

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 600 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

All Services in: Bellingham, Blackstone, Brookfield, Charlton, Douglas, Dudley, East Brookfield, Franklin, Hopedale, Medway, Mendon, Milford, Millville, Northbridge, North Brookfield, Oxford, Southbridge, Spencer, Sturbridge, Sutton, Upton, Uxbridge, Warren, Webster & West Brookfield. *In addition to the towns shown above, the Adult Family Care Program also serves:* Auburn, Barre, Boylston, Grafton, Hardwick, Holden, Leicester, Millbury, New Braintree, Oakham, Paxton, Rutland, Shrewsbury, West Boylston and Worcester, and the *Personal Care Attendant Program also serves:* Auburn, Leicester, Millbury and Worcester. *Benefits Enrollment Services are available in all 61 communities of Central Massachusetts*

2019 Annual Report

43 Years of Giving People

DIGNITY • INDEPENDENCE • CHOICE

Fiscal Year 2019 Board of Directors

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Virginia Rapo, Southbridge

Kevin Rudden, Mendon

This Annual Report is dedicated in honor of Harold D. Gould, Jr. for 23 years of dedication and service to Tri-Valley, Inc. as a member of the Board of Directors.

Staffing, Volunteers, Internships & Co-ops

Staffing ...

You can rely on Tri-Valley's knowledgeable and professional staff. Since 1976, we have been helping people get the information and services they need. As of the end of Fiscal Year 2019, Tri-Valley had 115 full-time employees, 47 part-time employees and 38 substitute/per diem employees for a total of 200 staff members.

Volunteers ...

The helping hands and caring hearts of over 600 Volunteers partner with Tri-Valley to deliver Meals on Wheels, provide Money Management assistance, package and serve meals at Nutrition sites, assist with office work and participate in volunteer event day projects.

Internships & Co-ops ...

Following the first Shadow Day with Anna Maria College (developed for students in their Health & Community Service major) four students interned at Tri-Valley in various programs. The college also became a resource for recruitment of new staff from their pool of recent graduates.

A Co-op program with business students at Bay Path Regional Vocational High School began this year. Two students provided administrative support while also learning the "soft skills" of appropriate business conduct and interaction.



The first Shadow Day at Tri-Valley with Anna Maria College students and their advisor

Tri-Valley Outreach, Events & Projects



Tri-Valley's 2nd Annual Health & Wellness Fair



The Subaru Share the Love Event in support of Meals on Wheels



Elder Abuse Awareness Day at Tri-Valley



Tri-Valley outreach at the YMCA's Healthy Kids Fair



Tri-Valley's 24th Annual Winter Food Project - 975 bags of non-perishable food were assembled and delivered to the agency's neediest consumers

Message from the President & the Executive Director

Looking back over the year, it is amazing to see all that has been accomplished at Tri-Valley. During a time of great change in the provision of health and community-based services, Tri-Valley maintains its mission of supporting people in their homes at every turn.

With a grant from the National Council on Aging, we have provided resources and information to over 500 people through our Benefits Enrollment Center, one of the first such Centers in the state. The Adult Family Care program, which provides support to over 200 home matches, received a three-year accreditation from the National Center for Quality Assurance. We have established a relationship with Anna Maria College that has resulted in numerous internship opportunities and a direct "pipeline" of qualified candidates to begin addressing the challenges of workforce. We have been working closely with the legislature, the Executive Office of Elder Affairs and our provider partners to seek ways to assist with recruitment and retention of direct care professionals to continue to provide high quality in-home care to our clients. During the year, we completed bidding and selection processes for a timekeeping system, health care benefits, pension management, liability insurance, landscaping and snow removal and technology support.

All of these areas have contributed to a positive work environment, qualified professional employees, an active Board of Directors and our continued ability to meet our mission of helping people maintain their independence and remain in their residence of choice for as long as possible. We are incredibly proud of the work being done at Tri-Valley every day by both our 200 employees and 600+ volunteers. While not every day is easy, the rewards far outweigh the challenges. We look forward to maintaining our momentum and seeking new opportunities that continue to benefit the people we support.



Frances X. Small
President



Elisabeth "Lisa" Prince
Executive Director

Home With You

Our mission is helping seniors and people with disabilities to live independently with dignity in their own homes or settings of their 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. Our goal is to make it easier for you to find solutions and access appropriate services.

Following are some stories of struggle, problem solving and success.

Family isn't always blood; caregivers often become our chosen family. This statement holds true as evidenced by the love and dedication Mary and Daniel delivered through the care of Stanley for over ten years. Stanley was placed in the home of Mary and Daniel on hospice care. Initially, Stanley was resistant to having people of color care for him. Despite Stanley's stubbornness and reluctance, the family remained persistent and committed to their role as caregivers. Over time, they gained Stanley's trust, respect and love. Not only did they cater to Stanley's physical needs, but they also ensured that his emotional, social and cultural needs were met. Stanley was immersed into their family life and was treated like a son. He went to church with the family on Sundays and on one occasion volunteered to sing for the congregation. He participated in the Special Olympics bowling for years. As his health failed, Mary and Daniel refused to take their yearly trip to Kenya as they feared Stanley would not receive the 24-hour attention that he deserved in a nursing facility. They stated numerous times that Stanley was their son and they would care for him until the day he passed away. Mary worked very well with the Tri-Valley, Seven Hills and DDS staff members to ensure that Stanley's care needs were met. She would often seek out other resources to improve his quality of life. Stanley was not only a member placed in the household; he was family, a welcomed member of the Kenyan community and beloved member of the church. Stanley's story is truly an inspiration to the Adult Family Care department and our agency. *(Keri, AFC Supervisor)*



Memorial & Tribute Donations

- Donations in Memory of -

Mrs. Patricia "Pat" Allegra, Beatrice Andrews, Lionel A. Ayotte, Audrey Bacon, Cud Baird, Shirley Barnes' Loved Ones, Pearl Bellerive, Paul & Louise Bonnette, John W. Brown, Jr., Jeanette Bussolari, Paul Charette, Ruth Chiasson, Virginia & Joseph Chiuchiolo, Charles Christos, Madeline Credit, Leo & Lena DeLuca, Doreen Donaldson, Rabia Farooq, Edith Fernald, Elizabeth Flamand, Patrick & Pauline Govanni, Eva T. Grigas, Carl Jankowski, Edward Jarosz, Tom & John Jedrzynski, Ernest Johnson, Stance & Dorothy Kalwarczyk, James Knight, DVM, John L. Lapomardo, Charles Majka, Sophie & Vinnie Marsella, Alfred & Yoda Mathurin, David O'Toole, Richard Pedroli, Sr., Dudley Perry, Helen Poirier, Vincent Rannigan, Gaylord Rheame, Mary & Cliff Rivet, Evelyn & David Saucier, Anna Sielawa, James D. Small, Lisa Spillane, Frederick J., Margaret C., Fred A., Robert E. and Alice Tingley, Helen & Joseph Tondorf, Jean Vezina, Lionel Vincent

- Donations in Honor of -

Laura Black Silver, Irene Garand, Sandy Graeff, Tom Griffin, Susan Koziak, Dolores Lee, Diane Mathurin, Stance & Dorothy Kalwarczyk, Marilyn Travinski, Aldina Vicario

Special Thanks on Behalf of our Consumers

THE CORNERSTONE QUILTERS OF CHARLTON, FOR BEAUTIFUL LAP ROBES
THE ELDER ANGELS OF WEBSTER, DUDLEY & OXFORD, FOR HOLIDAY GIFTS
THE LADIES BENEVOLENT SOCIETY OF THE DUDLEY CONGREGATIONAL CHURCH, FOR GIFT BASKETS
TERRAZZA'S OF FRANKLIN, FOR THEIR GIVING TREE PROJECT
WEBSTER MANOR FOR THANKSGIVING BASKETS

General Donations

Fiscal Year 2019 (July 1, 2018 – June 30, 2019)

(\$200.00 - \$499.00)

Advanced Home Care Services, LLC., Bellingham Elder Service Group, Inc., Raymond Bussolari, Catholic Financial Life, Bernard Chase, Customers & Employees of Dean Bank – Franklin Office, Dudley Nutrition Site, Estate of Christine O'Brien, Friends of the Sutton Elders, Inc., Brian & Sandra Graeff, Dorothy Gravison, Diane Mathurin, Carol Muschler, Mr. & Mrs. Stuart Nectow, Patrice Rousseau, Attorney Francis Small

(\$100.00 - \$199.00)

308 Lakeside Inc., Thomas & Catherine Andrade, Jeanne Ayotte, Robert Bauer, Big Bunny Market, Inc., Theodore Christensen, Cormier Jewelers, Janet & Daniel Daigle, Jean Dalbec, Rosemarie DeGaetano, Dudley Gendron Post 414A L, Fidelity Charitable Gift Fund Designated by James & Caren Noonan, Franklin Nutrition Site, Irene Garand, Gary & Janine Goldberg, Ann Marie Gonyea, Beth Groccia, Patricia A. Kelly, Theresa Laroche, Carolyn Lavalley, Daniel Leduc, Gail Leonick, Anita Maurier, Michael & Ann McCurdy, Lora & Jim Meyer, Laurance & Patricia Morrison, Kathryn Nasinnyk, Peter & Madeline Nawrocki, Edward Niedbala & Cheryl Leyden, Tom & Barbara O'Brien, Sam & Evelyn Pappas, People for Animals League, Virginia Rapo, Bernice Rheäume, Kevin Rudden, Joyce Simpson, Melissa Mercon Smith, Specialty Home Care Services, Inc., Spencer Howe Village Residents, Upton Nutrition Site, Uxbridge Nutrition Site, Uxbridge Site Anonymous Donor, Verizon Foundation Designated by Edward Niedbala, West Brookfield Nutrition Site

(Up to \$99.00)

Mary Alex, Carolyn Amaral, Aucoin Ryan Realty, Elyse Auerbach, Richard Auger, Cynthia Bachand, Shirley Barnes, Theodore Bartlett, Sylvia Bates, Gregory Bazinet, Rosalie Beals, Albert Bellerive, Loretta Chabot, Theresa & Kenneth Chad, Simon Chiasson, Jr., Chris Daggett & Shannon Walsh, Conseil Rochambeau-Brochu #12, Lorraine & Jim DaDalt, Genevieve DeHaan, Leonard DeLuca, Patrick Joseph DeMarco, Neil Denny, Barbara Dewing, Albert V. & Virginia DiVirgilio, Irene Donais, James Donaldson, Douglas Lunch Club, Faheem & Mariam Farooq, Regina Ferrera, Betty Ann Gadoury, Bernard Genga, Marlene Gevry, Theresa Giguere, Attorney & Mrs. Harold D. Gould, Marie Grogan, Evelyn Grovesteen, Donna Guilbert, Gail Haddad, Evelyn Helpa, Laurel Henderson, Edward W. & Deb Horton, James & Rosemary Howard, Mildred Jacques, Debra Jameson, Rochelle Jedrzynski, Corilda Johnson, Joshua Place Tenants Organization, Louis Kozlowski, The Ladies of Foxboro Radiology, Lucille Langlois, Jeanette LaPlante, Sue Lewandowski, Irene Lucier, Cecelia Majka, Claire Malkasian, Angelo Marcos, Rocco Marino, Raymond & Tracey Martin, Michelle Masse, Linda Moriarty, David Morris, Marsha Murray, Paul Neaz, Dorothy Pedroli, Jeff & Nancy Perry, Popular Precast Products, Lisa Prince, Professional Medical Services, Inc., Karen Quaiel, Deanna Randall, Virginia Rubrigi, Rosemary Salem, Joan Saucier, Scanlon Funeral Service, Inc., June Seagrave, Sitkowski & Malboeuf Funeral Home, Linda St. Francis, Irene & Chester Starzec, Charlette Strezelewicz, Janina & Nancy Swiacki, Janice Swindell, Paul Tondorf, Eleanor Tusia, Nancy Vajcovec, Annie Vautour, Marie Vezina & Family, Lisa Vicario, Alice Walker, Webster Dudley PAV Auxiliary, Elain Ziemba, Glory Zyskowski

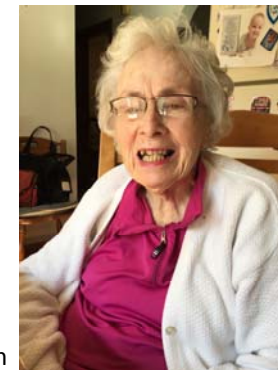
We are grateful for all donations and apologize for any errors or omissions.

Success Stories



After experiencing a stroke, Donald's nutritional status was challenged. His wife and other family members were working outside the household all day long and the stroke and other medical issues made it difficult for Donald to prepare a healthy meal for himself. The need for a wellness check and a balanced meal were very apparent to Deb, Tri-Valley's Nutrition Case Manager, when she assessed Donald's situation. After receiving Meals on Wheels (MOW), Donald has maintained his weight and has no new medical issues. Donald is very grateful for the nutritious meals and happily awaits the arrival of the driver each day who always has a friendly greeting. He can't imagine why anyone wouldn't love the meals! *(Deb, Nutrition Case Manager)*

Mary is 94 years old and lives with her son, Bob. Before Tri-Valley came into the picture, Mary's five children helped out as much as possible, but still came short on providing all of the care their mother needed to remain at home. In December of 2017, Mary was approved for State Home Care (SHC) services followed by the lengthy task of completing the MassHealth application to attain more extensive services through the Personal Care Attendant (PCA) Program. Mary and her family worked closely with the SHC Care Managers, RN and Benefits Enrollment Specialist to complete the application and necessary assessments. Sadly, during that time, Mary's husband passed away, which caused a delay in the application process. Finally, Mary was approved for the MassHealth Frail Elder Waiver in January 2019 and started getting help from the PCA Program in February. She currently receives more than 40 hours a week of PCA services that meet her daily needs and allow her to continue living at home with her son. Mary's family members have expressed gratitude for the work of multiple Tri-Valley staff members and said that they would never have been able to navigate the system and their mother's extensive care plan without Tri-Valley. *(Gina, SHC Supervisor)*



Foundation & Major Donor Support

Fiscal Year 2019 (July 1, 2018 – June 30, 2019)

(\$60,000)

National Council on Aging

(\$30,000)

George W. Wells Foundation, Bank of America, N.A., Trustee

(\$10,000)

Greater Worcester Community Foundation

John J. & Elizabeth M. Kunkel & Family Foundation, Inc.

United Way of Southbridge, Sturbridge & Charlton, Inc.

(\$5,000 - \$9,999)

Meals on Wheels America & Subaru of America, Inc., Katharine C. Pierce Trust, Customers of Terrazza, Franklin,

United Way of Webster & Dudley, Inc., Webster Five Foundation

(\$1,000 - \$4,999)

Chartwells / Jeff Ward, Johnna & Mark Coggin, Cornerstone Bank, DCU-Digital Federal Credit Union,

Gerald & Marilyn Fels, Lynn Harris, M. Smith Solutions, LLC, Milford Nutrition Site, Quirk Wire Company, Inc.,

St. Vincent Community Healthcare Fund, Southbridge Nutrition Site, Sutton Lions Club, Sutton Nutrition Site

(\$500 - \$999)

Ameriprise Financial/Designated by Irene Garand, Barbara Clancy, Dudley Gendron Squadron 414 Sons,

Franklin Federated Church—Mission Fund, Medway Lions Club, Mary Lou Staples, Rotary Club of Uxbridge, Inc., Josephine Veglia



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.

Program Statistics & Sources of Revenue

Fiscal Year 2019 (July 1, 2018 – June 30, 2019)

Community Services & Information:

Information & Resource Calls: 9,691

Options Counseling Consumers: 298

Healthy Living Program Participants: 62

Congregate Housing Residents: 23

Resident Services Contacts: 1,861

Benefit Enrollment (BEC) Referrals: 703 BEC Consumers: 424

Family Caregiver Support

Caregiver Counseling & Access Assistance: 276

Group Outreach & Education Participants: 1,733

Technology Grant & Caregiver Scholarship Recipients: 29

Powerful Tools & Savvy Caregiver Participants: 35

Mass Health Programs:

Adult Family Care Consumers: 216

Care Transition Consumers: 82

One Care Members: 153

Personal Care Attendant Consumers: 1,368

Senior Care Organization Members: 1,153

Nutrition Services:

Meals on Wheels Consumers: 1,805 Meals Delivered: 222,322

Congregate Participants: 1,771 Congregate Meals Served: 38,741

Protective Services:

Protective Services Cases: 1,155

Crisis Intervention Cases: 269

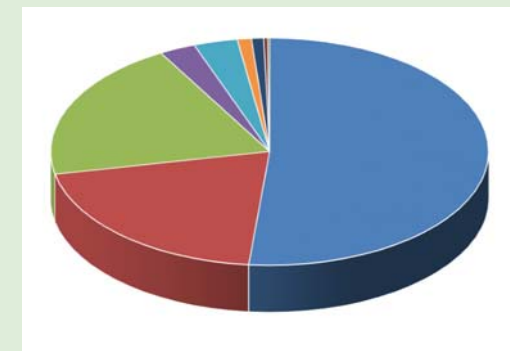
Money Management Consumers: 59

State Home Care:

Consumers: 2,215

Clinical Assessment & Evaluation Screenings: 1,473

Sources of Revenue Unaudited



Executive Office of Elder Affairs	\$13,186,676	51.56%
Medicaid	\$5,184,246	24.61%
Private Contracts	\$5,105,928	17.31%
Project Income and Client Fees	\$826,459	2.99%
Central Mass Agency on Aging	\$682,399	2.08%
Fundraising and Donations	\$266,264	1.00%
Grants and Appropriations	\$230,995	0.15%
Commodity Foods - NSIP	\$69,144	0.29%
Interest and Investment	\$41,851	0.01%
Total	\$25,593,962	100.00%

Only 6.64% of total revenue went to the administration of Tri-Valley.