

# TASKS UNLIMITED

*2013 and 2014  
Annual Report*



living.



working.



achieving.

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

## ▶ LETTER FROM THE EXECUTIVE DIRECTOR

Dear Tasks Unlimited supporters:



**Integrity. Inter-dependence. Diversity and inclusion. Respect.**

At the heart of every great organization is an understanding of the shared values that drive it towards its goals. With the help of our clients, staff, and board members, we worked diligently in 2013 and 2014 to identify the core values that make Tasks Unlimited what it is and that will help drive us towards what we want to become. While we've always believed in these values, we all agreed that it was time to write them down and create a formal Values Statement.

We believe that this Values Statement will remind us of our over arching priorities and will help guide our policies, decision making, and operations. As Tasks changes and adapts to the ever constant pressures of new rules and regulations, we want to be sure we don't lose sight of our roots.

At Tasks Unlimited, we are committed to a set of core values that not only define who we are, but also serve as guideposts to help us become the organization we would like to be. We strive for a workplace where opportunity, openness, enthusiasm, diversity, teamwork, accountability and a sense of purpose combine to provide a rewarding professional experience that promotes fairness, dignity and respect for all clients and employees.

The core values we identified are...

**Integrity**—We practice the highest ethical standards and honoring our commitments. We take personal responsibility for our own actions.

**Inter-Dependence**—We value the Fairweather model of inter-dependence and take action accordingly to promote the growth and success of our clients and peers in our workplaces and lodges.

**Diversity & Inclusion**—We value the skills, strengths, and perspectives of our diverse team. We believe in

fostering a collaborative workplace that engages everyone. **Respect**—We believe in the inherent worth of people and honor our relationships with those who choose to be part of our organization. We understand our imagination, determination, and dedication are essential to growth.

Beyond working on our Values Statement, 2013 and 2014 were very busy years for Tasks Unlimited. But then, aren't they all? As always, we're very proud of our clients for their many accomplishments. We are especially proud of the work they do on the job and in the communities where they live. Here are some noteworthy accomplishments:

- We opened a new lodge in South Minneapolis dubbed "The Moons" by its members. They love its location and its welcoming sense of home.
- Oakwood Lodge achieved full-fledged Fairweather Lodge status. The Oakwood Lodge program focuses on the housing and support of mothers and their children. Despite the loss of crucial funding, the moms pulled together and worked "inter-dependently" to keep the lodge afloat.
- In a "our clients are wonderful" moment, clients rallied around the loss of a Ramsey County contract by calling their county commissioners and attending a county board meeting. We're proud of their advocacy.

Finally, as we're talking about values, we can't help but tell you, our supporters, how much you are valued. Without your generous contributions and support, our work would be much more difficult. To all of you, we offer our heartfelt gratitude.

Respectfully yours,

# Financials STATEMENT FOR 2014 AND 2013

<b>SUPPORT AND REVENUE</b>	<b>2014</b>	<b>2013</b>
Support	\$249,413	\$298,519
Government Grants and Contracts	1,133,353	1,243,060
Employment Revenue	4,849,883	4,425,011
Program Service Fees	1,737,329	1,896,967
Client Service Fees	1,934,022	1,789,840
Investment and other income	44,939	285,913
Net Assets released from Restrictions	70,000	119,336
<b>Total Support and Revenue</b>	<b>10,018,939</b>	<b>10,058,646</b>

**EXPENSE**

<i>Program Services:</i>		
Mental Health	1,983,942	1,913,571
Training Center	529,387	504,668
Lodge Program	1,012,765	1,121,275
Vocational Rehabilitation	5,085,807	4,851,842
Oakwood Residence	49,520	34,026
Interlodge Residence	242,487	459,755
<b>Total Program Services</b>	<b>8,903,908</b>	<b>8,885,137</b>
<i>Support Services:</i>		
Management and General	962,845	932,063
Fundraising	68,199	69,279
<b>Total Support Services</b>	<b>1,031,044</b>	<b>1,001,342</b>
<b>Total Expense</b>	<b>9,934,952</b>	<b>9,886,479</b>
<b>Change in Net Assets</b>	<b>83,987</b>	<b>172,167</b>

**CONSOLIDATED BALANCE SHEET**

Assets	2014	2013
<i>Current Assets:</i>		
Cash	2,114,108	1,839,515
Account Receivables	1,121,611	1,677,224
Investments	9,986	259,635
Prepaid Expenses	178,156	90,964
<b>Total Current Assets</b>	<b>3,423,861</b>	<b>3,867,338</b>
Land, Buildings and Equipment - Net	6,587,278	6,172,407
<b>TOTAL ASSETS</b>	<b>10,011,139</b>	<b>10,039,745</b>
<i>Liabilities and Net Assets</i>		
<i>Current Liabilities</i>		
Accounts Payable	126,859	153,125
Accrued Expenses	547,106	538,216
Notes Payable	34,224	32,778
<b>Total Current Liabilities</b>	<b>708,189</b>	<b>724,119</b>
Notes Payable	5,138,310	5,171,918
<b>Total Liabilities</b>	<b>5,846,499</b>	<b>5,896,037</b>
<i>Net Assets:</i>		
Unrestricted	4,157,695	4,073,708
Temporarily Restricted	6,945	70,000
<b>Total Net Assets</b>	<b>4,164,640</b>	<b>4,143,708</b>
<b>Total Liabilities and Net Assets</b>	<b>10,011,139</b>	<b>10,039,745</b>



# Tasks Unlimited Clients ... Living, Working, Achieving Their Goals!

## ▶ MEET KATHY SCHMIT AND PA SONG

### KATHY SCHMIT



Inter-dependence is at the very heart of Kathy Schmit's experience at Tasks Unlimited. Kathy came to Tasks in May 2011 from a residential facility in Florida. After graduating from the Lodge Training Program, Kathy settled in at France lodge in Edina where she lives with her five other lodge mates. The lodge model has been a godsend for Kathy, giving her a great deal of independence as well as a strong supportive peer group that helps one another manage their daily lives.

As Kathy states, "We work together quite well with everyone having designated chores and encouraging each other...we work through struggles by discussions in our weekly meetings." This sense of inter-dependence is very important to Kathy and is beautifully illuminated as she describes cooking dinner for several of her housemates who worked late one night: "they were really thankful to come home to an already made meal. It's nice to be able to do this for each other."

Another major improvement in Kathy's life since finding Tasks is having steady employment. Kathy tried her hand at janitorial work but found that it was too hard on her body. Tasks worked with her to find an appropriate position and Kathy was thrilled when she was hired as a Housekeeper for Tasks Senior Lodge. Beyond the sense of purpose that holding down a job gives her, Kathy is delighted to have her own money which allows her to do one of her favorite things – shopping with her sister.

Outside of work and lodge life, Kathy stays busy sampling the variety of recreational activities that Tasks offers. She also enjoys baking and is hoping to start painting, an activity she used to enjoy. At the very core of her happiness in the Twin Cities is the camaraderie. "I have friends here. They shelter me. They treat me like family. We do stuff for each other."

### PA SONG



To call Pa Song a jill-of-all trades may be an understatement, especially where Tasks Unlimited is concerned. Pa joined the Tasks JOB\$ program in May of 2003. Once her training was completed, she joined the janitorial team at the St. Paul Federal Courthouse. This January will mark her ten year anniversary on that job.

With her extensive experience at the Courthouse, Pa starts out each shift as a floater and helps her team with a myriad of rotating daily tasks.

"I really like the variety of my job...and our team works well together," she says. Pa works with a team of approximately thirty other employees and they are supportive of one another on the job site.

The team is not just supportive of one another in a work context. Pa and several of her St. Paul Courthouse peers take part in a knitting group that one of their supervisors started. They meet most evenings after they clock out. Pa enjoys knitting because, "it keeps my hands busy and I'm less fidgety." In addition to the knitting group, Pa and others on her team enjoy walking the extensive St. Paul skyway system during the winter months.

Physical activity is very important to Pa, and she takes full advantage of the many types of fitness options that Tasks offers. Though Pa is very involved with Tasks programming, she does not live in a lodge. She owns her own house in St. Paul and lives there with two friends and her dog, Sugar. Pa grew up in St. Paul and has struggled with bipolar and general anxiety disorders since young adulthood. Before finding Tasks, she relied on the MN Workforce Center to help her find jobs and struggled to keep them. "It was stressful," she says. Pa remembers her first day of training at Tasks. They were sweeping and mopping and she considered quitting, "I thought: if I quit, I don't get paid. I decided to stay." Now, ten years later, Pa still loves her job with Tasks and looks forward to maintaining her productive and independent life.

# Tasks Unlimited 2013 and 2014 Highlights

## ▶ CLIENT NOW IN CHARGE OF SENIOR DAY PROGRAM, WAYZATA SELECTS TASKS

- The Senior Day Program is now client-run. Linda Kubalsky, a client of Tasks Unlimited as well as a Tasks Unlimited Board member, took over the running of the Senior Day program. She directs the daily activities of this program as well as manages our Laundry Service. This program now boasts a roster of 18 seniors who participate in recreational activities, crafts and socializing.
- The Laundry Services division expanded last year when we began laundering shirts from two additional Building Services contracts resulting in increased hours for the three laundry workers.
- We launched Tasks Unlimited Event Services! Clients cleaned up after several events in Excelsior, including the Arts Fair, 4th of July Celebration, and Apple Days. After receiving VERY positive feedback from Excelsior, the Wayzata Chamber of Commerce approached us for similar services, such as James J. Hills Days (*see picture, right*).



Clean up crew for Wayzata Chamber of Commerce's James J. Hill Days.



Enjoying the annual family picnic.

- We received our largest ever Wage Incentive check as a result of over-producing on client hours worked at our Building Services jobs contracts.
- A group of Tasks Unlimited clients took a trip to South Carolina, and another group of clients traveled to Pennsylvania to attend the National Fairweather Conference.
- Two clients served on the Coalition for Community Living Board of Directors, a national Fairweather organization.

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