction Academy Committee meeting /

NEXTworking (Students):

NEXTworking (Industry): August 19, Meeting with Douglas Cone III and Mel Rappleyea to discuss NEXTworking event / August 25, Meeting about NEXTworking event at WEC with Lisa Labo, WEC Director of Catering, Conference Services and Events / Meeting with Lt Paul Bloom of MCSO about NEXTworking

NOTE:



**Evelyn
Reyes**

VP, Business
Creation

Business Creation

Attended the Black & Hispanic Summit In Tampa.

Attended the SBDC Conference in Tampa

Attended the CEP Executive Luncheon

Attended Puerto Rican Chamber Of Central FL. Forum in Kissimmee FL.

Secured Hispanic Heritage Month Sponsor



**Jessica
Michel**

Director of
Business Creation

Power Plant Incubator

Power Plant Business Incubator Occupancy: 95% and IMPACT Business Incubator Occupancy: 83%. We Welcome H.E.R.O Mental Health into PPBI in suite 109. 2 offices available at IMPACT & 1 office available in PPBI

Community Outreach: Presented to GNO Networking Group about the PPBI Resources and Services on August 19th

Content Creation: Updated OMCF Pledge Card and Invite. Created Donation Form for OMCF. Updated Construction Academy Flyers for the end of the year.

Website: Business Consulting Landing Page is live for PPBI. Working on Revamping website with new look. From January to August, our total audience on social media grew by 15%, from 1,873 to 2,155, underscoring consistent brand visibility and community engagement across channels.

Programming: Separated our Power Hour meetings into two meetings between IMPACT and PPBI with both meeting the 1st Thursday of each month. Finished up some Partner 1 on 1.



**Freddie
Morris**

Director of
Entrepreneurship
Services

2nd Stage Businesses

Began our second cohort of the Ice House Entrepreneurship Mindset Course

Attended SBDC Small Business Summit in Tampa Florida

Organized and Conducted our Black Business Month Workshop at the Mary Sue Rich Center with over 60 registered and in attendance

Community outreach efforts, met with numerous Black Business Owners around the city to let them know of our FREE Resources

Conducted the Entrepreneur in Residence Series and had over 40 registered and in attendance



**Norman
Velasquez
Alvarez**

Director of
IMPACT
Entrepreneur

Impact Initiative

Four (4) FastTRAC sessions during the month of August 2025, with 20 entrepreneurs and business owners registered to date. At the Mary Sue Rich Community Center.

Attended and assisted with Traveling 1MC, which took place at the Belleview Community Center

Attended SBDC Small Business Summit in Tampa Florida

Attended and assisted with the Black Business Month Workshop in the Mary Sue Rich Center

Conducted "Hablemos De Negocios" where we had over 30 business owners registered and in attendance



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Advanced Welding, SouthState Bank, Angie Lewis State Farm, Benmar Construction, Colomb Investment Management, Bailey Building, Douglas Law Firm, N. Central Florida Media Group, Gallagher, WEC, Pixelemm, Hilton Hotel, Seacoast Bank, Wilmek Construction, City of Ocala, TV20, Pro Realty of Ocala, Roam Electric, CPPI, Grandview Clydesdales.

Executive Partner Events (10/yr): Executive Roundtable Lunch was held at The Reilly's Black Box on August 27th, with 54 CEP "Executive Tier" Partners on hand.

Executive Tier Introductions: Clymer Farner Barley/Wawa, CPPI/Advanced Welding, Grandview Clydesdales/Colomb Investment Management, Bailey Bldg & Construction/Douglas Law Firm, Advanced Welding/Wilmek, Hilton/Colomb Investment Management, Hilton/SouthState Bank, Hilton/Seacoast Bank, Bailey Bldg & Construction/Gallagher.

Sponsorships (\$260K/yr): Pat Myers Electric (Horse Capital Parade Presenting Sponsor), Angie Lewis State Farm (2 NextWorking events), Smash Wraps (Jumbolair Equine Event), Wilmek Construction (Horse Capital Parade).

CEP 101s (200 attend./yr): 15 attendees



Andrea Bailey

Director of
Business Services

Leadership & Education

Tuesday Talks > August 5: Matt Leibfried with City of Ocala (22 CEP partners)

Friday Talks > August 29: Gary Wise - Wise Leadership (CEP partners)

Leadership Ocala Marion (LOM) > August - Application Deadline August 5 - Interviews on August 8 - Accepted 37 students. August 28: Orientation and DISC profiles

Leadership Ocala Marion Youth (LOMY) > August 25: LOMY Parent Student Orientation

exCEptional Mornings > August 20: Dr. Jim Henningsen, President, CF (317 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

CEP Ribbon Cuttings/Groundbreakings (10/mo): 9 ribbon cutting/groundbreaking events

Partner Meetings: 19 meetings - 6 Business, 2 premium , 6 Legacy, 3 Leadership, 2 Founders

Engagement Events (150 attendees/mo): approximately 190 attendees at events; 70 at Conexion Hispana, CEP Power Network, YBL, BBL, Vetworks, and Stiletto Networks meetings, and President's Luncheon PLUS a Happiest Hour w/Roam Elec

BCEP BAH/BotR (300/mo): Belleview events BotR Aug 26th @ and BBAH Aug 28th @ 270

Outreach Activity (100/mo): Apprx 73 outreach calls - prospective, new, and established partner check-ins;



**Chris
Blakenship**
Partner Relations
Associate

Partner Sales

New Partner Sales: 19 @ \$25,900 (4 Ent, 8 Bus, 2Prem, 3 Leg, 2 Lead)

Cold Calls: 129 (10 to recently dropped partners)

New Partner Meetings: 30 (16 in person)

End of First Year Renewals: 13 @ \$12,600 (1 Ent, 8 Bus, 1 Prem, 3 Leg)

Partner Upgrades: 0



Ron Hipner
Partner Relations
Associate

Partner Sales

New Partner Sales: 1

Cold Calls: 2

New Partner Meetings: 2

End of First Year Renewals: 3



**Matt
Wilkerson**
Director of Partner
Success

Partner Engagement

Partner Visits (10/mo): 13 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 33 in-depth calls

Partner Videos (8/mo): 9 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. Discussing a different approach moving forward for better response from partners.**



Diane Thomason
Partner Relations
Associate

Partner Sales

New Partner Sales: 1 @ \$5,000

Cold Calls: 4

New Partner Meetings: 1

End of First Year Renewals: 0



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners (report revenue then tiers): \$2,400. (FOUR Business Partners!)

BCEP Cold Calls: 198 - Six times canvassing and sharing invitations to events (Congressman Fine Meet&Greet, BotR, BBAH) -canvassing with ambassadors!! (And sharing invites at Foodie Fest) Also specific outreach for Beautify Bellevue to share information.

BCEP Partner Meetings: 7 meetings with prospective partners and 18 meetings/visits with partners.

BCEP Sponsorship: \$1350.

BCEP Other Engagement: CEO Network Recept, BackpackDrive w/GreggSmithAuto, CanvassingBeautify Bellevue and events, BellevueFoodieFest, PRACmeeting, exCEptional Mornings, OcalaAfterHours, BellevueBusinessAfterHours host Roam Electric& Wilmek(170), BellevueontheRise-Chair Kathy Bryant-StateoftheCounty(75), Bellevue BusinessLeaders(12), BellevueAmbassador meeting, Attended County Commission meeting, attended a Bellevue City Commission meeting, Met with Congressman Fines staff, Attended Congressman Fine Meet&Greet, attended four ribbon cuttings, attended two 1 Million Cups (1 in Bellevue!), led President's Luncheon!



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 101 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 20 partners retained from 30+ days past due

Partner Upgrades & Value: None = \$0.00

Partner Events (Scheduling & posting): 52



Louisa Barton

Director of Equine
Engagement

Equine Engagement

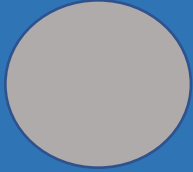
Equine Initiative Meeting: The Equine Meeting was held at in the CEP Boardroom with a demo and 101 in natural horsemanship with Dancin Pete Rodda from Complementary Horsemanship dnd refreshments by Royal Blessing Rescue .

Equine 101 & 201: Horsemanship 101 and 201

Farm/Venue/School Visit: Reddick Elementary and Camp Wildwood for Equestrian Girl Scouts

Equine Events and Community Meetings: Florida Horse Park Board Meeting

Equine Industry Promotion: Wrote the equine enewsletter and wrote the Everything Equine section for Ocala Magazine about the 2025 successes and wins and the legacy of Bridlewood Farm .



Open Position

Chief of Staff &
Executive
Assistant

Finance & Administration



Donna

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

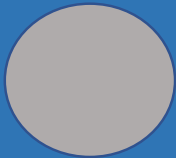
Foundation

Grant Funding: Duke ED Grant \$11,0000 - PNC Grant \$10,000

2 grant applications submitted

Ended 2024 with total Foundation income of \$298,204.

CEP First Friday with Audacy - August 1st with Justin Morton - Sonic --- Renee Gunther (Sept)



OPEN POSITION

Visual Media

Communications

Weekly Buzz Views: There were 3,646 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: There were 1770 views for POV Ocala this month

Irregular Series Views (Closer Look, Leading): HDG Founder's Club Video

Additional Internal Videos:



Arin

Director of
Communications &
Marketing

Communications

New Facebook Followers: 141 new monthly followers | 14,281 total followers.

FACEBOOK Post Reach: 46.6k | **Engagement:** 3k | **Top posts:** Magnolia Soap RC-20.6k, Mortgages with Brittany RC-14.1K, COTY Finalist Photos-13.4K, Optimize U RC-13.2K, DZ Corp RC-9K, AdventHealth Primary Care RC-8.4K, Central City Realtyb RC-8.2K, July BAH Photos-6.4k | **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.

FACEBOOK Group Reach: 8,027 | **INSTAGRAM Reach:** 24k (CEP), 31.1k (ODM), 22 (Equine), 551 (BellevueCEP)

Email Blast Open Rate: Open Rate: 46% | Overview: Over the past few months, we have reduced the volume of emails sent, resulting in a 6% increase in our open rate. This demonstrates that our emails are now more targeted and purposeful, with recipients engaging with them before deleting.

CEP Website Visits: Sessions: 6,906 | **Average Session:** 00:04:17 | **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.

LinkedIn Followers & Post Impressions: 8,330 organic impressions with 47 new followers at **3,580** total. LinkedIn views continue to increase due to more frequent posts and our video series. LinkedIn stats are shared with Bryce.



**Dawn
Bowman**

Director
Ocala Downtown
Market

Ocala Downtown Market

Increase Social Media Followers (333/mo): Starting 2025 FB 25,781 and IG 4,158 : Jan FB 25,942 +161 , IG 4,309+ 151, Feb FB 26,056 = 275+ IG 4,415 = 106+, March FB 26,197=141+ IG 4,579 = 164+, April FB 26,253 =+56, IG 4,745 =+166 May 26,457 =204+, IG =+, June 26,553=96+, IG 5,027 = 282+, July 26,656=103+,IG 5,104 =77+ , Aug 26,775=119+ IG5,255 =151+, Nov IG Dec IG

Market Vendors (336/mo): Jan 350, Feb 408 , March 521 , April 402, May 498 , June 370, July 392, Aug 523, Sept ,Oct , Nov , Dec

36 Pavillion Rentals for the year: Jan 3, Feb 5, March 3, April 7 , May 6 , June 6, July 10, Aug.12, Sept , Oct , Nov , Dec

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

Provide 2 Vendor Workshops a Year:



N/A

TBD

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Population (millions)	7.7	7.9	8.1	8.3	8.5	8.7	8.9	9.1	9.3	9.5	9.7	9.9	10.1	10.3	10.5	10.7	10.9	11.1	11.3	11.5	11.7
GDP (trillion USD)	44.2	48.1	52.0	55.9	59.8	63.7	67.6	71.5	75.4	79.3	83.2	87.1	91.0	94.9	98.8	102.7	106.6	110.5	114.4	118.3	122.2
Per capita GDP (USD)	5,728	6,090	6,433	6,731	7,035	7,333	7,631	7,929	8,227	8,525	8,823	9,121	9,419	9,717	10,015	10,313	10,611	10,909	11,207	11,505	11,803
Life expectancy (years)	74.7	75.5	76.3	77.1	77.9	78.7	79.5	80.3	81.1	81.9	82.7	83.5	84.3	85.1	85.9	86.7	87.5	88.3	89.1	89.9	90.7
Urban population (%)	55.0	56.0	57.0	58.0	59.0	60.0	61.0	62.0	63.0	64.0	65.0	66.0	67.0	68.0	69.0	70.0	71.0	72.0	73.0	74.0	75.0
Renewable energy (%)	1.0	1.5	2.0	2.5	3.0	3.5	4.0	4.5	5.0	5.5	6.0	6.5	7.0	7.5	8.0	8.5	9.0	9.5	10.0	10.5	11.0
CO2 emissions (Gt)	15.0	15.5	16.0	16.5	17.0	17.5	18.0	18.5	19.0	19.5	20.0	20.5	21.0	21.5	22.0	22.5	23.0	23.5	24.0	24.5	25.0
Forest cover (%)	21.0	21.5	22.0	22.5	23.0	23.5	24.0	24.5	25.0	25.5	26.0	26.5	27.0	27.5	28.0	28.5	29.0	29.5	30.0	30.5	31.0
Healthcare expenditure (USD/billion)	10.0	11.0	12.0	13.0	14.0	15.0	16.0	17.0	18.0	19.0	20.0	21.0	22.0	23.0	24.0	25.0	26.0	27.0	28.0	29.0	30.0
Education expenditure (USD/billion)	5.0	5.5	6.0	6.5	7.0	7.5	8.0	8.5	9.0	9.5	10.0	10.5	11.0	11.5	12.0	12.5	13.0	13.5	14.0	14.5	15.0
Research and development (USD/billion)	2.0	2.5	3.0	3.5	4.0	4.5	5.0	5.5	6.0	6.5	7.0	7.5	8.0	8.5	9.0	9.5	10.0	10.5	11.0	11.5	12.0
Government debt (trillion USD)	10.0	11.0	12.0	13.0	14.0	15.0	16.0	17.0	18.0	19.0	20.0	21.0	22.0	23.0	24.0	25.0	26.0	27.0	28.0	29.0	30.0
Unemployment rate (%)	5.0	5.5	6.0	6.5	7.0	7.5	8.0	8.5	9.0	9.5	10.0	10.5	11.0	11.5	12.0	12.5	13.0	13.5	14.0	14.5	15.0
Income inequality (Gini index)	35.0	35.5	36.0	36.5	37.0	37.5	38.0	38.5	39.0	39.5	40.0	40.5	41.0	41.5	42.0	42.5	43.0	43.5	44.0	44.5	45.0
Gender inequality (GII)	0.75	0.76	0.77	0.78	0.79	0.80	0.81	0.82	0.83	0.84	0.85	0.86	0.87	0.88	0.89	0.90	0.91	0.92	0.93	0.94	0.95
Human Development Index (HDI)	0.70	0.72	0.74	0.76	0.78	0.80	0.82	0.84	0.86	0.88	0.90	0.92	0.94	0.96	0.98	1.00	1.02	1.04	1.06	1.08	1.10
