About Tri-Valley

Established in 1976, Tri-Valley, Inc. is a private, non-profit agency providing information, referrals, and care management for in-home and community services in Central Massachusetts. Tri-Valley is committed to the rights of elders and individuals with disabilities to live independently with dignity and safety in a setting of their choice. The policies of the Agency are determined and its activities monitored by an active volunteer Board of Directors. The Agency is administered by an Executive Director and a salaried staff assisted by over 800 volunteers.

Mission Statement

The Mission of Tri-Valley is to promote and maintain an optimal level of independence, dignity and well-being for elders and individuals with disabilities by providing information, advocacy and access to quality services and resources, as well as caregiver support.

Service Area

Also, (shaded area) Adult Family Care & Personal Care Attendant in: Auburn, Barre, Boylston, Grafton, Hardwick, Holden, Holliast, Hopkinton, Leicester, Marlboro, Millbury, New Braintree, Northboro, Oakham, Paxton, Rutland, Shrewsbury, Westboro, West Boylston & Worcester
We are grateful for the service of each Volunteer and apologize for any errors or omissions.
Growth in many areas of our agency work has been the theme in our 38th year. We grew in Charlotte Hougasian, Dorothy Ireland, Gloria Latino, Delphis Levia, Marsha Murray, Janis Puziak, Marie Rebecchi, Margaret Stevens, Diane Swanson, Carol Walker, Deborah Yeaman.

COMMUNITY SUPPORT SERVICES — Companion & Friendly Visitor: Peggy Burgo, Nancy Connell, Kristi Cromwell, Robin Deaver, Betty Ann Gaudry, Autumn Howe, Barbara LeBel, Janet LaBrie, Daniel Reinhard, Andrea Trifone


OMBSDSMAN — Marie Baker, Aimee Bel Air, Patricia Corson, Lonnie Curran, Margaret Ellis, Susan Fahey, Joye Frias, Beverly Gravison, Alice Hunt, Marie Landry, Robert Leary, Deborah Meredith, Nancy Ollis, Lisa Sonntag, Cheryl Tingley, Joyce Waters

Charlie Hougasian, Dorothy Ireland, Gloria Latino, Delphis Levia, Marsha Murray, Janis Puziak, Marie Rebecchi, Margaret Stevens, Diane Swanson, Carol Walker, Deborah Yeaman.

COMMUNITY SUPPORT SERVICES — Companion & Friendly Visitor: Peggy Burgo, Nancy Connell, Kristi Cromwell, Robin Deaver, Betty Ann Gaudry, Autumn Howe, Barbara LeBel, Janet LaBrie, Daniel Reinhard, Andrea Trifone


Our ADRC (Aging & Disability Resource Center) collaborations with The Center for Living and Working, Central Mass Agency on Aging, Elder Services of Worcester Area, and Montachusett Home Care continue to be strong. The “no wrong door” approach is a strength to each of our agencies and the wonderful options counselling opportunities are greatly appreciated by both individuals and their caregiver families.

Our Care Transitions™ work with the Milford Regional Medical Center to reduce unnecessary hospitalizations and readmissions through the CHART program has been both successful. Additionally, our collaborations with BayPath Elder Services, Elder Services of Worcester Area, and Montachusett Home Care on the Central Mass/MetroWest Transitions in Care Collaborative with UMass Memorial Medical Center (University, Memorial and Wing Hospitals) and Tenet Health Systems (St. Vincent, Framingham Union and Leonard Morse Hospitals) has ranked this program among the top performers in the country.

All of this new work has resulted in more projects, more responsibilities and more staff. As a result we have grown and added a new administrative office which is an opportunity to extend our services to more people so that every person can choose to live with dignity in their setting of choice.
Services in Your Home and Community

Tri-Valley’s Information and Resource (I&R) department is your gateway to information and services. Trained I&R Specialists provide free information about a wide range of services and programs. With a large database at their disposal, our I&R, AIRS certified Specialists will help identify the services that are needed and guide the caller to the appropriate resources. The I&R database contains thousands of local, state and national resources including, but not limited to: home care, housing options, nutrition, respite care, fuel assistance, dementia care services, health insurance, benefits and caregiver support. I&R Specialists are available to answer your questions and help guide you to whatever you need, whether it’s help at home or finding a service for yourself or another in the community. During Fiscal Year 2013, the department responded to 8,326 information and referral calls. Tri-Valley’s I&R Department is a member of the Alliance of Information and Referral Systems, Inc. (AIRS), a national professional organization committed to improving access to services for all people.

State Home Care (SHC) Program Care Managers complete in-home assessments and develop and manage care plans for elders that promote independent living. Registered nurses conduct Clinical Assessment & Evaluation (CAE) screenings to determine eligibility for nursing home care or adult day health. Three Senior Care Organizations (SCO), Navicare, United and Senior Whole Health and three One Care organizations, Commonwealth Care Alliance, Fallon Total Care and Unify are part of the Tri-Valley family. Our Geriatric Services Support Coordinators assess the need and manage in-home services for these members.

Chapter 604 of the Commonwealth of Massachusetts Laws provides for the mandated reporting of abuse, neglect and financial exploitation of elders. Tri-Valley is a designated Protective Services Agency and also has a Crisis Intervention Program.

The Family Caregiver Support Program provides information, education, and support services to assist caregivers in managing the challenges of caring for an elderly parent, relative or friend.

The Community-based Care Transitions (CCTP) programs provide a transition coach to newly discharged hospital and rehab patients to assist with self management and recovery at home, using the evidence based Care Transitions Intervention (CTI) Model. The Care Transition program also contracts with Milford Regional Medical Center (MRMC) for CTI services.

Memorial & Tribute Donations

- Donations in Memory of -


- Donations in Honor of -

All Volunteers, Sadie Kaufman, Rocky, Evelyn Saucier, Al & The Gang at the Upton Meal Site

Tri-Valley welcomes memorial and tribute donations in any amount.

Special Thanks on Behalf of our Clients

WEBSTER MANOR FOR THANKSGIVING BASKETS
THE CORNERSTONE QUILTERS FOR BEAUTIFUL LAPROBES
TERRAZZA’S FOR THEIR GIVING TREE PROJECT

Tri-Valley Staff ready to distribute Thanksgiving Baskets from Webster Manor.

Annual Report Design/Production credits to Barbara O’Brien with assistance from Diane Mathurin.
General Donations

($200 - $499)

($100 - $199)

(Up to $99.00)

We are grateful for all donations and apologize for any errors or omissions.

Services (continued)

The Ombudsm program provides advocacy for residents of long term care facilities and works to improve their quality of life and care. Through regular visits, Ombudsmen investigate and resolve complaints by residents and help family members with information.

The Adult Family Care (AFC) Program provides family living to elders and adults as an alternative to institutional care. Participants are carefully screened and matched with caregivers who provide 24-hour support in their homes.

The Personal Care Attendant (PCA) Program is consumer directed wherein the individual selects, trains and employs his or her caregiver with training and support from the Tri-Valley PCA staff.

The Nutrition Program provides meals-on-wheels to home-bound elders and congregation meals at ten Community Dining Centers and ten Senior Lunch Clubs with help from hundreds of dedicated volunteers.

Volunteers, through our Community Support Services Program, provide Companion, Friendly Visitor and Money management services.

The Alzheimer’s Support Network of South Central Mass Inc. provides supportive services to caregivers of persons with dementia, through in-kind use of the Tri-Valley office. ASN offers helpline assistance, caregiver support groups, respite assistance and volunteer opportunities.
Foundation & Major Donor Support
Fiscal Year 2013 (July 1, 2013 — June 30, 2014)

($30,000)
George W. Wells Foundation, Bank of America, N.A., Trustee

($10,000)
John J. & Elizabeth M. Kunkel & Family Foundation, Inc.

($5,000 - $9,999)
Greater Worcester Community Foundation—Lorraine Crepeau Fund
Massachusetts Bankers Association
Savers Bank
United Way of Southbridge, Sturbridge & Charlton, Inc.
United Way of Webster & Dudley, Inc.
Webster Five Foundation

The Massachusetts Bankers Association presented $5,000 to Tri-Valley’s Money Management Program. Spencer Bank nominated Tri-Valley for the award. Pictured from Tri-Valley are: Jayne Cacciapuoti, Community Support Services Director, Brian Perry, Treasurer Board of Directors and Marilyn Travinski, Executive Director along with members of the Massachusetts Bankers Association.

($1,000 - $4,999)
Customers of Terrazza, David Gagnon,
Meals on Wheels Association of America, Katharine C. Pierce Trust,
Spencer BANK, Worcester County Food Bank Fund to End Hunger

($500 - $999)
Raymond & Jeanette Bussohari, Community Partners for Health (CHNA 6),
Dudley Nutrition Site, Patrick & Pauline Giovanni, IPG Photonics Corporation,
John & Ellen Rockwell, Resident Council and Employees of
Southbridge Rehabilitation & Health Care Center, Southbridge Savings Bank,
Mary Lou Staples, Sutton Nutrition Site, Marilyn L. Travinski,
Webster First Federal Credit Union Employees

Sources of Revenue
Fiscal Year 2014 (July 1, 2013—June 30, 2014) Unaudited

<table>
<thead>
<tr>
<th>Source</th>
<th>Revenue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Office of Elder Affairs</td>
<td>$10,265,780</td>
<td>48.26%</td>
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<tr>
<td>Medicaid</td>
<td>$5,936,873</td>
<td>27.91%</td>
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<tr>
<td>Private Contracts</td>
<td>$3,289,168</td>
<td>15.43%</td>
</tr>
<tr>
<td>Project Income and Client Fees</td>
<td>$716,123</td>
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<tr>
<td>Central Mass Agency on Aging</td>
<td>$702,245</td>
<td>3.30%</td>
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<tr>
<td>Fundraising and Donations</td>
<td>$150,632</td>
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<td>Grants and Appropriations</td>
<td>$118,638</td>
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<tr>
<td>Commodity Foods - NSIP</td>
<td>$85,087</td>
<td>0.40%</td>
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<tr>
<td>Interest and Investment</td>
<td>$11,902</td>
<td>0.06%</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$21,276,448</strong></td>
<td><strong>100.00%</strong></td>
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Only 5.02% of revenue went to the administration of Tri-Valley.

Tri-Valley, Inc., a private, non-profit agency, receives funding from the Commonwealth of Massachusetts through the Executive Office of Elder Affairs and Federal financial support under the Older Americans Act furnished by the Central Mass Agency on Aging and the Massachusetts Executive Office of Elder Affairs. Funds are also received from public and private sources.