37 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.
In Memoriam

The 2013 Annual Report is dedicated in memory of

Fred Tingley

Fred actively served on the Board of Directors for 14 years. He carried out leadership roles as an Officer, Committee Chairperson for Policies and Procedures, and as a member of numerous committees of the Board.

Along with his dedication and knowledge, Fred had a great ability to tell the best stories and make us laugh even in the midst of serious business.

Fred was honored with the Outstanding Board Services Award in 2007 by his fellow Board Members.

On the cover, Ethel receiving a home delivered meal from Donna.
Message from the President & Executive Director

Our 37th year of service to seniors, younger disabled people and caregivers was fast-paced from beginning to end. If we could choose only one word to describe Tri-Valley’s 2013 Fiscal Year, that word would be GROWTH.

Our work with the Senior Care Organizations (SCO’s) of Evercare, Navicare and Senior Whole Health continued to expand as did our work with the disability community both within our Aging and Disability Resource Center (ADRC) Central MA partnership and within our Personal Care Attendant Program and our Family Care Program.

As the Executive Office of Elder Affairs ended our statewide waitlist, our declining numbers in State Home Care began to slowly increase again. We are grateful to the legislature for the additional funds voted this spring, and we hope these funds will allow us to cover needed growth and services into the FY 2014 year in the State Home Care Program and the Protective Services Program.

Increasing numbers of clients required the addition of more staff members and our new staff members reflect the diversity of our client population. Our staff members currently speak English, Spanish, French, Russian, Amharic, Cambodian, Arabic, Somali, Tagalog and American Sign Language. We continue to seek diversity in our staff as our consumers come to us from more diverse populations.

Eight years ago, when we moved to the upper floor of Dudley Mill, we thought that we had plenty of room to grow for the foreseeable future. We were wrong. Our rapid growth in both programs and consumer populations requires us to provide for staff expansion. We are working with an architectural design firm to develop the lower level of Dudley Mill. While this projected growth is another challenge, we are grateful that we have the availability of the lower level in which to grow.

We are grateful for the work of our professional staff members, our army of volunteers, our donors, our community partners, our collaborating agencies, our contracted vendor agencies and the individuals and families who entrust us with their care. We look forward to continuing these successful partnerships for many years in the service of our mission.

Marilyn L. Travinski  
Executive Director/CEO

Mary Lou Staples  
Board President

Tri-Valley wishes to acknowledge and thank Mary Lou Staples for her six years of dedicated service as Board President of Tri-Valley, Inc.
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 7,364 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 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 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.
Services (continued)

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 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.

Money Manager Volunteers assist seniors with bill paying and account balancing.

The Nutrition Program provides good nutritious meals for people in the community and at home.

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

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

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.

| AFC Clients | 231 |
| PCA Clients | 558 |
| Congregate Meals Served | 51,038 |
| Meals-on-Wheels Served | 224,289 |
| Companion/Visitor Clients | 8 |
| Money Management Clients | 74 |
| CDSM Diabetes Participants | 6 |
| Healthy Eating Participants | 11 |
| Powerful Tools Participants | 16 |
| ASN Helpline Calls | 69 |
| ASN Respite Days Funded | 33 |
| ASN Support Group Attendees | 243 |
Foundation & Major Donor Support
Fiscal Year 2013  (July 1, 2012 — June 30, 2013)

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

($15,000)
Fallon Community Health Plan

The Fallon Community Health Care Plan awarded $15,000 to Tri-Valley’s Nutrition Program through their Community Benefits Program to support meals and nutrition education for older adults.

($5,000 - $10,000)
Greater Worcester Community Foundation,
John J. & Elizabeth M. Kunkel & Family Foundation, Inc.,
United Way of Southbridge, Sturbridge & Charlton, Inc.,
United Way of Webster & Dudley, Inc.
Webster Five Foundation

($1,000 - $4,999)
Banfield Charitable Trust, Church World Service Milford MA CROP Hunger Walk, Community Partners for Health—CHNA 6, Customers of Terrazza,
The Fels Family Foundation, David Gagnon, Angela Lariviere,
Meals on Wheels Association of America, Katharine C. Pierce Trust

($500 - $999)
Attorney Anna M. & Richie Bellows, Gretchen Blauvelt, Irene Garand, Patrick & Pauline Govanni, Martin & Andrea Magoon, Francis & Susan Nichols, Southbridge Savings Bank, Mary Lou Staples, Marilyn Travinski, Webster First Federal Credit Union Employees
**Sources of Revenue**

Fiscal Year 2013  (July 1, 2012—June 30, 2013)  Unaudited

<table>
<thead>
<tr>
<th>Source of Revenue</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Office of Elder Affairs</td>
<td>$9,715,663</td>
<td>50.79%</td>
</tr>
<tr>
<td>Medicaid</td>
<td>$5,484,204</td>
<td>28.67%</td>
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<tr>
<td>Private Contracts</td>
<td>$2,382,273</td>
<td>12.45%</td>
</tr>
<tr>
<td>Project Income and Client Fees</td>
<td>$667,846</td>
<td>3.49%</td>
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<tr>
<td>Central Mass Agency on Aging</td>
<td>$513,673</td>
<td>2.69%</td>
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<tr>
<td>Fundraising and Donations</td>
<td>$150,134</td>
<td>0.78%</td>
</tr>
<tr>
<td>Grants and Appropriations</td>
<td>$133,267</td>
<td>0.70%</td>
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<tr>
<td>Commodity Foods - NSIP</td>
<td>$67,520</td>
<td>0.35%</td>
</tr>
<tr>
<td>Interest and Investment</td>
<td>$15,380</td>
<td>0.08%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$19,129,960</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

In FY 2013, 94.8% of agency revenue was used to provide direct services.

Only 5.2% of revenue went to the administration of Tri-Valley.

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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.
General Donations

($200 - $499)

($100 - $199)

(Up to $99.00)

We are grateful for all donations and apologize for any errors or omissions.
Memorial & Tribute Donations

- Donations in Memory of -


- Donations in Honor of -

All Volunteers, Pearl Bellerive, Jayne Cacciapuoti, George Lorkiewicz, Meals-on-Wheels, Emily Morgan, Rocky, Chet Schofield, Tri-Valley, Inc.,

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

George Wild Award

The Horace Mann Educational Associates (HMEA) Volunteer Team was honored with the Nutrition Program’s prestigious George Wild Award in December of 2012. Flanked by judges Laurie Black Silver and Jean Travis, with job coach Mel in the middle, are four representatives of the 28 member team who, with their job coaches, deliver meals for Tri-Valley.

Annual Report Design/Production credits to Barbara O’Brien with assistance from Diane Mathurin.
ADVISORY BOARDS — Money Management — Patricia Buma, Elisabeth Earle, Irene Garand, Linda Slota, Terrie Swallow, Josephine Veglia Nutrition Project Council — Elsie Casey, Theresa Chad, Emma Cote, Rosemarie DiCampo, Charlotte Hougasian, Dorothy Ireland, Diane Kierstead, Gloria Latino, Delphis Levy, Marsha Murray, Janis Puziak, Marie Rebecchi, Margaret Stevens, Diane Swanson, Carol Walker, Deborah Yeaman

COMMUNITY SUPPORT SERVICES — Companion & Friendly Visitor: Lucy Beeman, Peggy Berube, Janice Boutiette, Kristi Cromwell, Betty Ann Gadoury, Autumn Howe, Barbara LeBel, Alice Picard Money Management: Jeff Baker, Tracy Burns, Patricia Czerkowicz, Paul Dunn, David Handley, Sallie Hanson, Mary Anne Hickey, Debra Hippert, Linda Huempfner, Donna Lancey, Al Latini, Stephen Lavigueur, Pamela LeBlanc, Lisa Menard, Deborah Montgomery, Debra Moore, Donato Niro, Brian Perry, Paula Prout, John Roderick, Yvette Rogala, Joanne Santucci, Patricia Schonhoff, Michelle Seale, Donna Serwa, Rose Smooca, Robert Snow, Elizabeth Steel Giancola, Brenda Sullivan, Roberta Weissbaut, Deborah Wilczynski

OMBDUSMAN — Marie Baker, Martin Civin, Patricia Corson, Sue Crockett, Joely Fria, Beverly Gravison, Alice Hunt, Robert Leary, Nancy Ollis, Lorienna Poller, Robricard, Luisa Sonntag, Charlene Tingley, Joyce Waters

NUTRITION — Blackstone: Rita Alarie, Alternatives, Paul Borges, Joan Briere, Deborah Butero, David Ceolinski, Helen Dufault, Elizabeth Dunsmuc, Mary Gadsby, Ronald Gadsby, Stella Gallant, Mary Garipey, Constance Laren, Carol Laura, Nancy Lesperance, Geraldine Marchand, Susan Marcotte, Kimberly Martellini, Marcia McDonald, Robert Morse, Justin O’Connell, Elaine O’Sullivan, Margaret Patrowicz, Matt Piedmonte, Alan Rainville, Cindy Robeau, Jeanne Rocheil, Ellen Samarco, Mary Eileen Stocky, Dawn Wante, Patricia Wells


Eastover: Patricia Buma, Elisabeth Earle, Irene Garand, Howard Gomor, Marilyn Gomor, Devi Mayer, Helen McCarthy, Deborah McClellan, Melissa Piscia, Lisa Ravinal, Carl Rice, Paul Rice, Wendy Rowe, Susan Rozaik, Janet Towle, Grace Wenzel, Paul Wrobel


Nutrition Project Council — Elsie Casey, Theresa Chad, Emma Cote, Rosemarie DiCampo, Charlotte Hougasian, Dorothy Ireland, Diane Kierstead, Gloria Latino, Delphis Levy, Marsha Murray, Janis Puziak, Marie Rebecchi, Margaret Stevens, Diane Swanson, Carol Walker, Deborah Yeaman
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
Secretary: Nancy L. Bradley, Mendon
Past President: Irene M. Garand, Sturbridge
Audrey Bacon, Dudley
Theodore A. Bartlett, Southbridge
Lucy Beeman, Brookfield
Barbara A. Clancy, Brookfield
Thomas J. Cullen, Uxbridge
Harold D. Gould, Jr., Esq., Whitinsville
Ruth King, Spencer
Evelyn A. Petrelli, Southbridge
*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