

PROGRAM PERFORMANCE REPORT

ORGANIZATION: Southwest Florida Economic Development Alliance, Inc.

PROGRAM: Economic Development

REPORT PERIOD July 1, 2016 THROUGH September 30, 2016

PERCENTAGE OR SCOPE OR SERVICES OR COMPONENTS OF CONTRACT

COMPLETED 100%

I. ACCOMPLISHMENTS:

Report No.	A: Staff & Operations	B: Marketing Outreach Accomplishments
1. Submit on or before, January 31, 2016, for the period October 1, 2015 thru December 31, 2015.	a. Maintain a Director and Support Staff. See Art IV below for submittals.	a. Annual Marketing Plan approved and implemented. <i>(2016 Plan Approved Dec 2015 and 2015 Plan Activities Completed)</i> b. Progress toward (4) Marketing Events during term of Agreement. <i>(6 Completed for 2015 and 3 Confirmed for 2016)</i> c. Report on prospect and contact activity. <i>(See Other Comments Below)</i> d. Report on web traffic data including specific marketing penetration metrics. <i>(Google Analytics Report Provided)</i>
2. Submit On or before, April 30, 2016, for the period January 1, 2016 thru March 31, 2016.	a. Maintain a Director and Support Staff. See Art IV below for submittals. <i>(Support Staff Replaced During Quarter)</i>	a. Progress toward (4) Marketing Events during term of Agreement. <i>(1 event completed and 2 confirmed for April)</i> b. Maintain & enhance website attributes. <i>(Website Data Updated and New Video Integration Underway)</i> c. Report on prospect and contact activity. <i>(See Other Comments Below)</i> d. Report on web traffic data including specific marketing penetration metrics. <i>(Google Analytics Report Attached)</i>
3. Submit On or before, July 31, 2016, for the period April 1, 2016 thru June 30, 2016.	Maintain a Director and Support Staff. See Art IV below for submittals.	a. Progress toward (4) Marketing Events during term of Agreement. <i>(5 events attended during period and 3 confirmed for next period)</i> b. Maintain & enhance website attributes. <i>(4 testimonial videos and one overview video completed. Data updated with dynamic charts added)</i> c. Report on prospect and contact activity. <i>(See Other Comments Below)</i>

		d. Report on web traffic data including specific marketing penetration metrics. <i>(Google Analytics Report attached)</i>
4. Submit on or before October 10, 2016, for the period July 1 to September 30, 2016.	a. Maintain a Director and Support Staff. b. Annual Report Presentation to the Collier County Board of Commissioners Accomplished. See Art IV below for submittals.	a. Progress toward (4) Marketing Events during term of Agreement. 3 events attended during period) b. Maintain & enhance website attributes. (Data updated and began comprehensive update audit to “refresh” look and content) c. Report on prospect and contact activity. (See Other Comments Below) d. Report on web traffic data including specific marketing penetration metrics. (Google Analytics and Social Media Reports attached)

II. PROBLEMS:

No problems of significance are noted for the reporting period. The Marketing Advisory Committee continues to meet and modify the marketing outreach plan for 2016 based on the staff turnover at 4 of the 5 local county partner agencies during the term of this agreement.

III. STATUS REPORT ON PROVISION OF SERVICES: (include report period and year-to-date)

SCOPE OF SERVICE PROVIDED	ANNUAL PROGRAM GOAL	REPORT PERIOD	YEAR TO DATE	% OF GOAL
Marketing Outreach & Site Selector Relationships	Approve Annual Marketing Plan.	2016 Marketing Plan approved by Alliance Board of Directors and Marketing Advisory Committee December 3 & 10	Accomplished	100
	4 Marketing Events	Six Completed from 2015 Calendar Year Marketing Plan 2016 Outreach Events Scheduled with input from the Marketing Advisory Committee	<ul style="list-style-type: none"> • Attended IEDC 10/4 -10/7 • Attended FITCE 10/13 – 10/15 • Attended CCIM 10/26 – 10/29 • Attended MD&M 11/18 & 11/19 • Hosted Site Consultant Dinner in Austin 10/26 • Hosted Prospect and Consultant Event in Orlando 	100

			<ul style="list-style-type: none"> 11/18 • Attended SSG 2/24 – 2/26 • Attended CCIM 4/2 – 4/6 • Attended Illuminations 4/6 – 4/8 • Attended FA&M 4/10 – 4/13 • Sponsored RETIS visit to Naples 5/23 – 5/25 • Attended SelectUSA 6/19 – 6/22 • Attended 2016 Logistics Development Forum 8/2 – 8/4 • Chicago Market Visit 8/4 • RETIS Outbound Market Visit 9/18 – 9/22 • Attended IEDC 9/25 – 9/28 	
	Prospect and Contact Activity	Activity is Tracked in Salesforce	<ul style="list-style-type: none"> • Reports are updated monthly. (See Other Comments for Summary.) 	100
Website & Data	Maintain website and regional data	Content and Data Updated Monthly	<ul style="list-style-type: none"> • Blog Posted Monthly • Social Media Engagement Multiple Weekly Posts • Search Engine Optimization Updated Monthly • Content and Data Updated with Dynamic Charting • Videos Added 	100
Staff & Operations	Maintain a Director and Operational Support Staff	2 FTE's Employed by the Alliance	<ul style="list-style-type: none"> • Staff in place to fulfill mission 	100
	Annual Report	2015 Activity	2015 Activity Report	100

	to BOCC	Report Submitted to BOCC	Submitted 11/13/2015	
		2016 Report Due 10/10/2016		100

*Acronyms above stand for: IEDC – International Economic Development Council; FITCE – Florida International Trade & Cultural Expo; CCIM – Certified Commercial Investment Member Institute; MD&M – Medical Device & Manufacturing; SSG – Site Selectors Guild; FA&M – Food Automation & Manufacturing

IV. OTHER COMMENTS:

New leads for the reporting period included SelectUSA Summit regional office project, financial service center back office, and a micronutrient company. The Alliance assisted with Project TNT during the period as well. As previously reported for the June 30th report, three leads were responded to: two call center requests and a financial service center back office. As previously reported, the Medical Device & Manufacturing show resulted in 28 company prospects shared with the regional partners. One lead was generated for Collier County from the CCIM Market Visit with the Site Selection Consultant contacting Opportunity Naples Directly. One project, in final due diligence in Glades County, was secured from MD&M and continues to build into multiple leads for the project.

The Alliance President toured the City Gate development in December and specifically marketed this permit ready project to the national site consultant's database.

During the reporting period the Alliance led regional participation at the 2016 Logistics Development Forum in Chicago, represented the region during the RETIS outbound market visit and attended the IEDC Annual Conference meeting with 14 site location consultants.

18 one-on-one company meetings were held at the SelectUSA Investment Summit with one lead already coming through with the anticipation of more of these meetings converting to new projects.

Other 2016 Marketing Outreach Activities included sponsoring the "Wake Up with Southwest Florida" breakfast for the national Site Selectors Guild conference and the Alliance being the National Chairman-level Partner of the CCIM Institute. The Alliance led regional attendance at the CCIM Institute Leadership Meetings in Chicago with an associated market visit with site location consultants, Food Automation & Manufacturing Conference, and 2016 SelectUSA Investment Summit held in Washington, D.C. The Marketing Advisory Committee modified the 2016 outreach plan and added the 2016 Logistics Development Forum, Fall Forum for the Site Selectors Guild, and a market visit to New York/New Jersey.

The Alliance sponsored the Enterprise Florida Board meeting held in Naples on May 10th and 11th. Attended the Florida Economic Development Council annual conference May 15th to May 17th. Attended Governor Scott's Degrees to Jobs Summit May 24th to 26th. Presented to Wake Up Naples on June 8th unveiling our new testimonial day-in-the-life videos.

SUPPORTING ATTACHMENTS: Along with the above status report, provide Project details for the deliverables delineated in Exhibit A. For specific activities and accomplishments submit supporting documentation listed below or other documents, which support accomplishment of deliverable. With regard to staff accomplishments submit timesheets signed by supervisors, payroll reports, bank statements, payroll related canceled checks, and supporting documentation for payment of benefits and payroll taxes (SUTA, FUTA, Medicare may use IRS 941 or Form RT-6).

PAYMENT RECORD CHART FOR ALLIANCE AGREEMENT
 REPORT PERIOD October 1, 2015 THROUGH September 30, 2016

No.	Budget Category	Annual Budget	Expenditures		Remaining Balance
			Current Request	YTD Request	
1	Salaries including benefits	\$100,000	\$0.00	\$100,000	\$0.00
	Total	\$100,000	\$0.00	\$100,000	\$0.00