

**2004**

The information provided below is a highlight of the 2004 Fiscal Year:  
July 1, 2003 through June 30, 2004

- ➔ Coleman Professional Services completed the Sue Hetrick building in Ravenna for Evaluation and Crisis Service. This was the third of the three new buildings that began construction in 2003.
- ➔ Issue 27 (mental health and recovery levy) passed by 51%. Thanks to all of the volunteers who wrote letters, posted yard signs and donated their time to support the levy.
- ➔ Coleman received a Raven Award for the new construction of “The Burbick at Coleman Building.”
- ➔ The Portage County Mental Health Board increased Coleman’s contract to \$130,468 to help cover some of the loss due to the Portage Children’s Contract.
- ➔ Coleman’s consulting business expanded with new contacts in Ohio for Housing, Philanthropy, CARF and Strategic Planning.
- ➔ The number of individuals served at Coleman increased 9% from last year.
- ➔ Psychiatry was the most used service this year at Coleman. This was a change from the past two years when psychotherapy was the most used service.
- ➔ The employee turnover at Coleman remained low for the third year in a row. Also, Sage Computer Services hired 124 new people, significantly increasing its number of employees.

#### **Coleman Finances**

- ➔ Coleman Professional Services reported total assets of \$8,065,564 and net assets of \$3,490,604 for the 2004 fiscal year ending June 30, 2004. Annual operating expenses for the year were \$15,769,268.
- ➔ Public dollars increased 1% from last year, but as a percentage of total revenue, they decreased 4%. This is a result of the steady increase in Coleman’s enterprise, which is up 4.5% from last year, accounting for 35% of the total revenue.

#### **Corporate Goals :**

1. Serve more people who need help to live to improve their lives.
  - In 2004, Coleman’s goal was to serve 4,716 individuals, and 4,889 people were actually served.
  - Coleman’s goal for 2005 is to serve 4,900 individuals or more.
2. Increase the gross revenue source by 2.5% annually.
  - In 2004, Coleman’s gross revenue goal was \$15,435,506, and the actual gross revenue was \$15,840,801.
  - Coleman’s gross revenue goal for 2005 is \$16,236,821 or more.
3. To maintain administrative overhead at or below 11% of all operations.
  - In 2004, Coleman’s actual administrative overhead was 9.95%.
  - Coleman’s goal for 2005 is to keep administrative overhead at or below 11%.
4. Keep our employees happy, and provide a safe and enjoyable working environment.
  - Employees rated their satisfaction on a scale of 1-5, 5 being the highest.

- In 2004, employees rated their satisfaction at 3.9.
- Coleman's goal for 2005 is to maintain or increase the level of employee satisfaction at 3.9.

## **Operational Plan Goals Fiscal Year 2004-2005**

October 1, 2003 through July 31, 2005

### **Governance Board**

The Governance Board plans to develop new "oversight" measures for finance, human resources, clinical and public relations. Also, they will complete goals to assess and improve public image as well as expand participation in fundraising. Lastly, the Governance Board plans to establish a preliminary design and budget for a future Drop-In center.

### **Clinical**

The Clinical Department will complete new clinical protocol goals by fiscal year 2005. They plan to revise and improve the efficiency model of psychiatric services and achieve electronic records for all services. They also hope to achieve CARF and ODMH accreditation. Furthermore, the Clinical Department wants to establish "Show Case" service that meets evidence based practice criteria and recognize mental health and rehabilitation services to address public funding decline.

### **Operations and Construction**

Operations and Construction hopes to complete renovations of the Crisis Residential Area. They also plan to complete operations infrastructure goals for the 2005 fiscal year as well as complete the implementation phase and plan goals for Qualifacts. Lastly, Operations and Construction will reorganize the operations staff to become more efficient.

### **Human Resources**

The Human Resources Department will implement and complete a new human resources plan to help support succession. They also plan to establish and complete Time and Attendance for Sage Employees and personality testing for recruitment effectiveness.

### **Finance**

The Finance department will work with the Clinical department to revise and improve efficiency of psychiatric services at Coleman. They also plan to establish written fiscal procedures for the Kevin Coleman Foundation and complete the Qualifacts conversion of fiscal data. In addition, Finance hopes to complete the Medicaid and Non-Medicaid Funding Models to apply to the 2005 fiscal year.

### **Resource Development/Enterprises**

Resource Development and Enterprises hope to increase Sage Computer Services gross sales to \$5.5 million by the end of the 2005 fiscal year.

### **Accreditations and Licenses:**

- Commission on Accreditation of Rehabilitation Facilities for Residential, Vocational, Community Mental Health and Psychosocial Programs
- Ohio Department of Mental Health
- Ohio Department of Health

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