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


In addition to the towns shown above, the Adult Family Care Program also serves: Auburn, Barre, Boylston, Grafton, Hardwick, Holden, Leicester, Milbury, New Braintree, Oakham, Paxton, Rutland, Shrewsbury, West Boylston and Worcester, and, the Personal Care Attendant Program also serves: Auburn, Leicester, Milbury and Worcester.

Tri-Valley Annual Report
2016

40 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.
North Brookfield: Milca Ayaia, Karen Benoit, Sheila Courchaine, Victoria Czaja, Debra DeBurge, Polly Gauthier, Edith Hubacz, Catherine Knight, Judy Manning, Heather Martin, Janice Proctor, Joyce Stone, Aletha Urquhart
West Brookfield: Heather Aiken-Porter, Margaret Beer, Robert Bents, This Annual Report is dedicated in honor of Joan Bodessa, Marion Boos, Carolyn Boucher, Berkeley Burnham, Ellie Casey, Center of Hope, Bonnie Hollins, Jessica Deyo, Mary Lucy Beeman, Mesa Choices
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Message from the President & Executive Director

In recognizing the work that Tri-Valley accomplished during our 40th year, the word that seems most definitive is growth. We have experienced continuing growth in our traditional programs, community relationships, partnerships, new initiatives and numbers of seniors, younger disabled people and caregivers of all ages.

These program expansions and services have required additional staff members who have learned to serve consumers who are more frail and who have more complex needs than ever before. Fortunately, our timely construction of an additional 20,000 square feet of new space on our lower level has given us room for more offices, a bigger Meals on Wheels kitchen, a wonderful conference facility, and a better overall experience for our consumers, meeting attendees and staff members.

Community partnerships have given us many opportunities to serve traditionally underserved populations in new ways. As a result, our work with homeless people, veterans, seniors in crisis and victims of abuse has grown numerically and experientially.

Our partnerships with insurance companies through the Senior Care Options and the One Care Program have increased our knowledge and expertise in working directly with the area medical communities. Our Care Transitions Program continues to lead the way to better care and lower hospital readmissions as we work with our Central Mass partners and the UMASS hospital system.

We acknowledge the dedicated work of our staff members, volunteers, Board and Adrian Committee members as well as our partner agencies in serving our consumers and work together for the common good as we begin our fifth decade of service in South Central Massachusetts.
# Services in Your Home and Community

## Program Statistics for Fiscal Year 2016

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Statistic Description</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>State Home Care</strong></td>
<td>Information &amp; Referral Calls</td>
<td>5,275</td>
</tr>
<tr>
<td></td>
<td>State Home Care Consumers</td>
<td>2,347</td>
</tr>
<tr>
<td></td>
<td>Senior Care Organization Members</td>
<td>922</td>
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<tr>
<td></td>
<td>One Care Members</td>
<td>345</td>
</tr>
<tr>
<td></td>
<td>Clinical Assessment &amp; Evaluation Screenings</td>
<td>1,277</td>
</tr>
<tr>
<td><strong>Protective Services</strong></td>
<td>Protective Services Cases</td>
<td>752</td>
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<tr>
<td></td>
<td>Crisis Intervention Cases</td>
<td>187</td>
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<tr>
<td><strong>Nutrition Services</strong></td>
<td>Meals on Wheels Consumers</td>
<td>1,486</td>
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<tr>
<td></td>
<td>Meals on Wheels Delivered</td>
<td>218,381</td>
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<tr>
<td></td>
<td>Congregate Participants</td>
<td>1,693</td>
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<tr>
<td></td>
<td>Congregate Meals Served</td>
<td>44,829</td>
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<tr>
<td><strong>Care Transitions</strong></td>
<td>Care Transitions Referrals</td>
<td>1,984</td>
</tr>
<tr>
<td></td>
<td>Care Transitions Consumers</td>
<td>832</td>
</tr>
<tr>
<td><strong>Family Caregiver Support Program</strong></td>
<td>Caregiver Counseling &amp; Information Assistance</td>
<td>325</td>
</tr>
<tr>
<td></td>
<td>Group Outreach &amp; Education Participants</td>
<td>843</td>
</tr>
<tr>
<td></td>
<td>Caregiver Scholarships</td>
<td>42</td>
</tr>
<tr>
<td></td>
<td>Powerful Tools for Caregivers Participants</td>
<td>33</td>
</tr>
<tr>
<td><strong>Aging &amp; Disability Resources</strong></td>
<td>Options Counseling Consumers</td>
<td>245</td>
</tr>
<tr>
<td><strong>Adult Family Care</strong></td>
<td>Adult Family Care Consumers</td>
<td>231</td>
</tr>
<tr>
<td><strong>Personal Care Attendant</strong></td>
<td>Personal Care Attendant Consumers</td>
<td>1,019</td>
</tr>
<tr>
<td><strong>Community Support Services</strong></td>
<td>Money Management Consumers</td>
<td>51</td>
</tr>
<tr>
<td></td>
<td>Companion/Friendly Visitor Consumers</td>
<td>12</td>
</tr>
<tr>
<td><strong>Ombudsman</strong></td>
<td>Facility Visits</td>
<td>1,084</td>
</tr>
</tbody>
</table>

### Memorial & Tribute Donations

- **Donations in Memory of**
  - Frank Alexander, Jerry Anderson, Audrey Bacon, Roger Bacon, Helen Baird, Shirley Barnes
  - Dear Friends, Louise Bayrouty, Pearl Bellerive, Madhuri Bhachech, Joe & Ida Bonetti, B. Louise & Paul E.
  - Tingley, Helen & Joseph Tondorf, Quinto J. Trifone, Lionel Vincent

- **Donations in Honor of**
  - Harold Anderson, Paula Fitts, Annie Vautour’s Sister Jeanette, Lora & Jim Meyer Anniversary,
  - Dianne Mitchell, Sugar Divine & Spicer,
  - The Volunteers for the Meals-on-Wheels program in Upton, Aldina Vicario

**Special Thanks on Behalf of our Clients**

- **THE CORNERSTONE QUILTHERS OF CHARLTON, FOR BEAUTIFUL LAPROBES**
- **THE LADIES BENEVOLENT SOCIETY OF THE DUDLEY CONGREGATION CHURCH, FOR GIFT BASKETS**
- **TERRAZZA’S OF FRANKLIN, FOR THEIR GIVING TREE PROJECT**
- **WEBSTER MANOR FOR THANKSGIVING BASKETS**

Secretary Bonner joined in the Winter Food Project production with Marilyn Travinski, Kurt Wenzel & Lisa Prince

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

($200 - $499)
Kalpana & Ravindra Acharya, Alan Anderson, Batteries Unlimited, Bellingham Elder Service Group, Inc., Benevity Community Impact Fund / Designated by Irene Garand, Braman, Raymond Bussolori, Christ Memorial Episcopal Church, Barbara Clancy, Saints Constantine & Helen Greek Orthodox Church, Richard & Rosemarie DeGuetano, Fidelity Charitable Designated by Anne Kennedy, Fidelity Charitable Designated by James & Karen Noonan, Friends of the Sutton Elders, Inc., Karen Marcelli, Diane Mathurin, Anita Maurier, Miriam Hospital Immunology Department, Sam & Evelyn Pappas, Pirperis, Inc. DBA DQ Grill & Chill of Milford, Ruth A. Bleakney Senior Center, Attorney Francis Small, Mary Lou Staples, Union Saint Jean-Baptiste (Chapter 12), Webster First Federal Credit Union Employees

($100 - $199)
Georgia Argyropoulou, Mary Ann & Carl & John Armstrong & Angela Piekarczyk & Frank Cierpich, John & Marion Beleulfine, Anne Bergman, Big Banny Market, Inc., Nancy Bradley, Melissa Candida, Customers & Employees of Hannaford Supermarket, Janet & Daniel Daigle, Deborah Egan, First Congregational Church of Webster, Raymond Bussolari, Christ Memorial Episcopal Church, Barbara Clancy, Saints Constantine & Helen Greek Orthodox Church, Richard & Rosemarie DeGuetano, Fidelity Charitable Designated by Anne Kennedy, Fidelity Charitable Designated by James & Karen Noonan, Friends of the Sutton Elders, Inc., Karen Marcelli, Diane Mathurin, Anita Maurier, Miriam Hospital Immunology Department, Sam & Evelyn Pappas, Pirperis, Inc. DBA DQ Grill & Chill of Milford, Ruth A. Bleakney Senior Center, Attorney Francis Small, Mary Lou Staples, Union Saint Jean-Baptiste (Chapter 12), Webster First Federal Credit Union Employees

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

Consumer Portraits

Chris

Chris is a 29 year old who lives with his parents and sister in Sutton. He has been a part of Tri Valley’s Adult Family Care Program since 2010. Chris attends the Center of Hope where he participates in karaoke and kitchen workshops. He likes to go bowling and play basketball in his spare time. Chris is a sports fanatic who loves the New England Patriots, Boston Red Sox and the Boston Bruins. He rarely misses a game on TV and always keeps an eye on the latest statistics.

Theresa

Theresa is 90 years old and has lived in the home her father built since birth. She loves her little dog, Gizmo, and enjoys spotting deer and other wildlife in her yard. Theresa no longer drives and is very pleased with the home-delivered meals and the caring people from Tri-Valley’s Nutrition Program who check in on her when delivering the meals.

Alfred

Alfred has lived at Golden Heights for six years and raves about the in-home services from Tri-Valley, including Homemaker and Meals on Wheels. Most recently, he met with one of our Options Counselors who provide free services to all individuals needing information to help them make good decisions about community supports and long-term care.

We are grateful for all donations and apologize for any errors or omissions.
**Foundation & Major Donor Support**

**Fiscal Year 2016 (July 1, 2015 — June 30, 2016)**

($25,000)
George W. Wells Foundation, Bank of America, N.A., Trustee

($10,000)
Greater Worcester Community Foundation—Elva E. & John J. Chisholm Fund
John J. & Elizabeth M. Kunkel & Family Foundation, Inc.

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

($1,000 - $4,999)
Estate of Christian Bing, Country Bank for Savings, Customers of Terrazza, Gerald & Marilyn Fels, David Gagnon Greater Milford Community Health Network-CHNA 6, St. Vincent Community Healthcare Fund, SpencerBANK, Uxbridge Rotary Club

($500 - $999)
Bill McClurg & Tammy, Mary, Laurie, Judy, Bill A., Jon & Bob at Load Controls, Inc., Medway Lions Club, Mary Falardeau, Irene Garand, Pauline Giovanni, Lynn Harris, Martin & Andrea Magoon, Judith Manning, John & Ellen Rockwell, Marilyn L. Travinski, Josephine Veglia, Chartwells

Visit from Alice Bonner, Secretary of Elders Affairs.
Pictured left to right: Marilyn Travinski, Executive Director; Carol Muschler, Nutrition Director; Lisa Prince, Assistant Executive Director; Secretary Bonner, Brian Perry, Board Treasurer & Fran Small, Board President

**Sources of Revenue**

**Fiscal Year 2016 (July 1, 2015 — June 30, 2016) Unaudited**

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Office of Elder Affairs</td>
<td>$11,041,984</td>
<td>47.81%</td>
</tr>
<tr>
<td>Medicaid</td>
<td>$6,071,302</td>
<td>26.29%</td>
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<tr>
<td>Private Contracts</td>
<td>$4,291,727</td>
<td>18.58%</td>
</tr>
<tr>
<td>Project Income and Client Fees</td>
<td>$701,555</td>
<td>3.04%</td>
</tr>
<tr>
<td>Central Mass Agency on Aging</td>
<td>$617,657</td>
<td>2.67%</td>
</tr>
<tr>
<td>Fundraising and Donations</td>
<td>$171,587</td>
<td>0.74%</td>
</tr>
<tr>
<td>Commodity Foods - NSIP</td>
<td>$125,100</td>
<td>0.54%</td>
</tr>
<tr>
<td>Grants and Appropriations</td>
<td>$73,392</td>
<td>0.32%</td>
</tr>
<tr>
<td>Interest and Investment</td>
<td>$2,865</td>
<td>0.01%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$23,097,169</strong></td>
<td><strong>100.00%</strong></td>
</tr>
</tbody>
</table>

*Only 6.28% of total revenue went to the administration of Tri-Valley.*

**Staffing**

As of the end of Fiscal Year 2016, Tri-Valley had 104 full-time employees and 64 part-time employees for a total of 168 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.