



Tamara Fleischhaker
VP of Business
Advocacy &
Partner Services



Joe Reichel
Director of
Business
Advocacy

| | January | February | March | April | May | June | July | August | September | October | November | December | Total |
|--|-------------------|-------------------|----------------------|----------------------|----------------------|----------------------|----------------------|---------------------|---------------------|---------------------|---------------------|---------------------|-------|
| Quest: 2020 Asheville | Planning underway | Planning underway | New Dates: 9/29-10/1 | New Dates: 9/29-10/1 | New Dates: 9/29-10/1 | New Dates: 9/29-10/1 | New Dates: 9/29-10/1 | New Dates: 3/30-4/1 | New Dates: 3/30-4/1 | New Dates: 3/30-4/1 | New Dates: 3/30-4/1 | New Dates: 3/30-4/1 | 0 |
| Attend 1+ Gov Workshop(s) | 1 | 1 | 1 | 5 | 2 | 2 | 3 | 2 | 1 | 1 | 1 | X | 20 |
| Two Partner Surveys | X | X | X | 1 | 1 | X | X | X | 2 | X | X | X | 4 |
| Two Partner Workshops | X | X | 2 | 1 | X | 2 | X | X | X | X | X | X | 5 |
| CEPI Sales Tax Campaign | Fundraising | Fundraising | Fundraising | X | X | X | X | Fundraising | Campaign Underway | Campaign Underway | Yes = 70.32 % | Yes = 70.32 % | 1 |
| eM Attendance Average 275 | 338 | 262 | X | 77 | 89 | 193 | 143 | 156 | 165 | 207 | 204 | 166 | 182 |
| Host 2 sessions elected officials & business | X | X | X | 3 | X | 2 | 4 | X | X | 1 | X | 1 | 11 |
| An election guide for candidate & issues | X | X | X | X | X | X | X | X | X | X | X | X | 0 |
| Attend 4+ local gov. meetings each month | 4 | 5 | 3 | 4 | 4 | 4 | 3 | 5 | 4 | 4 | 4 | 4 | 48 |
| Assist partners with Advocacy Issues | 10 | 12 | 12 | 7 | 8 | 8 | 6 | 7 | 9 | 10 | 6 | 0 | 95 |

Notes: December was a slow month for individualized advocating.

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Brett Barnes

VP of
Job Creation

| | January | February | March | April | May | June | July | August | September | October | November | December | Total |
|---|---------|----------|-------|-------|-----|------|------|--------|-----------|---------|----------|----------|-----------|
| Attend Trade Shows (3) | X | 1 | X | X | X | X | X | X | 2 | X | X | | 3 |
| Site Selector Visits in Key Markets (25) | 3 | 1 | 4 | X | X | X | X | 1 | 1 | 6 | 5 | 5 | 26 |
| FAM Tour (1) | X | X | X | X | X | X | X | X | X | X | X | 0 | 0 |
| Host Consultant Events in Key markets (3) | X | X | X | X | X | X | X | X | X | 0 | X | 0 | 0 |
| Digital Marketing (Qtly) | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | X | 1 | 11 |



Erin Jones

Director of
Healthcare
Development




| | | | | | | | | | | | | | |
|---------------------------------|--|--|--|----|----|----|----|----|----|----|----|----|---------|
| Communication Highlight (mthly) | | | | 2 | 2 | 2 | 1 | 2 | 2 | 4 | 5 | 6 | 26 |
| Touchpoint Calls/Emails (10) | | | | 55 | 13 | 15 | 20 | 45 | 25 | 80 | 45 | 50 | 38.6667 |
| Webinar (Quarterly) | | | | 1 | 1 | 0 | 0 | 0 | 0 | 1 | 1 | 0 | 4 |
| HC Strategy Check (Qtly) | | | | 0 | 0 | 1 | 1 | 2 | 2 | 1 | 5 | 4 | 16 |
| HC NEXTworks Event | | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 |




Notes:




Project Lorem has joined CEP as Legacy partners



Project Pasafino- ready to move forward with site/bldg. selection for 2021 in Ocala, for Reasearch/BIO Pharm manf. Facility



Pilot of OFR/CTE CPR Hands only in Nov. for Station to School, will continue pilot in 2021, meeting in january

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|---|-----------------------------------|---------|----------|-------|-------|-----|------|------|--------|-----------|---------|----------|----------|---------------|
|  Ryan Lilly VP of Business Creation | New Clients (125) | 13 | 14 | 12 | 14 | 11 | 10 | 11 | 9 | 12 | 10 | 12 | 9 | 137 |
| | Targeted Events/Shows (6) | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| | 2nd Stage Prospects (50) | 0 | 5 | 0 | 3 | 2 | 2 | 2 | 1 | 1 | 1 | 0 | 0 | 17 |
| | 2nd Stage Site Visits (8) | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 2 |
| | 2nd Stage Locations (4) | 0 | 0 | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
|  Jessica McCallum Director of Business Creation | Avg 1MC Attendees (45) | 43 | 45 | 25 | 10 | 18 | 15 | 15 | 13 | 14 | 12 | 14 | 15 | 20 |
| | PPBI Occupancy (min 50%) | 80% | 71.40% | 76% | 71% | 75% | 85% | 85% | 85% | 85% | 85% | 80% | 80% | 85.00% |
| | Social Media Content (12) | 12 | 8 | 15 | 14 | 12 | 15 | 7 | 5 | 6 | 6 | 4 | 8 | 112 |
| | Resident Programs (12) | 0 | 1 | 0 | 1 | 1 | 0 | 0 | 1 | 0 | 1 | 0 | 1 | 6 |
| | Incubator Tours (12) | 1 | 1 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 10 |
|  Cherrietta Prince Director of Entrepreneurship Services | New Clients (100) | | | 14 | 24 | 32 | 59 | 38 | 61 | 34 | 38 | 41 | 29 | 370 |
| | FastTrac Courses (2) | | | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 1 | 0 | 0 | 2 |
| | West Ocala Touches (?) | | | 4 | 14 | 15 | 11 | 9 | 8 | 9 | 13 | 7 | 5 | 95 |
| | Marion Oaks Touches (?) | | | 3 | 2 | 13 | 7 | 8 | 7 | 11 | 14 | 9 | 4 | 78 |
| | Silver Springs Shores Touches (?) | | | 0 | 3 | 12 | 18 | 13 | 7 | 7 | 11 | 8 | 5 | 84 |

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|---|----------------------------------|---------------|--------------|--------------------|----------------|---------------|--------------------|----------------|----------------|---------------|--------------------|---------------|---------------|------------------|-----------|
|  Bart Rowland Director of Business Retention | Retention visits-200 | 30 | 19 | 104 | 42 | 18 | 14 | 21 | 22 | 24 | 26 | 21 | 21 | 362 | |
| | New jobs created-375 | 0 | 21 | 150 | 0 | 0 | 160 | 0 | 7 | 25 | 0 | 116 | 0 | 479 | |
| | Capital Invest.-\$6MM | 0 | \$2 | \$10 | 0 | 0 | \$3.20 | \$2.20 | \$9 | \$5 | \$25.50 | \$4 | 0 | \$60.9 MM | |
| | Talent Center referrals-90 | 14 | 8 | 34 | 5 | 11 | 7 | 4 | 5 | 16 | 2 | 5 | 17 | 128 | |
| | Inside Ind. Ocala avg 50 | 0 | 0 | cancelled COVID-19 | 0 | 0 | cancelled COVID-19 | 0 | 0 | 0 | cancelled COVID-19 | 80 | 0 | 0 | 80 |
|  Dean Blinkhorn Director of Talent Development | One-on-one meetings-30 | 4 | 9 | 5 | 3 | 3 | 5 | 3 | 6 | 7 | 7 | 7 | 5 | 64 | |
| | Committee meetings-20 | 2 | 4 | 3 | 3 | 0 | 2 | 1 | 0 | 2 | 2 | 3 | 6 | 28 | |
| | CTE meetings-20 | 5 | 5 | 2 | 0 | 5 | 0 | 2 | 2 | 4 | 3 | 4 | 4 | 36 | |
| | NEXTworking-400 studs, 70 bus | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | Educator engagements-20 | 3 | 5 | 5 | 3 | 0 | 3 | 3 | 0 | 3 | 2 | 3 | 1 | 31 | |
|  Bryce Morrison Director of Talent Attraction | LLH Website Visits (2k/mo) | 1,490 | 4,040 | 7,834 | 6,434 | 4,816 | 4,458 | 5,083 | 5,230 | 4,890 | 5,268 | 5,100 | 5,155 | 59,798 | |
| | LLH Relo Guides Sent (20/mo) | 28 | 14 | 14 | 11 | 14 | 18 | 19 | 23 | 13 | 34 | 30 | 28 | 246 | |
| | Avg. Google CTR & CPC (2%,\$.20) | .6% \$1.09 | .8% \$.18 | 1.2% \$.09 | 0.83% \$.07 | 1.2% \$.07 | 1.39% \$.09 | 1.65% \$.08 | 1.79% \$.07 | 1.8% \$.07 | 1.8% \$.06 | 1.8% \$.06 | .63% \$.27 | .81% \$.27 | 0 |
| | Content Created (10/mo) | 20 | 15 | 15 | 20 | 15 | 16 | 10 | 13 | 18 | 13 | 12 | 13 | 180 | |
| | HR Meetings (2/mo) | 2 | 1 | 2 | 2 | 2 | 3 | 2 | 2 | 2 | 3 | 3 | 3 | 2 | 27 |

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|---|------------------------------------|----------|----------|---------|---------|--------------|---------|-------------|-------------|-------------|---------|----------|----------|------------------|
|  Tom James Director of Networking & Partner Services | Executive Partner Visits-86 | 1 | 3 | 92 | 48 | X | 5 | 7 | 4 | 6 | 4 | 11 | 3 | 184 |
| | Exec Partner Events-10 | 0 | 0 | 1 | X | X | 1 | 1 | 0 | 0 | 1 | 2 | 0 | 6 |
| | Sponsorship rev - \$100,000 | \$21,175 | \$7,550 | 10,625 | \$5,000 | \$27,000 | \$4,200 | \$1,750 | \$4,950 | \$7,000 | \$6,500 | \$28,500 | \$7,350 | \$131,600 |
| | Business After Hours -4200 | 410 | 415 | X | X | 28 - virtual | 177 | 18- virtual | 31- virtual | 29- virtual | 210 | 230 | 235 | 1677 |
| | CEP 101 -144 | 14 | 16 | virtual | virtual | virtual | 11 | 9 | 16 | 15 | 13 | X | 9 | 103 |
|  Andrea Bailey Director of Business Services | Tuesday Talk Attendance Average 19 | 33 | 19 | 36 | 27 | 28 | 34 | 43 | 29 | 32 | 27 | 49 | 36 | 16 |
| | Friday Talks Attendance Average 25 | 21 | 10 | X | 29 | 35 | 16 | 18 | 12 | 9 | 10 | 15 | X | 18 |
| | LOM -30 Participants | 30 | 31 | 25 | X | X | 12 | 22 | 22 | 22 | 22 | 21 | 21 | 23 |
| | LOMY - 35 Participants | 30 | 30 | 26 | X | X | X | 28 | 28 | 28 | 28 | 28 | 28 | 28 |
| | YPO - Hold 2 events monthly | 2 | 3 | 2 | 0 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 1.92 |
|  Jess Schultz Partner Relations Associate | New Partner Meetings | 19 | 15 | 8 | | | | | | | 12 | 15 | 20 | 89 |
| | Cold Calls to Potential | 34 | 30 | 43 | | | | | 49 | 28 | 30 | 65 | 40 | 319 |
| | New Partners this month | 13 | 9 | 13 | | | | | 14 | 6 | 6 | 4 | 16 | 81 |
| | End of 1st Year Renewals | 2 | 5 | 1 | | | | | | | 0 | 0 | 0 | 8 |
| | Upgraded Partners | 1 | 1 | 0 | | | | | 1 | 1 | 0 | 0 | 0 | 4 |

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|  TBD Director of Partner Engagement | RC/GO/GB (5) | 7 | 9 | 3 | | | | | 1 | 1 | 6 | 5 | 4 | 4.5 |
| | 90 Days Past Dues Received | \$2,700 | \$11,675 | \$5,600 | | | | | | | | | | \$6,658 |
| | Partner Retention Calls (30) | 38 | 32 | 75 | | | | | | | | | | 48.3333 |
| | Partner Visits (20) | 25 | 23 | 5 | | | | | | | | | | 17.6667 |
| | President's Lunch Attendees (15) | 23 | 17 | | | | 31 | 16 | 18 | 20 | 18 | 7 | 14 | 18.2222 |
|  Louisa Barton Director of Equine Engagement | Equine Meetings (10) | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 12 |
| | Equine 101s (2) | X | X | 1 | X | 1 | X | 1 | 1 | X | 1 | 1 | 1 | 7 |
| | Farm Visits (10) | 2 | 1 | 1 | 2 | 3 | 2 | 1 | 2 | 1 | 3 | X | 1 | 19 |
| | Equine Events (6) | 1 | 1 | 1 | X | X | X | X | X | X | 2 | 2 | 2 | 9 |
| | Equine Industry Promotion (5) | 5 | 1 | 2 | 1 | 1 | 2 | 3 | 2 | 1 | 1 | 1 | 2 | 22 |
| Notes: | | | | | | | | | | | | | | |
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|  Olana Osborn Director of Communication | Weekly Buzz views | 3,978 | 2,253 | 2,668 | 4,024 | 4,538 | 3,462 | 2,659 | 3,425 | 2,673 | 7,604 | 7,236 | 2,687 | 3,934 |
| | Facebook Posts reach | 10,850 | 4,785 | 15,133 | 105k | 41,569 | 79,651 | 43,539 | 24,281 | 29,392 | 46,488 | 51,626 | 18,559 | 33,261 |
| | Email Opens | 8,675 | 7,175 | 8,052 | 10,764 | 8,891 | 8,041 | 6,660 | 8,698 | 8,361 | 9,570 | 7,885 | 5,697 | 8,206 |
| | Website reach | 9,985 | 9,028 | 13,172 | 17k | 12,349 | 8,701 | 7,308 | 8,986 | 7,622 | 10,785 | 9,302 | 8,987 | 9,752 |
| | Extra Videos (1 mo) | 5 | 1 | 6 | 3 | 3 | 6 | 6 | 2 | 3 | 3 | 1 | 1 | 40 |
|  Dawn Bowman Interim Director Ocala Downtown Market | Increase FaceBook Followers (50 mo) | 106 | 106 | 223 | 202 | 197 | 93 | 99 | 133 | 141 | 1088 | 190 | 180 | 2758 |
| | Increase Market Vendors (2 mo) | 2 | 2 | 1 | 2 | 0 | 2 | 3 | 2 | 0 | 22 | 14 | 12 | 12 |
| | 8 Pavillion Rentals for the year | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 1 | 3 | 7 |
| | 3 self generated ODM events | 0 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 1 | 1 | 2 | 6 |
| | Provide 2 workshops a year | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Notes: | | | | | | | | | | | | | | |
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