Tri-Valley
Annual Report
2012

36 Years of Giving People

DIGNITY INDEPENDENCE CHOICE

Serving people with disabilities, adults over the age of 60 and caregivers.
In Memoriam

The 2012 Annual Report is dedicated in memory of

Grace M. Kirk

Grace actively served on the Board of Directors for 17 years. Dedicated, knowledgeable, and always willing to volunteer her time, she carried out leadership roles as an Officer, Committee Chairperson for Membership, and as a member of numerous other committees of the Board. She was honored by her fellow Board Members in 2001 as their choice for the Outstanding Board Services Award.

We miss her gracious warmth, friendly gentle manner and dedicated work. We remember her as always kind and considerate of everyone with whom she came in contact.

We are grateful for her many years of service and we extend our sympathy to her family and many friends.

On the cover, top left clockwise, clients Louise, John, Irene, Charlie and her mom Katie, and Meals on Wheels driver Mike delivering a noontime meal to Violet.
In our 36th fiscal year, all Tri-Valley staff members found themselves busier than ever before as our agency worked hard to respond to greater need and new programmatic opportunities with fewer resources. We grew dramatically in the Adult Family Care Program and the Personal Care Attendant Program. The Senior Care Organization contracts with Navicare, Senior Whole Health and United also grew. The institution of state-mandated waitlists caused a decline in State Home Care clients and also caused a drop in the number of meals while the cost of meals continued to escalate.

The work in Care Transitions increased with the pilot programs for hospital discharge patients in Central Massachusetts and our work with Caregivers, Options Counseling and seniors in Protective and Crisis situations grew as well. We continued to expand our classes in Chronic Disease Self-Management Education as well as Matter of Balance and Healthy Eating.

We were surprised and grateful when The Cohasse Country Club in Southbridge announced that Tri-Valley would be the recipient of their annual charity tournament in 2012. We also benefitted from a fundraising dinner at the Publick House in Sturbridge.

We continued to grow our food distribution programs for our clients and their pets as well. Our 17th Winter Food Project experienced a 50% increase in need. Staff members worked to provide needy seniors as well as younger disabled clients food for the winter months. The Cornerstone Quilters provided us with beautiful laprobes which were distributed and enjoyed by many people.

Among our Board members, Vice President Josephine Veglia, Esq., was honored as outstanding Board member for FY 2012. Past Board President Irene Garand was honored at the State House for her 17 years of service as a Money Management Advisory Board Volunteer. Sadly, the Tri-Valley Board also lost long time Board member, Committee Chair, Officer and friend when Grace Kirk died suddenly in June.

As we prepare for our future, we are investing in more staff members and their training for continued growth and work with the insurance companies in the Integrated Care Organization models of service as well as increased partnerships with medical groups.

In moving into our 37th year, our goals continue to be Dignity, Independence and Choice for people with disabilities, adults over the age of 60 and caregivers.
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 2012, the department responded to 7,168 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 are part of the Tri-Valley family and 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 Nutrition Program provides meals-on-wheels to home-bound elders and congregate meals at ten Nutrition Centers and nine Senior Lunch Clubs with help from hundreds of dedicated volunteers.

The Adult Family Care (AFC) Program provides family living 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 Ombudsman Program offers a way for residents in long-term care facilities to voice their concerns and have their complaints addressed.

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

Healthy Aging Programs include A Matter of Balance (MOB), My Life My Health Chronic Disease Self-Management (CDSM) and Diabetes Self-Management, and Healthy Eating for Successful Living in Older Adults.

The Care Transitions Initiative 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 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 2012 (July 1, 2011 — June 30, 2012)**

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

($5,000 - $10,000)

($1,000 - $4,999)
Banfield Charitable Trust, Customers of Terrazza, The Fels Family Foundation, David Gagnon, Meals on Wheels Association of America, Katharine C. Pierce Trust, M. Smith Solutions, LLC, United Way of Webster & Dudley, Inc.

($500 - $999)
Ameriprise Financial / Designated by Irene Garand, Anna & Richie Bellows, DNS The Business Printer, Mary Ellen DeBaggis, Patrick & Pauline Govanni, The Publick House, Francis & Susan Nichols, Mary Lou Staples, Alan Steuer, Marilyn Travinski, Josephine Veglia, Walmart Foundation, Mr. & Mrs. Henry Whittier, Jr.

Cohasse Country Club’s Charitable Golf Tournament in June of 2012 benefitted both Tri-Valley and Southbridge Food Share. Pictured from left, Cohasse Country Club President Mike Canney & Vice President Warren Fontaine, Southbridge Food Share President Ray Fournier, tournament co-chairs Cathy LaBonte and Michelle Reis, and Tri-Valley Executive Director Marilyn Travinski.

Enjoying the Fundraising Dinner at the Publick House (at left) Board Member Attorney Harold D. Gould, Jr., and his wife Jeanne, (at right) Board Member Grace Kirk with her husband Dr. Robert Kirk, and Kim Ripa.
Sources of Revenue
Fiscal Year 2012 (July 1, 2011—June 30, 2012) Unaudited

Executive Office of Elder Affairs $9,384,463 53.53%
Medicaid $4,857,433 27.71%
Private Contracts $1,694,783 9.67%
Project Income and Client Fees $695,796 3.97%
Central Mass Agency on Aging $630,671 3.60%
Fundraising and Donations $136,136 0.78%
Commodity Foods - NSIP $57,213 0.33%
Grants and Appropriations $55,013 0.31%
Interest and Investment $17,901 0.10%

Total $17,529,410 100.00%

In FY 2012, 94.6% of agency revenue was used to provide direct services. Only 5.4% 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.
We are grateful for all donations and apologize for any errors or omissions.
Memorial & Tribute Donations

- Donations in Memory of -

- Donations in Honor of -
Kathleen Antonucci, Jeff Baker, Pearl Bellerive, Paula Bradley, Josephine Veglia’s Family, Harry & Margaret McMahon, Ken Prue, Tri-Valley Volunteers

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

Special Mentions

In March of 2012, staff celebrated as they reached 200 clients in Adult Family Care (AFC) and 300 consumers in Personal Care Attendant (PCA).

Board Member Irene Garand received a citation from Senator Brewer as she was honored at the State House for 17 years of service as a Money Management Advisory Board Volunteer.

Annual Report Design/Production credits to Barbara O’Brien with assistance from Diane Mathurin.
Over 900 Volunteers Support Our Mission in their Communities!

ADVISORY BOARDS — Money Management—Patricia Buma, Elisabeth Earle, Irene Garand, Linda Slota, Terrie Swallow, Josephine Veglia
Nutrition Project Council—Alice Belanger, Patricia Benoit, Elisie Casey, Theresa Chad, Emma Cote, Rosemarie DiCampos, Charlotte Hougasion, Dorothy Ireland, Coleen Labelle, Frederica LaMonda, Gloria Latino, Delphis Levia, Alex & Phyllis Menafo, Marsha Murray, Marie Rebecchi, Margaret Stevens, Carol Walker, Deborah Yeaman

COMMUNITY SUPPORT SERVICES — Companion & Friendly Visitor: Lucy Beeman, David Beland, Peggy Berube, Janice Boutiette, Kristi Cromwell, Autumn Howe, Karyn Kuszewski, Jason Langley, Betty LeFort, Alice Picard, Mary Utting.
Office Support: Rose Smoolca Money Management: Jeff Baker, Debby Bevan, David Bond, Patricia Buma, Trace Burns, Patricia Czerkowicz, Paul Dunn, Elisabeth Earle, William French, Irene Garand, Paula Prout, David Handley, Sallie Hanson, Mary Anne Hickey, Linda Huempfner, Marjorie Huse, Martina Koziaj, Donna Lancey, Al Latini, Stephen Lavigueur, Robert Maynard, Lisa Menard, Debra Moore, Danato Niro, Brian Perry, John Roderick, Yvette Rogala, Joanne Santucci, Patricia Schonhoff, Michelle Seale, Donna Serwa, Linda Slota, Rose Smoolca, Robert Snow, Elizabeth Steel Gianacla, Brenda Sullivan, Terri Swallow, Josephine Veglia, Roberta Weishaut.

OMBUDSMAN — Marie Baker, Martin Civen, Patricia Corson, Sue Crockett, Sylvia Giusti, Beverly Gravison, Alice Hunt, Kenneth Jussaume, Richard Karazia, Ann Kendall, Robert Leary, Lania Poilier, Maria Robert, Janet Stoica, Norma Jean Swasey, Joyce Waters


Office Support: Ella Pickering, Claire Poulin, Charleen Rothrock, Constance Ruey, Robert Rue, Michael Smith, Jennifer Walsh, Lucy Williams

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We are grateful for the service of each Volunteer and apologize for any errors or omissions.
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 900 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.

Board of Directors
President: Mary Lou Staples, Medway
1st V. President: Josephine L. Veglia, Esq., Oxford
2nd V. President: Francis X. Small, Esq., Milford
Treasurer: Brian J. Perry, Webster
Secretary: Fred Tingley, Medway
Past President: Irene M. Garand, Sturbridge
Audrey Bacon, Dudley
Lucy Beeman, Brookfield
Nancy L. Bradley, Mendon
Barbara A. Clancy, Brookfield
Thomas J. Cullen, Uxbridge
*James DiLibero, Blackstone
Harold D. Gould, Jr., Esq., Whitinsville
*Ronald Higginbottom, Franklin
*Dorothy E. Ireland, North Oxford
Ruth King, Spencer
**Grace M. Kirk, Southbridge
*left during the year
**deceased during the year

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, Northboro, Oakham, Paxton, Rutland, Shrewsbury, Westboro, West Boylston & Worcester

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