

1997

The Kevin Coleman Foundation Profile, September 1997

Purpose & Mission

- Incorporated in 1988 by Coleman Professional Services to raise private donations to assist the parent organization in developing alternative funding sources so it could become more self-reliant in providing behavioral health services. The primary purpose of the Kevin Coleman Foundation is to raise money to help support the mission of Coleman Professional Services.
- Mission Statement: "To acquire a variety of assets to ensure the long-term ability of Coleman Professional Services to provide behavioral health care services. The Foundation solicits funds through fund-raising activities, gives awards to support and promote the mission of Coleman Professional Services and serves as an advocate for persons with mental illness."

Organization

- Two Permanent Trustees: the Coleman Professional Services board president (Joe Danks) and the Kevin Coleman Center's CEO (Nelson Burns)
- Three to eleven at-large trustees

Current Activities

- Own Rhodes Road building and lease to Coleman Professional Services
- Make grants to Coleman Professional Services for client services
- Annual Drive
- Fall Benefit
- Raise funds for special projects such as capital funds for client housing
- The Foundation's goal is to provide significant funds to support Coleman Professional Services by building endowment funds to \$1 million by 2001.

Future Activities Projected

- Phase II addition of Rhodes Road facility
- Major campaign for endowment. The Foundation hired a consultant to conduct a feasibility study, which will be ready late September 1997.

Trustee Responsibilities

- Attend meetings: Second Wednesday at 7:00 p.m. February, April, June, October and December
- Serve on a committee: meet January, May, July, September, November
- Personal financial support
- Help raise funds: Personal solicitation, identify prospects, help open doors for other solicitations
- Represent and promote Coleman in the community
- Serve as a community resource for Foundation and/or Coleman activities

Personnel

- Staff assigned to Kevin Coleman Foundation are John Peterson, Executive Director, and Linda Redfern, administrative assistant. Both are employees of Coleman Professional Services. The Foundation is assuming more staff expense and currently reimburses Coleman Professional Services \$15,000 annually for staff expense.

Fiscal Summary

- As of July 31, 1997, Kevin Coleman Foundation reported total assets of \$2,092,081 and a fund balance of \$717,070. The Foundation's current annual budget is \$349,650. Major sources of 1997 income are projected to include \$130,000 in donations, \$196,650 rental income and \$23,000 from investment income. Since 1989, the Foundation has raised over \$920,000.

*Document 30: Kevin Coleman Foundation Organization Chart

*Document 31: Kevin Coleman Foundation 1997 Roster

*Document 32 (a,b): Kevin Coleman Foundation Financial Highlight Report ending 7/31/97 (2 pgs.)

*Document 33 (a-o): Kevin Coleman Foundation Audited Financial Statements, December 31, 1996 (15 pgs.)

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