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, Holliston, Hopkinton, Leicester, Marlboro, Millbury, New Braintree, Northerboro, Oakham, Paxton, Rutland, Shrewsbury, Westboro, West Boylston & Worcester

TRI-VALLEY, INC. 10 Mill Street • Dudley, MA 01571 • TEL 508-949-6640 • 1-800-286-6640
TDD 508-949-6654 • FAX 508-949-6651 • E-MAIL info@tves.org • WEBSITE www.trivalleyinc.org

39 Years of Giving People
DIGNITY • INDEPENDENCE • CHOICE

“Home With You” expresses our commitment to be with you through the challenges created by aging, living with a disability or being a caregiver. Call us when you or someone you care for needs help.
Amanda Starr, Gertrude Suter, Patricia Sweet, Bruce Terry, James Violetta, Susan Wilcox *Sturbridge Site: Mary Ann Armstrong, Carole Beausoleil, Steven Berkeley, Therese Caplette, Phil Carlson, Christian Castendy, Patricia Colburn, Rosalba Crotty, Christine Coughlan, Cora Daff, Lynn Durocher, Alison Garret, Sue Gismondi, Loretta Herter, John Keizer, Kathy Knauer, Robert Knight, Rachel Lavallee, Cecile Lepain, Curtis Litchfield, Charlotte Lloyd, Marcia Loranger, Olivia O'Donnell, Janis Puziak, Lorette Richer, Tammy Rispel, John Roderick, Pauline Roderick, Cindy Shermertorlh, Robert Sparrow, Michael Splaine, Suzanne Sproesser, Judith Stevens, Pauline Walsh, Susan Zeh

Mary Ann Tri-Valley, Inc. Board of Directors

Keizer, Kathy Knauer, Robert Knight, Rachel Lavallee, Marcia Loranger, Olive O'Donnell, Janis Puziak, Lorette Richer, Tammy Rispel, John Roderick, Pauline Roderick, Cindy Shermertorlh, Robert Sparrow, Michael Splaine, Suzanne Sproesser, Judith Stevens, Pauline Walsh, Susan Zeh

*Sturbridge Site: Mary Ann Armstrong, Carole Beausoleil, Steven Berkeley, Therese Caplette, Phil Carlson, Christian Castendy, Patricia Colburn, Rosalba Crotty, Christine Coughlan, Cora Daff, Lynn Durocher, Alison Garret, Sue Gismondi, Loretta Herter, John Keizer, Kathy Knauer, Robert Knight, Rachel Lavallee, Cecile Lepain, Curtis Litchfield, Charlotte Lloyd, Marcia Loranger, Olivia O'Donnell, Janis Puziak, Lorette Richer, Tammy Rispel, John Roderick, Pauline Roderick, Cindy Shermertorlh, Robert Sparrow, Michael Splaine, Suzanne Sproesser, Judith Stevens, Pauline Walsh, Susan Zeh


Webster Lunch Club: Pieter Boersman, Edward Brown, John Gogolinski, Nancy L. Bradley, Mendon Board of Directors

Theodore A. Bartlett, Southbridge

1st Vice President: Barbara A. Clancy, Brookfield

2nd Vice President: Thomas J. Cullen, Uxbridge

Past President: Mary Lou Staples, Medway

Directors

Audrey Bacon, Dudley

Lucy Beeman, Brookfield

Nancy L. Bradley, Mendon

Barbara A. Clancy, Brookfield

Theodore A. Bartlett, Southbridge

Mary A. Falardeau, Brookfield

Irene M. Garand, Sturbridge

Harold D. Gould, Jr., Esq., Whitinsville

Ruth King, Spencer

Evelyn A. Petrelli, Southbridge

This Annual Report is dedicated in memory of Audrey Bacon for her many years of dedication and service to Tri-Valley, Inc. as an officer and member of the Board of Directors.

* Left during the year

On the Annual Report cover, Jean is very pleased to receive her home-delivered meal from John.
Message from the President & Executive Director

Over 800 Volunteers Support our Mission in their Communities!

services in your home and community

trivi-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 2015, the department responded to 5,205 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 aging and disability resource consortium (ADRC) is a national model developed and supported by the administration of community living and centers for medicare and medicare services. tri-Valley, Inc. is a member of the ADRC of central Massachusetts and has options counselors who provide a free service to all individuals who need access to information around decision support, information and referral services, service planning, consumer-directed options regarding their choices for long term services and supports and community integration.

memorial & tribute donations

- donations in memory of -

the acharya & bhachech families, shirley barnes’ loved ones, alice belanger, pearl bellerive, ruth chiasson, virginia chiuchiolo, linda cote, maureen o’Brien cullen, irene ethier, charles fiske, elizabeth flamand, james mccreadie fulton, marie paule garceau, patrick giovanni, eva t. grigas, aubrey hensel, dorothy & eugene ireland, tom & john jedrzenski, ernest johnson, jennifer williams johnson, john l. lapomardo, charles majka, robyn marcin, sophie & vinnie marsella, kathryn metro, dan morrill, thomas & rose o’connell, ken prue, palma rabidou, Mrs. brenda rigney, mary & clifford rivet, cecelia rogers, james small, john & sylvia thompson, frederick J. & margaret C. tingley, Helen & joseph tondorf, lois tracy, quinto J. trifone, lionel vincent, theresa travinski wallace

- donations in honor of -

Harold Anderson, James E. Clark, William Danis, Rena Fiske, George Giguere, Susan Koziak, Meals-on-Wheels Volunteers, Kathryn Metro, Honey Meyer, Gerrie Morrill, Lorraine Benjamin Palmerino, Bonnie & Frank plankey, rocky, aldina vicario

special thanks on behalf of our clients

webster Manor for thanksgiving baskets

the cornerstone quilters of charlton, for beautiful laprobes

terrazza’s of franklin, for their giving tree project

Beautiful laprobes for clients were provided by the Cornerstone Quilters.
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 Ombudsman 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 good nutritious meals for people at home and in the community.

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 Nutrition Program provides Meals on Wheels to home-bound elders and congregate 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 Nutrition Program provides Meals on Wheels served to 54,675 people, Meals-on-Wheels served to 243,976 people. Congregate Meals Served: 3,125,766, Meals-on-Wheels Served: 243,976.

The Ombudsman 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 good nutritious meals for people at home and in the community.

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.

Tri-Valley provides in-kind office support to the Alzheimer’s Support Network (ASN) of South Central Mass Inc. ASN provides supportive services to caregivers of persons with dementia.
Foundation & Major Donor Support
Fiscal Year 2015 (July 1, 2014 — June 30, 2015)

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

($10,000)
Health Foundation of Central Massachusetts’ Marilyn E. Plue Director Recognition Award
designated by Brian J. Perry
John J. & Elizabeth M. Kunkel & Family Foundation, Inc.

($5,000 - $9,999)
Meals on Wheels America
Katharine C. Pierce Trust
United Way of Southbridge, Sturbridge & Charlton, Inc.
United Way of Webster & Dudley, Inc.
Webster Five Foundation

Sources of Revenue
Fiscal Year 2015 (July 1, 2014—June 30, 2015) Unaudited

<table>
<thead>
<tr>
<th>Source</th>
<th>Revenue</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Office of Elder Affairs</td>
<td>$10,678,570</td>
<td>47.17%</td>
</tr>
<tr>
<td>Medicaid</td>
<td>$6,116,903</td>
<td>27.02%</td>
</tr>
<tr>
<td>Private Contracts</td>
<td>$4,151,760</td>
<td>18.34%</td>
</tr>
<tr>
<td>Project Income and Client Fees</td>
<td>$674,489</td>
<td>2.98%</td>
</tr>
<tr>
<td>Central Mass Agency on Aging</td>
<td>$564,859</td>
<td>2.50%</td>
</tr>
<tr>
<td>Grants and Appropriations</td>
<td>$172,245</td>
<td>0.76%</td>
</tr>
<tr>
<td>Fundraising and Donations</td>
<td>$169,254</td>
<td>0.75%</td>
</tr>
<tr>
<td>Commodity Foods - NSIP</td>
<td>$105,639</td>
<td>0.47%</td>
</tr>
<tr>
<td>Interest and Investment</td>
<td>$2,382</td>
<td>0.01%</td>
</tr>
<tr>
<td>Total</td>
<td>$22,636,101</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

*Only 5.02% of revenue went to the administration of Tri-Valley.*

Staffing
As of the end of Fiscal Year 2015, Tri-Valley had 105 full-time employees and 94 part-time employees for a total of 169 staff members.

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.

Members of the Uxbridge Rotary Club presented $1,000 to Tri-Valley’s Nutrition Program to kick-off the annual March for Meals event.

($1,000 - $4,999)
Banfield Charitable Trust, Customers of Terrazza, Gary Danis, Uxbridge Rotary Club, Gerald & Marilyn Fels

($500 - $999)
Kalpana & Ravindra Acharya, Community Partners for Health (CHNA 6), Mary Falardeau, Pauline Giovanni, Lynn Harris, Northbridge Nutrition Site, Mary Lou Staples, Marilyn Travinski, Church World Service Milford, MA CROP Hunger Walk

Only 5.02% of revenue went to the administration of Tri-Valley.