



TBD

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. 2025 Quest Trip will be to Huntsville, AL in the fall.

**Attended (4) Government Meetings or Workshops:** Two meetings attended in December

**Host Quarterly Workshops / Roundtables on Business Issues:** None for December

Local & Legislative

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

Marion County Legislative Delegation Luncheon presented by AT&T and hosted by College of Central Florida on Wednesday, January 8th.

Director of Advocacy position will remain open through the Spring of 2025



Bart Rowland,  
MEDP

VP of Job  
Creation

Job Creation

We facilitated meetings to discuss the Child Care Tax Credit program. This program will help local employers tackle the childcare shortages that their employees may be facing.

The next Inside Industry Ocala is being planned for mid-January. This networking event brings Ocala's manufacturing and logistics sectors together to share best practices and build new relationships. This event will be held at R+L Global Logistics and sponsored by Ameris Bank.

Project Liberty has been reactivated. This potential existing employer expansion would result in hundreds of new jobs and millions in capital investment. Very exciting opportunity.

Connected local employer with Project Flower. This connection could result in millions in revenue for the local employer and solve some logistical issues the company is experiencing across the country.

Our team is meeting with several local employers in preparation for two upcoming trade shows. Not only will we be meeting with businesses about benefits of relocating to the Ocala Metro, we will be making connections for existing Ocala employers.



Erin Jones

Director of  
Healthcare  
Development

Healthcare Development

Visited the Max Planck Neuro Institute and UF Scripps cluster in Jupiter Florida. Ocala Royal Dames is funding a glioblastoma research with UF Scripps facility. STEM and R&D ideas as well as foundation and partnership across the state were a result of the visit.

Hosted the Q4 CEP Healthcare Council meeting at College of Central Florida, where the council was treated to a behind the scenes first look at the new state of the art Nursing facility coming on line in early Q1. CFC Staff presented on upcoming new programs, funding and whats next for higher education in Ocala

Hosted the SVP of BioFlorida with the Council meeting and toured WEC for upcoming meeting opportunities for regional meetings in 2025 in Ocala. Bringing Life Science partners in market is key to growing the existing footprint.

CEP Life Science Flex Space discussions continue to expand with education and New developments lend to partnerships for the space.

Follow up with Canadian based Reproductive company looking at Animal life science sector, with key in market connection made.



Bryce  
Morrison

Director of  
Business  
Development

Business Development

LLH had 1,678 Visit this month.

Working with Duke Energy Economic Development team to strategize on marketing sites for 2025.

Finalized video marketing schedule for 2025.

Coordinating site visit for Project Snare with the company and Select Florida. Several discussions with Duke Energy surrounding infrastructure improvements and current sites.

Updated Sites & Buildings as necessary.



Evelyn  
Reyes

VP, Business  
Creation

Business Creation &  
Hispanic Engagement

Attended the CEP CEO Network Reception.

Completed and executed BC Teams yearly reviews.

BC Team has entered 77 business workshops into growth zone and rooms calendar

BC Team has created all fyers for next years business workshops.



Blinkhorn  
COO/Director Of  
Talent

Networks  
(Talent Development)

**Construction Academy Meeting:** none scheduled

**Primary Contact Meetings:** Lunch with Gary from MTC on 12/4.

**Assist Youth Business Plan Competition:** nothing scheduled.

**NEXTworking:** none scheduled.

**Other:** Belleview On The Rise on 12/3, lunch with Laurie Zink of IHMC on 12/5, part of the Golden Apple caravan on 12/11, PEFMC Board social after-hours on 12/11, IHMC Holiday after-hours party on 12/12, Business After Hours at Gulf Atlantic Bank on 12/19, and ongoing aPHR certification preparation.



Jessica  
Michel

Director of  
Business  
Creation

Power Plant Incubator

PPBI Occupancy: 85.7%. Moved co-working office with 6 desks to Downstairs office 114. 3 office spaces available (110, 107, 205). SCORE has dedicated office Space in 109. Market Ventures moving into additional Conference Space. Webway moved to office 200

Professional Development: InBIA's Entrepreneurship Center Management (ECM) Certificate Program - completed

Content Creation: Completed Slides for EM - Finalized Website Development for PPBI Website for another year. Created Power Point Presentation Slides for Hablemos.

Programming: Power Partner Exchange - Next one is Febuary 12th. Finalaizing Speaker Jorge with Silva Law

Total Jobs Created at the PPBI: 715 Total Graduate in 2024 - 4



Director of  
Entrepreneurship  
Services

2nd Stage Businesses

Finalized Application & Flyer for Youth Business Plan Competition

Secured EIR Speaker for 1st Quarter of 2025

Opened Applications for Youth Business Plan Competition and updated landing page for PPBI website

Secured Traveling 1 MC locations for Quarters 1 & 2 of 2025

Updated the Start Up Space Directory for our Incubator Partners



Tom James

Director of  
Executive

Sponsorship & Executive Tier

**Executive Partner Visits (175/yr):** First Federal Bank, SouthState Bank, Pounds Construction, Colomb Investment Management, PRP Aviation, Club Adena, Cogent Bank, Renasant Bank, Market Street at Heathbrook, PNC Bank, All Dry Services, HFHC, WEC, AdventHealth, HCA, Professional Realty, Wire3, Jumbolair, Sherman Mechanical.

**Executive Partner Events (10/yr):** CEO Network Reception was held December 3rd at the Hilton Garden Inn Downtown (61 attendees).

**Executive Tier Introductions:** First Federal Bank/Wilmek Construction, Pounds Construction/Cogent Bank, Club Adena/SouthState Bank, Club Adena/PRP Aviation, SouthState Bank/All Dry Services, SouthState Bank/PRP Aviation, Renasant Bank/Club Adena.

**Sponsorships (\$260K/yr):** Horse Farms Forever (2025 Annual Luncheon), Pixelemm (CEP 101), Duke Energy (2025 Annual Luncheon), Reveille (4 EMs in 2025), Reveille (Biannual Chairman's Lunch 2025), Florida Blue (3 Fast Forward Banner ads).

**CEP 101s (200 attend./yr):** Our combined November/December CEP 101 was on Dec. 4th --- 13 attendees.



Andrea Bailey

Director of  
Business

Leadership & Education

**Tuesday Talks >** December 3 - Jaye Baillie with MCA - State of the Arts in Marion County (7 CEP partners)

**Friday Talks >** December: CANCELLED per TD Bank

**Leadership Ocala Marion (LOM) >** December 13: Elected Officials Session - SOE, State and Local Elected Officials (36 partners)

**Leadership Ocala Marion Youth (LOMY) >** December 2: Local Government: Kathy Bryant, Amanda Tart, Ben Marciano, Chief Balken, Mock Commission Meeting (38 students)

**exCEPtional Mornings >** December 18: Florida Sports Foundation (246 CEP Partners)



Jess Schultz

VP, Partner  
Engagement

Partnership Sales and  
Engagement

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

**Business After Hours (400/month):** 350 attendees at Business After Hours Gulf Atlantic Bank

**Other CEP Events (150/mo):** approximately 22 attendees at events; President's Luncheon. No NetWorks or other misc events in December

**BCEP BAH/BotR (300/mo):** Belleview events BotR Dec 3rd @ 100 and BBAH 5th @ 150 for Holidays

**BCEP Other events (5/mo):** 1 RC BCEP



Chris  
Blakenship  
Partner Relations  
Associate

Partner Sales

**New Partner Sales:** 8 @ \$7000

**Cold Calls:** 90

**New Partner Meetings:** 15

**End of First Year Renewals:** 7 @ \$4500

**Partner Upgrades:** 1 @ \$1900



Ron Hipner  
Partner Relations  
Associate

Partner Sales

**New Partner Sales:** 1 @ 600

**Cold Calls:**

**New Partner Meetings:** 2

**End of First Year Renewals:**



Matt  
Wilkerson  
Director of  
Partner Success

Partner Engagement

**Partner Visits (10/mo):** 19 in-person visits ( multiple " pop-ins " to introduce myself )

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

**Partner Videos (8/mo):** 16 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:** 3

**BCEP Cold Calls:** 12

**BCEP New Partner Meetings:** 6

**BCEP Sponsorship:** \$0

**BCEP Partner Upgrades:** none



Jim Pazda

Director of Partner  
Services

Partner Services

**Partner Touches:** 77 Outreaches > includes service requests/updates/profile changes/constant contact updates/troubleshooting

**Retained Partners:** 4 partners retained from 60-90+ days past due

**Partner Upgrades & Value:** 0

**Partner Events (Scheduling & posting):** 37



Louisa Barton

Director of Equine  
Engagement

Equine Engagement

**Equine Initiative Meeting:** Christmas Equine Meeting at the Marchador Farm with 39 partners present with a Marchador 101 and Equine 201, demos and Christmas celebration with Brazilian cuisine and a live singer sponsored by Equifence of Florida

**Equine 101 & 201:** Marchador 101 and Equine Initiative 201 sponsored by Dillon Media

**Farm/Venue/School Visit:** Oak Bell Farm - CC Bellandi Marchador Farm

**Equine Events and Community Meetings:** Attended the American Association of Equine Practitioners (AAEP) in Orlando, networking and learning about new equine tech products

**Equine Industry Promotion:** Wrote the equine newsletter and wrote the Everything Equine section for Ocala Magazine. Gave out information about the Equine Initiative at the AAEP to vendors at the trade show



Kimberly  
Langley

Executive  
Assistant

Finance & Administration

Past Due Outreach - 45

Verify All New Partners Billing: December 2024

Pull Renewal Report - December 2024

Pay All Open Invoices Weekly - December 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 approved (pending receipt) (TD Bank) - \$5000 Papa Johns Grant (LOMY) - 10K PNC Grant

Applications pending: FL Blue (\$50,000)

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

The Catalyst had 22 downloads/views between all channels including YouTube.



Sullivan  
Hogan  
Director of Video

Communications

Weekly Buzz Views: There were 4534 views for episodes 293 - 296 well exceeding our stretch goal average of around 2650 views per month, with episode 295 notably reaching over 1.4K views on Facebook.

CEP on the Scene Views: There were 585 views for CEP on the Scene this month.

POV Ocala Views: There were 2133 views for episodes 69 & 70.

**Irregular Series Views** (Closer Look, Leading):

Additional Internal Videos: one promo for ticket sales for Annual Luncheon and a filmed BOTR



Arin  
Conrad  
Director of  
Communications &  
Marketing

Communications

**New Facebook Followers:** 60 new monthly followers | 13,180 total followers

**FACEBOOK Post Reach:** 19.7k | **Engagement:** 1.5k | **Top posts:** Beyond Skin RC-3k, CEO Departure Press Release-2.8K, Elite Equestrian RC-2.8K, Gulf Atlantic Bank BAH-1.7K, Sparr Building RC-1.6K, Stay APT RC-1.5K, December EM Pics-1.5K, Papa Johns Press Release-1.2K | **Overview:** Posts that are shared by our followers expand our audience, further amplifying our overall reach.

**FACEBOOK Group Reach:** 2,807 | **INSTAGRAM Reach:** 1.6k (CEP), 1.1k (ODM), 0 (Equine), 50 (BellevueCEP)

**Email Blast Open Rate:** Number of people opening email blasts are at 10,749 - click rate 856 | **Open Rate: 48%** | **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:** 6,661 | **Average Session:** 00:03:27 | **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:** 13,097 organic impressions with 49 new followers at 3,210 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.



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, July 25,171= +141 IG 3504=+103, Nov 25,665 IG 4033 Dec 25,781 IG 4.158**

**Market Vendors (336/mo):** Jan 332, Feb 376, March 462, April 408, May 417, June 402, July 341, Aug 462, Sept 411, Oct 407, Nov 570, Dec 427

**36 Pavillion Rentals for the year:** Jan 6, Feb 4, March 4, April 5, May 4, June 4, July 3, Aug. 1, Sept 7, Oct 6, Nov 4, Dec 5

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

**Provide 2 Vendor Workshops a Year:**



N/A

TBD