The cover features a dark blue central rectangle with white and yellow text. The background is a collage of light blue and teal geometric shapes, including circles and triangles. The word 'Lifeworks' is written in a white serif font at the top. Below it is a white horizontal line. The year '2022' is in a yellow sans-serif font. The words 'ANNUAL REPORT' are in a large, bold, yellow serif font. Below that is another white horizontal line. At the bottom, a white paragraph describes the organization's mission.

*Lifeworks*

2022

**ANNUAL  
REPORT**

Lifeworks partners with people with disabilities to drive change by increasing opportunity and access in the community.

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## Dear Lifeworks Community,

The 2022 Lifeworks Annual Report provides insight into who we are and our impact across Minnesota. With support and feedback from our community, Lifeworks continues to deliver high-quality services that honor choice and break down barriers to inclusion.

In July 2022, we refreshed the Lifeworks mission and vision as part of our 2022 – 2025 Strategic Plan. Our vision and mission emphasize accessibility, partnership, and community. They are rooted in the concept of change we want to build together. Our new vision and mission reinvigorate our core work.

In total, we partnered with 3,001 people with disabilities and their families in 2022, with 736 people receiving career support, 169 people connecting with their communities through Day Support, and 2,051 Minnesotans self-directing their care with Lifeworks. We partnered with 45 people with disabilities in Resource Navigation, supporting them in gaining the tools to take the next step.

Lifeworks leaned into our value of “You Lead – We Listen” by embracing a community-based model for our Day Support program in Brooklyn Park. We heard that 84% of our current clients at that facility most enjoy activities in the community, so we are centering their voices and experiences and took the first steps to ingrain our services into the fabric of our communities.

We also began focusing on co-creating culturally specific programs with Black, Indigenous, People of Color, and rural communities – bringing us closer to our vision of accessible, equitable, and diverse communities. Lifeworks is excited to be a partner to historically underserved communities so that together we can increase opportunity and access for all.

Lifeworks is confidently moving forward into the new year with our learnings and success from 2022. Thank you for your continued support of Lifeworks and for investing in a more inclusive community.



Gertrude Matemba-Mutasa  
President and CEO



John Abbott  
Board Chair



# We Focus on Impact

## Our Values

### You Lead the Way – We Listen

We honor choice and pursue opportunities with community at the heart of our work.

### Together, We Break Down Barriers

We seek diverse perspectives, advance accessibility, and encourage a sense of belonging for all.

### We Focus on Impact

We hold ourselves to the highest standards. We share expertise and collaborate to find solutions that address the whole picture.

### We Reinvent

### What's Possible

We take chances and welcome the unknown. We learn from the past and lean into the future.

**Lifework has really taught me to be independent, self-sufficient, and to be my own advocate. They welcomed me with open arms and helped me find an opportunity to work independently. I know Lifeworks will always be there for me.**

**– Kristina  
Lifeworks Employment Client**

In 2022, Lifeworks partnered with 3,001 people with disabilities and their families across Minnesota. In our annual survey, 94% of our partners said they feel like Lifeworks meets their needs.

# 2022 by the numbers



**3,001**  
people served across all Lifeworks programs



**2,051**  
served in Self-Directed Services



**736**  
people served through Employment Services



**169**  
people served in Day Support Services



**45**  
people served in Resource Navigation



**323**  
employers, hiring people supported by Lifeworks



**66**  
new employers



**4,183**  
fiscal employees providing  
**3,354,354**  
hours of care



**58**  
number of years Lifeworks has provided services

## Self-Directed Services

Lifeworks supported 2,051 individuals with self-directing their services in 2022. As an approved Financial Management Services provider through the State of Minnesota, Lifeworks processes services for people enrolled in the Consumer Directed Community Supports and Consumer Support Grant programs.

Lifeworks also serves as a PCA Choice and as an in-home licensed provider of Individualized Home Supports and Night Supervision.

## Employment

Lifeworks is driven by the belief that all people can work and have a meaningful impact in their community. For 36 years, Lifeworks has worked to create a more diverse and inclusive workforce in Minnesota. We connect people to experiences that explore their interests, develop skills, and start or advance their careers.

In 2022, Lifeworks served 736 people in employment services. We supported 142 individuals in finding and starting new jobs – with 89% of those hired directly by the business. And we welcomed 66 new employers throughout the year who are committed to breaking down barriers to employment for people with disabilities.

## Day Support

Lifeworks supported 169 people in Day Support Services in 2022 as they connected with their communities, engaged with their peers, and accessed technology. With the people we serve leading the way, we offered opportunities to build self-reliance, including: creative arts, career exploration, music therapy, skill building in the community, self-advocacy development, technology labs, multi-sensory environments, and so much more.

In 2022, Lifeworks partnered with 45 people with disabilities in Resource Navigation. This service is designed to help people with disabilities gain the tools to take the next step. With individuals leading the way, we assist them in exploring possibilities and building connections with the resources that align with their goals.



**Our mission** is to partner with people with disabilities to drive change by increasing opportunity and access in the community.

**We envision** accessible, equitable, and diverse communities.

# 2022-2025 STRATEGIC PLAN

## VISION

Accessible, equitable, and diverse communities.

## MISSION

Lifeworks partners with people with disabilities to drive change by increasing opportunity and access in the community.

## VALUES



### You Lead the Way - We Listen

We honor choice and pursue opportunities with community at the heart of our work.



### Together, We Break Down Barriers

We seek diverse perspectives, advance accessibility, and encourage a sense of belonging for all.



### We Focus on Impact

We hold ourselves to the highest standards. We share expertise and collaborate to find solutions that address the whole picture.



### We Reinvent What's Possible

We take chances and welcome the unknown.  
We learn from the past and lean into the future.

## EQUITY STATEMENT

Lifeworks strives to be radically accessible, diverse, equitable, and inclusive. We appreciate the vibrancy of differences, center the voices of silenced and marginalized people, and champion universal rights.

## STRATEGIC PILLARS & PRIORITIES

Pilot new initiatives that expand self-determination	Grow core programs and services	Create an employee culture centered on accessibility, diversity, equity, and inclusion	Co-create culturally specific programs with rural communities and Black, Indigenous, and people of color (BIPOC)
Launch resource navigation	Accelerate growth via geographic expansion of Fiscal Services	Hire a Director of Diversity, Equity, Inclusion, and Accessibility	Identify and build relationships with culturally specific partners
Explore behavioral health therapeutic services	Retain Personal Care Assistance (PCA) customers by converting to Individualized home supports (IHS), Community First Services and Supports (CFSS) budget model, or consultation services	Strengthen recruitment and retention strategies for a diverse workforce	Co-create models that customize Lifeworks' offerings to rural communities and Black, Indigenous, and people of color (BIPOC)
Develop disability inclusion products centered around disability rights, self-direction, and employer education	Optimize staff capacity and operations to achieve sustainable growth of employment services	Establish our flexible-hybrid work model	Strengthen relationships with state divisions, departments, and lead agencies to secure resources and impact public policy
Explore sustainable funding models for Apple Valley building	Expand remote services	Streamline user experience for prospective and current employees by implementing a modern Human Resources Information System (HRIS)	

# 2022 FINANCIALS

## STATEMENT OF FINANCIAL POSITION

Year Ended December 31	2022	2021
<b>ASSETS</b>		
Cash and Investments	\$29,282,227	\$31,927,250
Accounts Receivable and other	7,387,044	6,945,001
Property and equipment net of accumulated depreciation	4,681,718	3,287,392

<b>Total Assets</b>	<b>\$41,350,989</b>	<b>\$42,159,643</b>
---------------------	---------------------	---------------------

### LIABILITIES AND NET ASSETS

#### Liabilities

Debt Maturities	\$1,168,186	\$1,353,632
Accounts Payable	257,426	269,525
Accrued Salaries and related expenses	6,035,111	5,366,754
Other Accrued Expenses	209,092	161,279
Other Liabilities	1,023,984	369,557
<b>Total Liabilities</b>	<b>\$8,693,799</b>	<b>\$7,520,747</b>

#### Net Assets

##### Without Donor Restrictions

Total Designated Net Assets	\$3,151,219	\$1,933,760
Total Board-Designated Net Assets	24,299,758	26,592,400
Total Undesignated Net Assets	5,166,213	6,085,436
<b>Total Net Assets Without Donor Restrictions</b>	<b>\$32,617,190</b>	<b>\$34,611,596</b>

##### With Donor Restrictions

<b>Total Net Assets</b>	<b>\$32,657,190</b>	<b>\$34,638,896</b>
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<b>Total Liabilities and Net Assets</b>	<b>\$41,350,989</b>	<b>\$42,159,643</b>
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## STATEMENT OF ACTIVITIES

Year Ended December 31	2022	2021
<b>SUPPORT AND REVENUE</b>		
Self-Directed Services	\$79,078,304	\$71,496,371
Employment and Day Support Services	9,302,284	8,209,303
Contributions and Grants	1,679,237	2,078,755
Other	(679)	3,472
<b>Total Support and Revenue</b>	<b>\$90,059,146</b>	<b>\$81,787,901</b>

### EXPENSES

Self-Directed Services	\$71,834,360	\$64,187,217
Employment and Day Support Services	9,979,298	9,684,518
Administration	7,468,204	6,223,422
Development	499,076	365,224

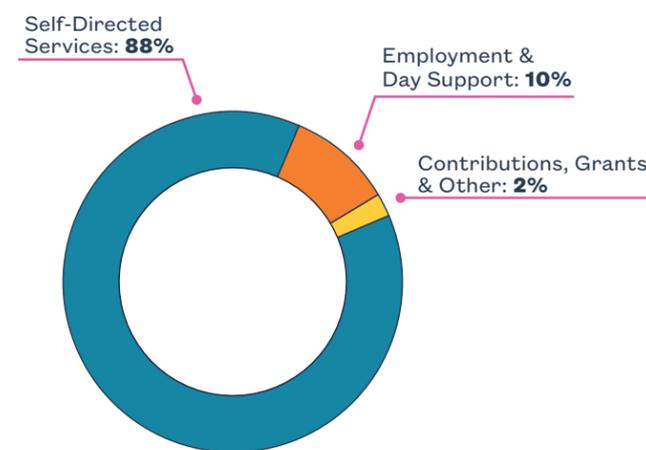
<b>Total Expenses</b>	<b>\$89,780,938</b>	<b>\$80,460,381</b>
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<b>Net Operating Income</b>	<b>\$278,208</b>	<b>\$1,327,520</b>
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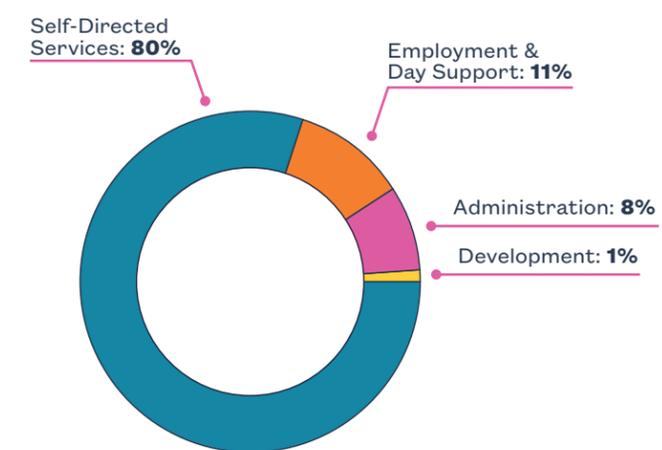
<b>Change in Investments Value</b>	<b>(2,259,914)</b>	<b>3,733,169</b>
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<b>Change in Net Assets</b>	<b>(\$1,981,706)</b>	<b>\$5,060,689</b>
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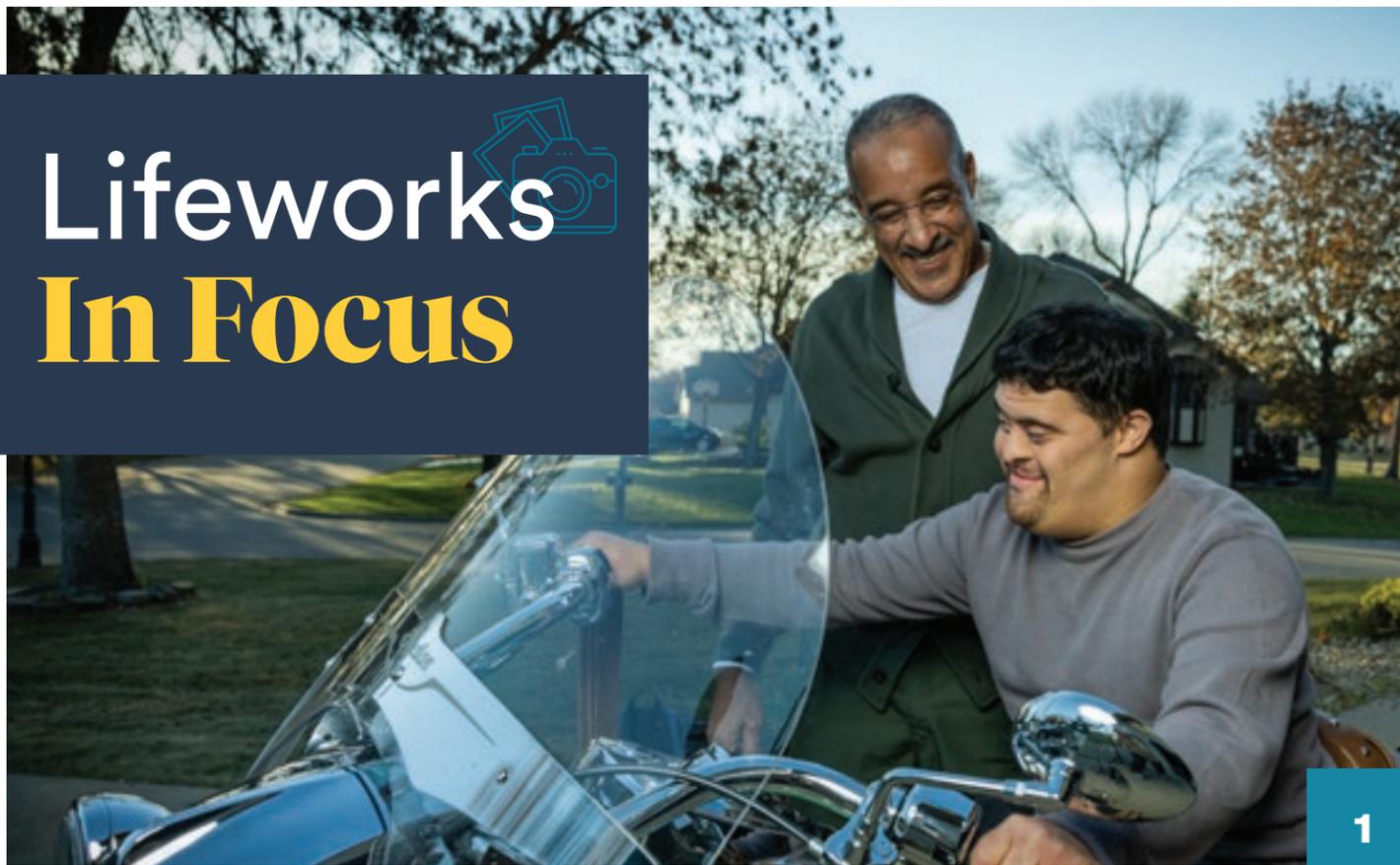
### REVENUE 2022



### EXPENSES 2022



# Lifeworks In Focus



1. Raaj and Justin, self-directed clients, share their love of motorcycles.
2. Muna Mohamed, Director of Diversity and Inclusion, and Michelle Hanrahan, HR Manager, at the new Lifeworks Main Office.
3. Current President and CEO, Gertrude Matemba-Mutasa, with former President and CEO, Judy Lysne, at our Open House event.
4. Theo, an Apple Valley client, providing the rhythm for the winter concert.
5. Noe, a Brooklyn Park client, poses for a selfie at the Como Park Zoo.
6. Folks from Blue Cross Blue Shield Minnesota, including board member Bukata Hayes, enjoying the Lifeworks Annual Celebration.
7. Rachel, a Brooklyn Park client, singing a solo at the winter concert.
8. Clients at our Apple Valley Day center celebrating Halloween.
9. Mirjana, Lifeworks client, employed at Bayer.





# Diversity and Inclusion at Lifeworks.

BY MUNA MOHAMED



My name is Muna Mohamed, and I am the Director of Diversity and Inclusion at Lifeworks. I am excited to work with the Lifeworks team, the people we partner with, and the broader Lifeworks community to find creative, intentional ways to move the needle forward and make our vision of accessible, equitable, and diverse communities a reality.

I am joining Lifeworks from an organizational development consultancy, where I supported clients in strategizing and maximizing their diversity, equity, and inclusion efforts. I have a

Master's in Management with an emphasis on Organizational Diversity and Inclusion Leadership from the University of Dubuque and a Bachelor's in International Relations with a double minor in Political Science and Communication Studies from Minnesota State University, Mankato.

My passion for diversity, equity, and inclusion stems from first-hand experience of being discriminated against and knowing how that feels. I want to do everything possible to create communities where everyone

feels like they belong and can access the services and opportunities they need to succeed.

As Director of Diversity and Inclusion at Lifeworks, I lead and implement proactive and progressive diversity, equity, inclusion, and access initiatives that will impact our communities, inspire others to follow suit, and weave DEIA into the fabric of the organization as a strategic priority.

At Lifeworks, we lean on our guiding compass and equity statement to support our work and align our values, mission, and DEIA goals.

## LIFEWORKS DEIA GUIDING COMPASS

- ◆ Acknowledge that ignorance, discrimination, stigma, and prejudice exist.
- ◆ Believe every person deserves dignity and respect from the people we serve to our employees, community partners, and beyond.
- ◆ Commit to cultivating a culture that embraces difficult conversations and challenges barriers to an equitable and inclusive workplace.
- ◆ Dedicate resources to increase our knowledge and awareness and to challenge ourselves to understand our thoughts, feelings, and actions.
- ◆ Ensure that diversity, equity, inclusion, and accessibility are embedded into our policies and practices.

## LIFEWORKS EQUITY STATEMENT

Lifeworks strives to be radically accessible, diverse, equitable, and inclusive. We appreciate the vibrancy of differences, center the voices of silenced and marginalized people, and champion universal rights.

We welcome change and work to reverse historic oppression. We promise to educate ourselves to end the dominant cultural

practices of White supremacy, ableism, racism, sexism, homophobia, transphobia, xenophobia, anti-Indigenous practices, religious oppression, and all other obstacles to personal authenticity and achievement. We support our partners and members of our community who are marginalized to restore justice and dignity.

At Lifeworks, we expect accountability from all employees and our Board of Directors. We know that we cannot be truly person-centered unless we celebrate all identities – emphasizing authenticity over conformity.

At Lifeworks, we partner with complete human beings with intersectional identities, recognizing that disability exists in every race, religion, gender, culture, and class and that most of us will experience disability at some point in our lives. We recognize we have made mistakes and will continue to evolve with humility and openness, placing psychological safety, equity, and belonging over comfort. Lifeworks recognizes that in the best interests of our community, we must approach disability through the lens of diverse perspectives.

We call upon our diverse community to hold us accountable.



# CONTRIBUTORS

Thank you to the following businesses, foundations, community partners, and individuals who made contributions to Lifeworks in 2022. It is because of your investment that we can fund the innovative and progressive programs that Lifeworks offers in partnership with people with disabilities.

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American Durable, Inc.  
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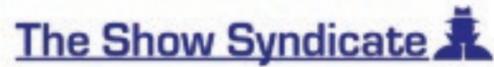


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