



Kelli Holt

Director of
Business
Advocacy

Business Advocacy

Inter-City Visit > Established a task force to incorporate and apply the successful strategies we observed in Savannah into our own practices in Ocala. First meeting will be held on September 19th for 10am-11am in the CEP Boardroom.

Attended (5) Government Meetings or Workshops: (7/2, 7/16) City Council, (7/2, 7/16) County Commissioners, (8/14) Attended City Vendor Fair at Mary Sue Rich Center.

Host Quarterly Workshops / Roundtables on Business Issues: Coordinating fall round table with Jessica McClain at Old Florida Partners. Speakers to include Representative Stan McClain, Alec Yarger, the Legislative Affairs Director for the Department of Revenue and potentially Madeleine Thakur with the Children's Movement. The topic of focus will be to educate partners on the new Childcare Tax Credit.

Procurement Training: Scheduled partner procurement training with the city and county vendor liaisons on September 13th, 17 registered partners attending as of August 28th.

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

Local & Legislative

Attended local meetings: (8/16) Florida Public Relations Association (FPRA), (8/30) attending gala at Appleton Museum to be inducted to the board as the 2025 Vice President of Communications.

Ribbon Cuttings: Ribbon Cutting Photography for (8/21) Anytime Fitness, (8/23) Harrell Youth Center, and (8/28) Free Up Storage



Bart Rowland,
MEDP

VP of Job
Creation

Job Creation

Project Flower applied for a Special Use Permit with Marion County. The Planning & Zoning Commission unanimously approved the application. The SUP Permit now goes to MCBCC for final approval on 9.17.24. This highly competitive advanced manufacturing project will result in hundreds of new jobs and millions in capital investment.

Our team is facilitating a meeting with the Sunny Oaks developers and Duke Energy. This site has been identified as prime for industrial development by Duke Energy.

The Job Creation Team hosted VisionFirst Advisors to discuss our marketing strategy. We visited several industrial sites and met with a few large employers to discuss the community.

Project Bananas Foster continues to move closer the end zone. Several hurdles to cross before this huge project is considered complete. It is encouraging to see local stakeholders working together to make this project a success.

Our team met with InSite Real Estate and Lee & Associates Tampa Bay to discuss marketing their 115 acres near the Ocala International Airport. We have already submitted the site for several industrial projects and look forward to seeing new growth at this prime location.



Erin Jones

Director of
Healthcare
Development

Healthcare Development

Project Virgo continues to look for expansion location in the Ocala Metro. Working with them on available sites.

Water/Sewer Study completed. Purpose to assist in projection for needs to expand infrastructure with potential projects

Healthcare Council 3rd Quarter meeting complete. Jessica McClain of Old Florida Partners, gave a full legislative overview for our the council specific to healthcare and life science.

Working with Bio Quebec president and Select Florida's Quebec office, on collaboration for in market visit in September.

NEXTworking Healthcare session in September, received 30 healthcare volunteers.



Bryce
Morrison

Director of
Business
Development

Business Development

LLH had 1,766 webvisits.

We submitted 4 RFI's this month. Project Feather (AdvManf), Project Thor (Aerospace), Project GreenPack (AdvManf), and Project PowerCell (AdvManf)

I did not attend any conferences or tradeshow this month.

Concluded the Baseline Water Study. Scheduled meetings between Duke and Property Owners for site development. Economic Development Marketing day with VisionFirst. Marketing Ocala Airport with Insite.

Updated Sites & Buildings as necessary.



Evelyn
Reyes

VP, Business
Creation

Business Creation &
Hispanic Engagement

Completed the Loan process for the Ocala Catalyst Fund.

Attended the NAWBO- Networking for good event in Orlando, Fl.

Attended the CEO Networking Reception- eXceptional Mornings- CEP business after hours- CEP President's Lunch.

Restructured what business educational workshops will be executed before end of year.

Scheduled the Launch of " Hablemos De Negcios" Sept. 12, 2024. Thereafter once a month.



Dean
Blinkhorn
COO/Director Of
Talent

NEXTworks
(Talent Development)

Construction Academy Meeting: August 8.

Primary Contact Meetings: Lunch with Meghan Magamoll from PEFMC on 8/14, coffee with Jennifer Fryns from CF on 8/28, and lunch with Gary Smallridge from MTC on 8/27.

Assist Youth Business Plan Competition: Event is planned.

NEXTworking: In the fall.

Notes:

Attended the Heart of Florida cookout on 8/9, a call with Natalie Wenzler of the Indiana Chamber on 8/8 to discuss skills-based hiring, a Plan Of Work meeting with Heather on 8/16, the United Way annual luncheon on 8/22, my first board meeting for the Public Education Foundation on 8/27, the CEP Executive Roundtble Luncheon on 8/28, and several priliminary NEXTworking planning meetings.



Jessica
Michel
Director of
Business
Creation

Power Plant Incubator

PPBI Occupancy: 80%. SCORE & SBDC office weekly. Started a co-working office with 6 desks. 3 office spaces available (110, 109, 107). Comaeu Software solutions has left PPBI.

Created graphic design for PPBI events & promoted at: 1MC Ocala: Hispanic Heritage Month Celebration. Black Business Month Spotlight at EM Breakfast

Content Creation: Finalized Branding for IMPACT. Created promo material for IMPACT. Finalizing Partner Canvas for PPBI. Finalized Window Decals for IMPACT Business Incubator

Programming: 1MC Ocala averages 56 attendees this month. Weekly Power Hour with PPBI Partners. We started weekly Partner Presentations for Power Hour..

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



Director of
Entrepreneurship
Services

2nd Stage Businesses

Added Incubator Partners to Planting Power Business Directory (Startup Space) and set the requirements needed in order to be added to it

Business Creation Content Creation: Power Plant Incubator Instagram has increased its reach by 28% and impressions over 164%

Conducted SCORE Business Essentials (3 total sessions in August)

Attended SBDC Small Business Conference August 19 & 20.

Created 2024 Black Business Month Spotlight Video



Tom James

Director of
Executive

Sponsorship & Executive Tier

Executive Partner Visits (175/yr): Wire3, Cogent Bank, Champion Manufacturing, Campus USA, OTOW, DeLuca Toyota, Pro Realty, First Federal Bank, MIDFlorida Credit Union, Reveille Wealth Management, AdventHealth, HCA Florida Ocala Hospital, Encompass Health, College Of Central Florida, City of Ocala, Grandview Clydesdales.

Executive Partner Events (10/yr): The 3Q Executive Roundtable Lunch was held August 28, with 59 CEP Partners in attendance.

Executive Tier Introductions: Wire3/On Top Of The World, Wire3/Lennar, AdventHealth, Pro Realty, Alivia/AdventHealth, Alivia/North Central Florida Media Group, Reveille Wealth Management/Geo-Tech, Wilmek Construction/HFF.

Sponsorships (\$260K/yr): HCA Florida Ocala Hospital (EM Series Sponsor renewal)... Engel & Volkers (Hobby Horse Equ Games - Real Estate Sponsor)... Ian Robb BEMER (Hobby Horse/Equ Expo Equine Tech Sponsor)... Ad-Vance Talent Solutions (Equine Expo Presenting Sponsor)... Florida Blue (Fast Fwd sponsor Dec,Jan,Feb)...

CEP 101s (200 attend./yr): We had 21 on hand.



Andrea Bailey

Director of
Business

Leadership & Education

Tuesday Talks > August 6 - Understanding Trauma - Stephen and Joy Zedler, The Peral Project (21 CEP partners)

Friday Talks > August 30 - NAMI - Mental Health resources (25 CEP partners)

Leadership Ocala Marion (LOM) > Orientation: August 9 at OMCAR. SIMSOC: August 12 at CF and Ropes: August 17 at Elks in Umatilla (37 partners)

Leadership Ocala Marion Youth (LOMY) > Student and Parent Orientation: August 19. SIMSOC: August 24 at CF (38 students)

exCEptional Mornings > August 21: Dr. Gullett and Nancy Thrower with MCPS (338 CEP Partners)



Jess Schultz

VP, Partner
Engagement

Partnership Sales and
Engagement

OCEP Partner Events (10/mo): 9 ribbon cutting events

Business After Hours (400/month): 350 attendees at Business After Hours UF Health

Other CEP Events (150/mo): approximately 120 attendees at partner events MBA, President's Luncheon, CEP 201, Networks Meetings

BCEP BAH/BotR (300/mo): BotR 105 attendees, BBAH 215 attendees

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



Chris
Blakenship
Partner Relations
Associate

Partner Sales

New Partner Sales: 18 @ \$15,600

Cold Calls: 152

New Partner Meetings: 28

End of First Year Renewals: 13 @ \$12,800

Partner Upgrades: 1 @ \$1900



Ron Hipner
Partner Relations
Associate

Partner Sales

New Partner Sales: 0

Cold Calls: 2

New Partner Meetings: 1

End of First Year Renewals:



Matt
Wilkerson
Director of
Partner Success

Partner Engagement

Partner Visits (10/mo): 29 in-person visits (multiple " pop-ins " to introduce myself)

Partner Calls (30/mo): 39 in-depth calls

Partner Videos (8/mo): 26 videos. Partners very receptive to these videos. Started the short introduction request videos for partners. Encouraged them to create a TOP 5 list.



Joe Reichel

Director of
Bellevue CEP

Bellevue CEP Office

BCEP New Partners: 4

BCEP Cold Calls: 35

BCEP New Partner Meetings: 8

BCEP Sponsorship: \$1800.00

BCEP Partner Upgrades: none



Jim Pazda

Director of Partner
Services

Partner Services

Partner Touches: 81 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

Retained Partners: 7 partners retained from 60-90+ days past due

Partner Upgrades & Value: Bridgewater Park: Business-->Legacy Trustee \$2500

Partner Events (Scheduling & posting): 80



Louisa Barton

Director of Equine
Engagement

Equine Engagement

Equine Initiative Meeting: The Equine Initiative Meeting, presented by Pyranha, was held at the CEP Boardroom for Horse Behavior 101 Part 2 with Pete Rodda with refreshments by Benmar Construction with 46 partners present.

Equine 101 & 201: Horse Behavior 101

Farm/Venue/School Visit: Kyle Dewar's Farm - Chestnut Hill and Adena Club

Equine Events and Community Meetings: Equine Performance Innovative Center EPIC Dog Days Event

Equine Industry Promotion: Wrote the equine newsletter and wrote the Everything Equine section for Ocala Magazine. Also communicated with the USDA Veterinarian to work on promotion of international equine quarantine



Kimberly
Langley

Executive
Assistant

Finance & Administration

Past Due Outreach - 56

Verify All New Partners Billing: August 2024

Pull Renewal Report - August 2024

Pay All Open Invoices Weekly - August 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/Duke/Papa Johns

Ended 2023 with total Foundation income of \$298,204.

The Catalyst had 32 downloads/views between all channels including YouTube. New episodes to premiere in August: Rondo Fernandez/Dawn Westage - September: Levonda Goodson



Sullivan
Hogan
Director of Video

Communications

Weekly Buzz Views: There were 6617 for episodes 276 - 278 over doubled our stretch goal average of around 2650 views per month, with episode 278 on Smalls Sliders notable reaching over 2.7K views and the repost of episode 276 reaching 1.3K.

CEP on the Scene Views: There 1463 views for CEP on the Scene this month, breaking over 1.1K views on Facebook.

POV Ocala Views: There were 1874 views for episodes 60 & a 61, notably the most recent episode of POV was posted on the day these numbers were taken.

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

Additional Internal Videos: N/A



Kelly McAtee
Director of Social
Media &
Marketing

Communications

New Facebook Followers: 79 new monthly followers | 12,983 total followers

FACEBOOK Post Reach: 21,734 | **Engagement:** 6,023 | Top posts were **Ribbon Cuttings:** The Joint Chiropractic-2091, NASH Plumbing-747, Rustic Roots Salon-2356, Essentials Health-789, Wire3-1412, Team Select Home Care-765, Popeyes-2738, Anytime Fitness-1439, Boys & Girls Club-1542, Friday Talks (1601), Tuesday Talks (2104), EM Flyer (1022), EM Photos (2092), BAH Flyer (1375), BAH Photos (2090), Weekly Buzz (ep 275 -277 - 5037), CEP On The Scene (1548), POV (288), Belleview- BOTR/BBAH (1131), Equine Expo (2405), Podcast (269). Slightly lower post reach this month due to Summer and less RC events. Engagement still remains at average.

FACEBOOK Group Reach: 8,573 | **INSTAGRAM Reach:** 7731 (CEP), 1492 (ODM), 88 (Equine), 678 (BelleviewCEP)

Email Blast Open Rate: Number of people opening email blasts are at an increase of 24,895

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: 7,123 organic impressions with 52 new followers at 3,038 total. 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.



August
2024



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, July 25,171= +141 IG 3504=+103

Market Vendors (336/mo): Jan 332, Feb 376, March 462, April 408, May 417, June 402, July 341, Aug 462,

36 Pavillion Rentals for the year: Jan 6, Feb 4, March 4, April 5, May 4, June 4, July 3, Aug. 1,

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

Provide 2 Vendor Workshops a Year:



TBD

[illegible]