

# TASKS UNLIMITED STRATEGIC PLANNING, 2023

Summary – All  
Working  
Sessions

Last Updated: September 5<sup>th</sup>, 2023



# Tasks Unlimited, Strategic Planning

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## Tasks Unlimited – Mission + Purpose + Values

### Purpose/ Philosophy Definitions:

**LIVING** - Grounded in the Fairweather Model, Tasks Unlimited supports mental health recovery by encouraging group decision-making and community living. By living and working as a group, program participants hold each other accountable in their mental health recovery

**WORKING** - Consistent, supportive employment is a key component to the mental health recovery process at Tasks Unlimited.

Through Tasks Unlimited Building Services, program participants perform janitorial services and mailroom management throughout the Twin Cities. We also offer job placement services and employment retention services for those wanting to work in the community.

**ACHIEVING** - 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.

**Mission (what we do):** Tasks Unlimited provides supported employment, housing and recovery services for people with mental illness so that they achieve a full life with the rights and responsibilities of adults in our society.

**Purpose/ Philosophy Statement (why we do it):** All people, including those with mental illness, deserve the chance at a meaningful life, a life full of LIVING, WORKING and ACHIEVING.

### **Values (how we live out the mission and purpose):**

Integrity | Inter-dependence | Diversity & Inclusion | Respect

### Values Definitions:

**Integrity** - We practice the highest ethical standards and honoring our commitments. We take personal responsibility for our own actions. We honor the rights and beliefs of our fellow staff, clients, and community. We act with integrity and honesty in all that we do. We value a culture of openness and inclusion in which everyone is treated fairly, with the highest degree of dignity, equality, and trust and where everyone has an opportunity to contribute.

**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. We are personally accountable for our own growth and learning and collectively responsible to encourage and support each other's growth and learning.

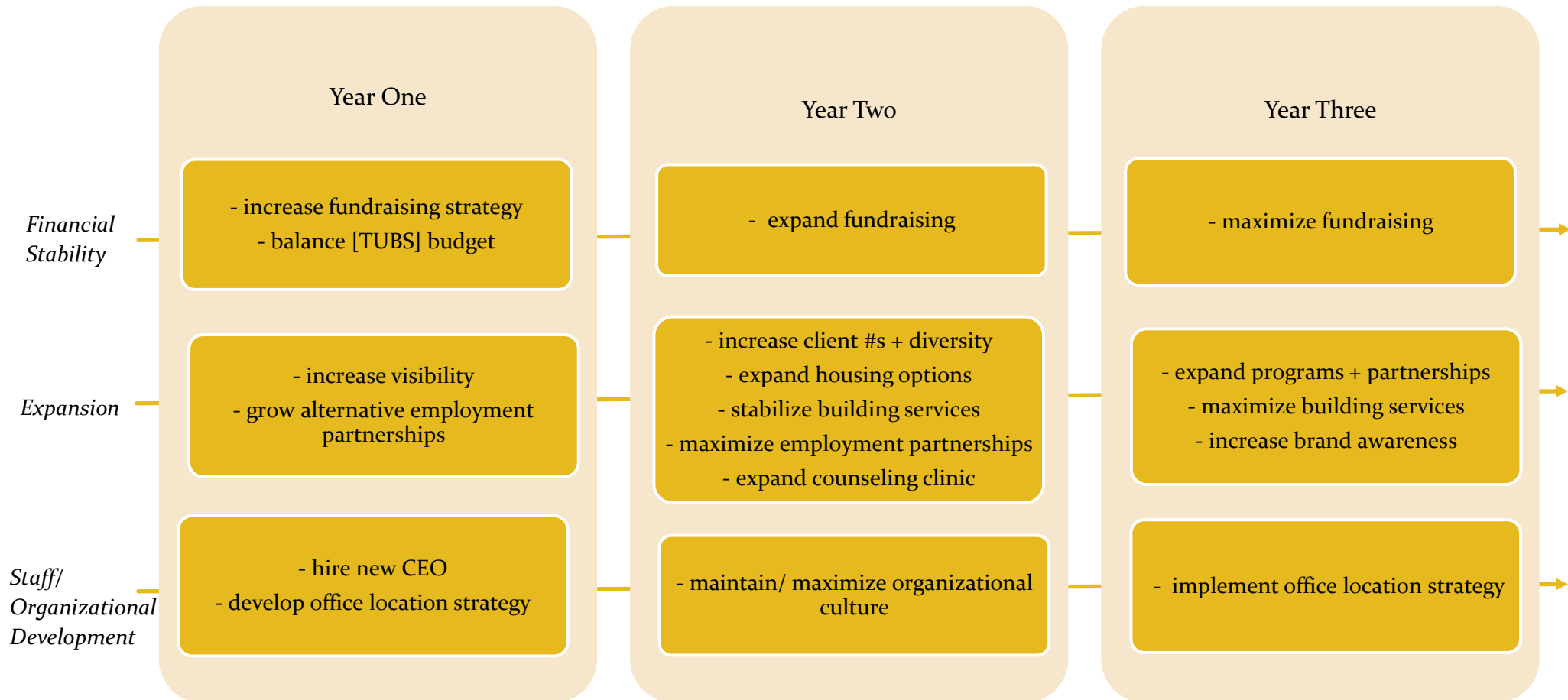
**Diversity & Inclusion** - We at Tasks Unlimited understand there is vast system of institutional discrimination embedded in the threads of our larger community, including in the housing, employment, and mental health systems. As an essential part of those systems, we recognize that we are all responsible for promoting equity and justice. Tasks strives to be an organization that is proactive in recognizing how history and current events as well as our structures and policies can cause and affect discrimination. We are committed to seeking equitable solutions and we value responsiveness and accountability at all levels of the organization and in our partnerships. We promise to hold space for diverse voices to do this work, to embrace a diverse staff and leadership in order to celebrate differences and improve our organization for all.

**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. We will work to celebrate and reward the unique backgrounds, viewpoints, skills, and talents of everyone at Tasks. Respect for people is measured by how we treat each other, by the contributions that flow from our diversity, by the productivity of our relationships, and by a job well done, no matter what the job.

## WHAT - Strategy Progression: Roadmap to Achieve Mission + Values

The diagram below illustrates the progression of strategic priorities over the 3-year period.

### 3 Overarching Strategic Priorities: Financial Stability | Expansion | Staff/Organizational Development



## WHAT – Year One, Strategic Priorities

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### *Year One – Areas of Focus & Measurements of Success*

- **Increase visibility in mental health community**
  - Measurements of success: increase awareness in mental health arenas (referrals/ speaking at events) | leverage partnerships to expand visibility | establish marketing plan/ targeted communication strategy (includes social media)
- **Develop office location strategy**
  - Measurements of success: research and clear understanding of available options | evaluate current location and usage | staff + board alignment on a strategy for future location
- **Diversify/ increase fundraising strategy**
  - Measurements of success: board buy in + engagement | more \$ in the door | development/ fundraising strategy to increase profit | new funding streams | improved fundraising program (increase new and major donors) | increase partnerships with long term/ongoing financial commitment | continue grant income
- **Grow alternative employment partnerships**
  - Measurements of success: identify future partner opportunities | not employer of record -provide extended employment outside of Tasks for additional profit | find 2 additional companies to hire clients | additional partnerships for supplies and/or service gaps | criteria for new partners
- **Achieve a balanced [TUBS] budget**
  - Measurements of success: contract renewals complete | maintain or grow staff
- **Hire new CEO aligned to mission/values**
  - Measurements of success: still on board | alignment with board/staff, mission, + values | overlap w/ Karen | continue cross collaboration with staff

## WHAT – Year Two, Strategic Priorities

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### *Year Two – Areas of Focus & Measurements of Success*

- **Stabilize building services**
  - Measurements of success: get paid for work | break even
- **Expand housing options**
  - Measurements of success: complex/house purchased | explore alternative housing options -purchase and/or partnerships (i.e., tiny homes) | meet service demand | keep Fairweather model | board buy in and engagement
- **Maximize employment partnerships (offering stable employment)**
  - Measurements of success: maintain with slight expansion | continue nurturing relationships and partnerships | increase opportunities for people we serve (additional opportunities) | continue to see stable employment rates
- **Increase client numbers + diversity**
  - Measurements of success: full contracts | increase clients from year one activities | increase or maintain census numbers
- **Maintain/maximize organizational culture**
  - Measurements of success: continue LT + MT meeting strategy | proactive plan for staff training and leadership development (+ keep new hire orientation) | board + staff aligned to mission and values | maintain collaboration across departments | minimize staff turnover | maximize staff team building/ relationships | board development, engagement, and increased diversity
- **Expand fundraising**
  - Measurements of success: continue work with grants (awareness of new grant opportunities) | continue progress from year 1+2 | increase in income/ revenue | expand major donors | expand volunteer opportunities | engage/ involve board
- **Expand counseling clinic**
  - Measurements of success: increase client #s | increase case management | extra locations for services (geographical expansion) | strategic and creative avenues for target audiences for services

## WHAT – Year Three, Strategic Priorities

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### ***Year Three – Areas of Focus & Measurements of Success***

*These goals are more fluid – add additional detail after the first year of implementation*

- **Expand programs and partnerships**
  - Measurements of success: continue expansion implementation from year 1+2 (expand counseling center and housing + employment partnerships) | solid partner relationships to maintain | formal partnership review process | ongoing technology review and investment to support growth
- **Stabilize building services**
  - Measurements of success: begin to show profit | services to funding are right-sized
- **Implement office location strategy**
  - Measurements of success: decision made | clear pathway for location and space utilization
- **Known/ brand awareness**
  - Measurements of success: staff at events and recognized | master events list to maximize | awareness in community – referrals coming in | board involved and promoting Tasks awareness | lessons learned applied from year 1 marketing plan implementation | potential partners proactively reaching out
- **Continue expansion of fundraising**
  - Measurements of success: continue progress from year 1+2 activities | apply lessons learned for integration in future | increase what comes in vs. spend (50%) | increase funds to support expansion | continued increase in donations | board involvement

## Barriers to Success + Ways to Manage

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*Below are the biggest barriers to implementation and ideas to manage these barriers for the best results*

Barrier	Ways to Manage
Funding and shifting priorities	Stay highly engaged in community and continue to share information well
Legislation Response rate/time from State and Feds	Continue engagement and testify at capital
Transition/ leadership change	Expect change Maximize participation in the change Preserve mission/ values Maintain client focus and Fairweather model
Board participation	Review expectations Clarify role and participation



## Appendix A: ACRONYMS related to TASKS UNLIMITED, Inc

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ACT – Assertive Community Treatment

ARMHS –Adult Rehabilitative Mental Health Services

CADI WAIVER – Community Access for Disability Inclusion

CARF – Commission on Accreditation of Rehabilitation Facilities

CCL – Coalition for Community Living (National Fairweather Org.)

CRP – Community Rehab. Program

DEED –Department of Employment and Economic Development

DHS – Department of Human Services

EE Rule –Extended Employment

E-Team – Executive Team of staff (dept. Heads from all departments)

EXECUTIVE COMMITTEE – Board officers and Chairs from subsidiary Boards at Tasks

HSASMI – Housing Supports for Adults with Serious Mental Illness

HSB/JJC – Health Services Building/Juvenile Justice Center (one of our contracts)

IRTS –Intensive Residential Treatment Services (licensing)

JTP - Jobs Training Program

LTP – Lodge Training Program (same as TUTC)

MOHR – MN Organization of Habilitation and Rehabilitation (Statewide Org. for CRP's)

TCM – Targeted Case Management

TUMHS – Tasks Unlimited Mental Health Services

TUBS – Tasks Unlimited Building Services

TUI – Tasks Unlimited Inc.

TUL –Tasks Unlimited Lodges

TUTC (LTP - Lodge Training Program) – Tasks Unlimited Training Center

VRS – Vocational Rehabilitation Services