Caring for clients the Tasks way ... with Senior Lodges at Tasks Unlimited

Dear Tasks Unlimited supporters:

Living, working, achieving. That’s what Tasks clients do. Sounds simple, doesn’t it? But many Tasks clients have anything but simple histories. I’m truly amazed when I listen to their assorted stories: the obstacles they have faced and the challenges they’ve overcome. Many of our clients have spent cold sleepless nights on park benches, struggled with drugs, suffered physical and emotional abuse, dealt daily with discrimination due to their mental illness. Few of us can truly understand the ups and downs they’ve endured, but here they are at Tasks: living, working and achieving. They are stable. They are happy. They do great work.

A number of our clients have been with Tasks 30 plus years. While we are proud of that longevity, it has also become one of our greatest challenges. Like the American population in general, some of our clients are aging and getting ready for retirement. In true Fairweather spirit, we asked our clients where they wanted to go when their physical limitations made work difficult. It was not a huge surprise when they told us they did not want to leave the Tasks family. It also wasn’t a huge shock when we saw how few programs were available for people with serious and persistent mental illness who didn’t yet fit the nursing home environment but need a bit more support as they enter the sunset part of their lives.

So, we did what we do best...we started our own program. In December of 2012 we opened our first Senior Lodge. And, because we believe so deeply in the Fairweather model, we have clients, instead of staff, helping our seniors shop, clean and cook. You’ll read about one of those great clients in this report.

Like so many other non-profits and businesses, the economic downturn has been tough on Tasks. Our janitorial contracts have seen major cuts this year, cuts that have impacted staffing levels and client work hours. While we continue to be innovative in looking for and creating new opportunities, we are in need of your help. We have taken a number of cost saving measures to best preserve client hours, but, if you have a connection or an idea where we could find new work, please let us know.

Despite the economic difficulties, our staff and clients still have many things to celebrate. We celebrate living in our new Senior Lodge. We celebrate working every day. We celebrate achievement in all we do for people with serious and persistent mental illness.

And none of this could be accomplished without your support. For that, we sincerely thank you.

Respectfully yours,

Karen Johnston
Executive Director

After Forty Years, New Identity, Same Mission of Caring for our Clients

While our look may be changing, our mission remains the same. Everyone, including those with mental illness, deserve the chance at a meaningful life, a life full of LIVING, WORKING and ACHIEVING.

You’ll be seeing our new logo in a variety of new graphic endeavors, including the redesign of our Annual Report, newsletters, business cards and letterhead and more. As we continue into the 21st Century, our mission is the same, but our identity has a fresh, new look, reflecting all the new projects we’ve taken on.

Through our Lodge Training Programs we help our clients learn how to manage the daily ins and outs of their lives, from taking their medication and being mindful of their health to creating social networks of friends and colleagues to help support them in life.

Our new senior lodge in St. Louis Park.
At 56, Brian is no stranger to the complexities of enduring a life-long mental illness—the strain placed on family and relationships, the difficulties of landing and retaining a job, the general pressures of building and maintaining a healthy life. Diagnosed with bi-polar disorder in his junior year at the University of Minnesota, Brian spent his first of three stays at the Ramsey Hospital Psych Ward. Following this initial hospitalization, he was able to return to school and complete his Engineering degree, after which he was employed as a drafter for a local firm. But the realities of a debilitating mental illness struck when he suffered a relapse and was sent back to Ramsey Hospital. After one final hospitalization in 1981, Brian’s life became a downward spiral of odd jobs, inconsistent paychecks and dealing with the pressures associated with managing housing and day to day life with very little support.

After a short stint of living on the streets, “bouncing around from job to job, not really happy with anything”, and eventually landing in a half-way house for disabled people, Brian and his family realized that he needed a more stable network of support. It was in 1989, after a series of dishwashing and janitorial jobs that Brian found his way to Tasks. “I went through the Department of Rehab Services trying to get a job, any job, and I told them the problems I had being hired because of my bi-polar and they said there was this program.” Brian was initially introduced to the Tasks Training Lodge Program but because he had lived on his own for most of his adult life, it wasn’t a perfect fit. Having experienced the group living situations of the Psych Ward and the half-way house, Brian knew that he needed his own space where he wasn’t “constantly being pressured by other people...and feeling crowded.” Fortunately, Tasks was just rolling out a new program called JOB$, which offered employment, mental health services, and daily-living support to persons who live in their own apartments or homes. Brian is proud to say that he was “one of the very first JOB$ Training Program employees.”

Tasks Unlimited Clients … Living, Working, Achieving Their Goals!

MEET BRIAN KOLLING, PETE KEEGAN, AND ZANETA SCOTT

BRIAN KOLLING

Nothing bolsters self-esteem like having a meaningful role in your world. And, self-esteem broadens one’s vision of what is truly achievable in life.
BRIAN KOLLING continued

Since joining the JOBS program nearly 25 years ago, Brian’s work life has thrived, “I have a lot more support at Tasks, more than I’ve had any other place I’ve worked.” He started out as a janitor in the Federal Courts Building doing a number of tasks. “My job was buffing floors and that was very relaxing for me. No pressure.” After about five years of steady janitorial work (and a six-month hiatus from Tasks to pursue an internship doing computer drafting which ended in disappointment), Brian was welcomed into the Career Ladder Program at Tasks. Brian has maintained his supervisory title and is in charge of training new staff. In this program, Brian was trained to manage his janitorial contracts and supervise janitorial crews. Currently, Brian maintains his supervisory title and is in charge of training new staff. Though he is still using the skills and machines. Brian is able to use his knowledge and life experience to help provide support to others just entering the cycle of recovery and support that Tasks provided to him.

Through all of the ups and downs that Brian has endured, one overarching theme has emerged—Brian values his independence and derives great purpose from living, working, and achieving on his own terms. When asked what he likes best about the Tasks JOBS program, Brian’s answer was simple: “The freedom. The JOBS program is important because it gives me the freedom to think.”

Through his relationship with Tasks, this stability has made him keenly aware of his need to “shut down after work and just let it all go.” Still holding firm to a love of learning, Brian spends the bulk of his free time these days reading science fiction, practicing magic and studying chemistry and geology “for my own entertainment.”

Outside of work, Brian practices his trombone as much as he can these days and plays in a band called the Freedom Band. While Pete rides his bike for exercise, he and his other lodge mates have found that one of their favorite modes of activity these days is walking Lady, their dog of 3 years.

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For Pete Keegan, there is no better therapy for his battle with depression and mental illness than work. “It lifts my depression, really successfully too. So I am pretty lucky there.” Since finding the Tasks Unlimited Lodge Training and Job Training Programs about four years ago, Pete has been on a steady road of recovery and achievement. As a resident in Crown’s Lodge since early 2010, Pete lives with other adults with mental illness in a nearly self-sufficient environment where under the Fairweather model, they offer some support and help each other maintain their daily schedules, spaces and lives. As part of his work life, Pete does janitorial work, which he has found to be very “therapeutic.”

At 23, Pete’s emotional troubles really set in, “I was suddenly stricken with it, with my problems.” Unable to choose a career path or hold down a steady job, but still requiring money to live, Pete grew more and more “dependent on the county for survival.” Eventually he went into a day treatment program at Hennepin County Medical Center, where he was re-introduced to the therapeutic benefits of janitorial work. But the pressures of managing his emotional life as well as his daily life continued to be an issue. Spending several years homeless, Pete retreated from the city to lead an isolated existence in the country. While he found a level of contentment living in the woods, “I felt a little like Huck Finn, like I was free and could do what I wanted to do.” Pete eventually succumbed to what he refers to as “a nervous breakdown.”

After a six week stint in the Psychiatric Ward, Pete spent four years at Andrew’s Residence:

“I was kind of depressed about being there. It was a great place for people like me who need it, but I was also feeling kind of self-stigmatized about being there and I wanted a way out, but I didn’t know what it would be.” It was at this point that Pete remembered hearing about Tasks Unlimited, “where you could actually work… I used to do janitorial work when I first realized I had emotional problems and it was therapy for me. So that just kind of gave me some hope.” And Pete clearly takes great pride in his work. In fact, among Pete’s favorite memories since joining Tasks was doing well on one of his first work performance reviews; “that was a good one for me, made me feel really good.”

Outside of work, Pete has turned his attention to living a more balanced life by taking part in activities with his lodge mates, finding time to pursue a renewed interest in playing the trombone, and getting regular exercise. Pete practices his trombone as much as he can these days and plays in a band called the Freedom Band. While Pete rides his bike for exercise, he and his other lodge mates have found that one of their favorite modes of activity these days is walking Lady, their dog of 3 years.

In terms of goals for his future, Pete is certainly invested in broadening his horizons.

“Well, my goals before used to be to feel good on coffee and cigarettes and to kind of isolate and not share enough…Now, I’m trying to move away from relying on addictive things to regulate my mood and be more active socially.”

And Pete certainly seems to be achieving a lot of his goals these days—just consider how much he shared for this story. Finally, when asked how Tasks has helped him overall, Pete beams: “I think they helped me to recover, actually. I’m really thankful and grateful.”

Though a stable daily life is one of Brian’s major achievements through his relationship with Tasks, this stability has made him keenly aware of his need to “shut down after work and just let it all go.” Still holding firm to a love of learning, Brian spends the bulk of his free time these days reading science fiction, practicing magic and studying chemistry and geology “for my own entertainment.”

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Tasks Unlimited recently went through a review with the Charities Review Council, and we are glad to announce that Tasks Unlimited meets all twenty-seven of the Council’s Accountability Standards and was awarded the “Meets Standard” seal.

The Charity Review Council reviews nonprofit organizations in four areas: Public Disclosure, Governance, Financial Activity, and Fundraising. The review works to ensure that an organization’s operation, structure and policies meet widely accepted standards for accountability and transparency. The awarded “Meets Standard” seal will provide us with a visible and reassuring sign to our donors that we are an accountable organization and can be trusted with their donation. Mentioning to donors and other contacts that we have met all accountability standards of the Charity Review Council can do a lot to build trust in our organization and advance our cause.

We are now listed as a reviewed organization on the Council’s Smart Givers Network and in the Smart Giver newsletter distributed to households, businesses and nonprofits.

“I think I can focus more on my goals at Tasks… it’s helped with my mental health, the groups and stuff they have, the nice people… they help me with my income and really getting peace of mind. I got that here. Being in peace and quiet, I like that.”

While not working, Zaneta loves listening to music, “all kinds, R&B, rock n’ roll, gospel.” But as she has settled into life at Tasks and at the Senior Lodge, she is still transforming her life in positive ways. “I don’t even turn my music up that loud no more…cause I just want peace, so I can think.” And she has found peace here…living, working and achieving.

“I love working. I just hope I don’t lose this job for my arthritis and everything, because my case manager said if I can’t work I gotta go to another nursing home… I can’t really see myself there.”

And it is no wonder that Zaneta can’t imagine yet settling into a nursing environment because she clearly still has a lot of living to do as she sets some lofty goals for herself like getting her driver’s license and losing weight. As far as achieving her goals, Zaneta credits Tasks a great deal.

The Senior Lodge, like the other Tasks’ Fairweather lodges, offers members a group-run housing situation, but also offers the additional help of trained caretakers like Zaneta, and peer specialists, all of whom have worked previously in Tasks supported employment programs. Relatively new to Tasks programming, the Senior program is going a long way to help Tasks address one of its major challenges—how to help their clients age with dignity and keep them living independently with their peers in a cost-effective and long-term manner. Zaneta, like so many of her older peers with severe and persistent mental illness, has faced the risk of having to settle into long-term nursing home care even though she isn’t yet at that point in her life.

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“For Zaneta Scott, Tasks Unlimited has meant the difference between living in a costly, nightmarish hospital situation and living in a stable, inter-dependent environment that allows her to live, work and achieve in a more autonomous manner. From a nearly 16 year stint at St. Peter State Hospital in St. Peter, MN to a more recent 5 year stay at Andrew Residence, much of Zaneta’s adult life has been spent ‘in the system and going wherever my case manager tells me to go.’ While she was able to work sporadically in the kitchen or doing janitorial duties during her time at St. Peter, a stable and financially meaningful work life was never in her cards until she found Tasks Unlimited. Now, as an older adult, Zaneta’s already-complicated path has become even more difficult as she faces concerns over her arthritis and other physical limitations that come with age.

Internally doing janitorial work for Tasks, Zaneta has transitioned to a caretaker role in the Senior Lodge Program. While she enjoyed her previous janitorial work, she struggles more now with the physical demand. “I have chronic arthritis and sometimes it’s hard for me to work but I still keep trying to do it.” Now living at the Tasks Senior Lodge and working about 13 hours a week cleaning and doing housework there, she is able to still enjoy the therapeutic benefits of steady responsibilities, but with fewer physical demands.

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**Financials**

**STATEMENT FOR 2012**

**Assets**

<table>
<thead>
<tr>
<th>Liabilities and Net Assets</th>
<th></th>
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<tbody>
<tr>
<td>Cash</td>
<td>1,106,611</td>
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<tr>
<td>Accounts Receivable</td>
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<td>Investments</td>
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<td>Prepaid Expenses</td>
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<tr>
<td>Property/Equipment (net)</td>
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<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$10,157,479</strong></td>
</tr>
</tbody>
</table>

**Accounts Payable** 192,897

**Accrued Expenses** 527,429

**Long-Term Notes Payable** 5,416,589

**Total Liabilities** 6,136,910

**Net Assets (Unrestricted)** 4,020,569

**Total Liabilities and Net Assets**  $10,157,479

**EXPERENCES**

**Program Services:**

- Mental Health 1,794,589
- Training Center 501,049
- Lodge Program 1,011,160
- Vocation Rehabilitation 5,395,312
- Oakwood Residence 77,224
- Interlodge Residence 427,843

**Total Program Services** $9,207,177

**Support Services:**

- Management and Administrative 982,516
- Fundraising 159,993

**Total Support Services** $1,142,509

**Total Expenses** $10,349,686

**Change in Net Assets** $(256,107)

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**Tasks Unlimited 2012 Annual Report**

**Donors**

**ORGANIZATIONS**

- Allina Health
- Anoka-Metropolitan Regional Treatment Center
- Auxiliary
- Carolyn Foundation
- Catholic Community Foundation
- Dakota
- Michelson Foundation
- Open Door Foundation
- Otto Bremer Foundation
- Steep People Surplus Store

**DONORS UP TO $499**

- Aldrich, Susan
- Adams, Roder & Ruth (In honor of Bruce Ario)
- Allen, Norman & Patricia
- Anderson, Alan & Helen
- Anderson, Hazel
- Anderson, John & Judi
- Anderson, Perry & Katy
- Angle, Katie
- Antoniello, Jean
- Ari, Bruce
- Ayers, Michael & Judy
- Barbell, George & Loren (In honor of Helen Parkhill)
- Beebe, Lloyd (In honor of David Beebe)
- Beedle, Gerald (In honor of Kenneth Beedle)
- Benjamin, Mike
- Benson, Frances
- Bergman, Barbara
- Biemat, Betty and Paulje, Jim
- Blandell, Ll
- Borgen, Jan & Dan
- Brady, Rachel
- Brochin, Joseph
- Brogna, Brian & Kotts, Ciera
- Burbidge, John & Nancy
- Burton & Ed Goldas, Bonnie
- Carlsson, James & Anne (In honor of Paul Carlsson)
- Charles and Rebecca Lyon
- Christiansen, Charles (In honor of Kristine Haertl, PhD)
- Cole, Scott and Stephanie
- Collison, David
- Conkey, David & Harriet
- Cooper, Leah
- Cote, James & Carol
- Crow, John & Bonnie
- Cullen, Joanne
- Day, Terry
- De Vaul, Cheryl
- Delong, Mary
- Doen, Mark & Shari

**WE NEED YOUR REFERRALS**

In 2012, Tasks sustained over $1 million dollars in cuts to our janitorial contracts. We were able to recoup many of these losses through cutting expenses, reducing staff, and most painfully, reducing our client work hours. We also made the tough decision to mitigate some of the loss by eating into our reserves in order to preserve client work hours. While 2013 is looking much better, the only solution for long-term financial security is to create more client jobs. This is where we need your help...

If you know of any businesses or properties in need of janitorial or general cleaning help, please contact us.

While we do advertise widely, we’ve always highly valued the word of mouth help provided by our supporters. It’s been a tough year for all of us, but if you’ve always meant to connect us with a particular business, property, group, etc., this is the time. We truly appreciate your support.

---

**DONORS 500+**

- Anderson, Martha
- Ari, Georgette (In honor of Bruce Ario)
- Aschburger, Julia
- Ball, Cassandra
- Erickson, Charles (In honor of Mary Erickson)
- Hall, Clint
- Hurley, Michael and Joan (In memory of Patrick Hurley)
- Jackson, Danny & Karen
- Jorgenson, Bonnie (In honored Cindy Cardenas)
- Lee, Lydia & O’Dellmich, Michael
- Levin, Jane & Reisman, Judy
- Lisa Guerri-Montagne
- Menge, Pete And Sandy
- Olsen, Dave & Janet
- Punch, Howard & Nancy
- Schauder, Jennifer
- Shomion, Larry (In honor of Ann Shomion)
- Truax, Pam & Mary
- Valentine, Nick & Trepp, Sheryl
- Veldre, Brenda

**DONORS 500+ (In honor of Diane Wright)**

- Schult, Karen
- Schmid, Jim and Mary
- Schulte, Robert & Rosa, Mary
- Schwartz, Stan
- Segar, Joan
- Shomion, John & Pati
- Shomion, Richard & Gerre (In honor of Ann Shomion)
- Shomion, Tom & Sandy (In memory of Ann Marie Shomion)
- Simonson, Carol (In honor of Sharon Simonson)
- Simonson, Elizabeth (In honor of Sharon Simonson)
- Skare, Rodgers & Karin
- Smith, Jan
- Sorman, Eugene & Amelia
- Stake, Thomas
- Stellan, Jay & Judy
- Trandem, Mary et Bryan
- Van Horn, Oscar & Marion
- West, John
- Wight, Dale & Nora
- Wight, Russ and Darlene
- Wright, Sharon (In honor of Diane Wright)
- Yunkel, Jean
- Zwick, Joe

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**DONORS 500+ (In memory of Kristine Haertl, PHD)**

- (In honor of John)

**DONORS 500+ (In honor of Doug Gordon)**

- Grauer, John & Susan
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- Pigotte, Rosanne
- Prothe, Orral R.
- Reid, Tracy
- Rice, Tom & Natalie
- Rolando, Mary Ann
- Romine, Judith

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**DONORS 500+ (In honor of Diane Wright)**

- Zech, Paul

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**Note:** This document includes a financial statement and details on donors, as well as a section encouraging referrals for business and property cleaning services. The text provides a comprehensive overview of the financial health of the organization and highlights the importance of community support during challenging times.