






Kelli Holt

Director of
Business
Advocacy

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Quest: 2024 Savannah	Planning in process	Planning in process	Planning in process	✓	✓	✓							✓
Attend 4+ Gov Workshop(s)	5	4	6	5	7	4							31
Hold 4+ Equine Advocacy Meetings	0	0	0	0	0	1							1
4+ Partner Workshops or Roundtables	0	0	0	0	0	0							0
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Notes:

	January	February	March	April	May	June	July	August	September	October	November	December	Total
 Bart Rowland, MEDP VP of Job Creation	Retention Visits (200)	15	15	15	12	15	16						88
	New Jobs Created (400)	48	0	50	0	0	0						98
	Capital Invest. (\$40MM)	\$3	0	4	16	3	43						\$69.0
	Primary Employer Events	0	1	0	0	0	0						1
	Corporate Visits (2)	0	0	0	0	0	0						0
 Erin Jones Director of Healthcare Development	HC Council/ NEXTworking (150)	65	0	38	0	0	36						139
	Comm. Touchpoint (120)	25	20	25	20	18	15						123
	HC Conf/ Trade Show(2-4)	1	1	0	3	0	1						6
	HC Exc. Tier Touch Base/Mtg.(15)	5	4	6	3	2	1						21
	Healthcare Insider (100)	0	0	55	0	31	0						86
 Bryce Morrison Director of Business	LLH Website Visits (20k)	1,315	1,789	1,697	1,625	1,576	1,593						9595
	RFI's (10/yr)	2	1	2	2	0	2						9
	Trade Shows (6)	2	0	0	1	1	1						5
	Consultant & Project Updates	3	2	2	5	5	4						21
	Sites & Buildings Updated	✓	✓	✓	✓	✓	✓						0



Dean Blinkhorn




COO/Director of
Talent
Development




	January	February	March	April	May	June	July	August	September	October	November	December	Total
Construction Academy meetings (12)	1	1	N/A	1	1	0							4
Primary Contact Meetings (12)	0	0	2	1	4	1							8
Assist With Youth Biz Plan Comp. (1)	0	0	1	1	0	0							2
NEXTworking (400 students)	Fall	Fall	Fall	Fall	Fall	Fall							0
NEXTworking (70 businesses)	Fall	Fall	Fall	Fall	Fall	Fall							0
Create 1 Biz Procurment Event	0	0	0	0	0	0							0
Create 1 Biz Access to Capital Event	0	0	0	0	0	0							0
1-on-1 With (20) Lenders	4	1	6	4	5	6							26
1- on-1 With (20) Strategic Partners	2	3	7	6	7								25
Silver Springs Shores Occupancy (50)	Not Open	Not Open	Not Open	June 19th	June 19th	Done							0



Evelyn
Reyes

VP, Business
Creation

	January	February	March	April	May	June	July	August	September	October	November	December	Total
 Freddie Morris Director of Entrepreneurship Services	Technical Assistance (100)	20	5	10	0	3	3						41
	Avg. 1MC Attendees (45)	55	60	55	55	56	56						337
	2023 BC Programs (4)	0	1	1	0	1	0						3
	2nd Stage Programs (15)	1	1	1	1	0	0						4
	GrowthBiz Prospects (12)	1	1	1	0	2	0						5
 Jessica Michel Director of Business Creation	PPBI Occupancy (min 50%)	86	86	78	78	83	83						494
	Community Outreach	10	2	2	1	3	2						20
	OP Produced Content 1x12	1	7	1	3	3	4						19
	Resident 1 on 1 (44)	5	2	2	1	2	2						14
	Graduate 3 companies	1	0	1	0	2	0						4
 Cherrietta Prince Director of IMPACT Initiative	Technical Assistance (105)	21	11	5	0	8	7						52
	FastTrac Courses (2)	0	1	0	0	0	0						1
	West Ocala Touches (35)	8	4	1	0	1	2						16
	Marion Oaks Touches (35)	7	1	0	0	3	2						13
	Silver Springs Shores Touches (35)	5	4	3	0	3	3						18

	January	February	March	April	May	June	July	August	September	October	November	December	Total
 Tom James Director of Executive Engagement	Exec Partner Visits - 175	20	29	17	15	22	18						121
	Exec Partner Events-10	x	x	2	x	1	1						4
	Exec. Tier Introductions	8	\$8	\$10	\$5	\$5	\$10						\$46
	Sponsorship Rev - \$260K	\$36,000	6500	10,700	29,600	7500	12,500						102800
	CEP 101 200 Attendees	19	x	24	19	22	12						96
 Andrea Bailey Director of Business Services	Tuesday Talks 18 Attendees	24	15	31	10	50	50						30
	Friday Talks 18 Attendees	54	20	17	22	30	15						26
	LOM 30 Participants	30	30	30	30	30	X						30
	LOMY 33 Participants	33	33	35	35	38	38						35
	EM Breakfast 380 Attendees	436	285	308	351	395	302						346
 Jess Schultz VP of Partner Engagement	Partner Events (10)	8	12	14	9	8	9						60
	Partner Meetings (15)	26	22	20	19	15	12						114
	Business After Hours (400))	482	350	330	460	340	380						2342
	Bview Events AM+PM (500)	2500	500	370	380	263	302						4315
	Other Events (100)	120	95	103	145	183	92						738



Joe Reichel




Director of
Bellevue CEP

	January	February	March	April	May	June	July	August	September	October	November	December	Total
BCEP New Partners	9	8	7	3	9	7							43
BCEP Cold Calls	300	30	180	175	77	53							815
BCEP New Partner Meetings	9	13	6	6	15	10							59
BCEP Sponsorship	\$6,000	\$800	7600	\$1,600	\$0	3000							\$19,000
BCEP Partner Upgrades	0	0	0	1 (\$1900)	0	0							0
Partner Touches	98	111	104	108	90	82							593
Retained Partners	8	13	10	10	11	13							65
Partner Upgrades	4	2	2	2	2	1							13
Value of Upgrades	\$ 37,500	\$5,000	\$45,000	\$7,500	\$3,700	\$2,500.00							\$ 101,200
Partner Events	26	25	24	22	38	57							192



Jim Pazda

Director of
Business
Services

	January	February	March	April	May	June	July	August	September	October	November	December	Total
 Kimberly Langley Executive Assistant	Past Due Outreach	39	38	37	46	50	71						281
	Verify Partner Billing	√	√	√	√	√	√						√
	Renewal Report	√	√	√	√	√	√						√
	Pay All Invoice	√	√	√	√	√	√						√
 Donna Marseco Director of First Impressions	Monthly Invoices & Statements	√	√	√	√	√	√						√
	New Partner Packets (250)	18	24	11	27	30	24						134
	Relocation Packets two Week (80)	7	10	9	9	7	6						48
	Renewal Packets (720)	76	63	44	81	101	43						408
	Touchpoint Postcards (1,000)	79	116	56	98	73	91						513
 Amie Marsh Director of Finance & Operations	Ensure we have receipts/support for all credit card charges	√	√	√	√	√	√						√
	Resolve Partner Billing Discrepancies (Weekly Basis) (50)	5	5	7	8	6	6						37
	Verify that all bills recorded in the accounting software	√	√	√	√	√	√						√
	Record credit card charges (Weekly Basis) (50)	5	5	4	4	4	4						26
	Operational Meetings (50)	4	4	5	10	6	2						31

