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, Boynton, 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

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

2019 Annual Report

43 Years of Giving People

DIGNITY • INDEPENDENCE • CHOICE
Fiscal Year 2019 Board of Directors

**Officers**
- President: Francis X. Small, Esq., Milford
- 1st Vice President: Theodore A. Bartlett, Southbridge
- 2nd Vice President: Josephine L. Veglia, Esq., Oxford
- Treasurer: Brian J. Perry, Webster
- Secretary: Mary A. Falardeau, Brookfield
- Past President: Mary Lou Staples, Medway

**Directors**
- Gregory Bazinet, Webster
- Barbara A. Clancy, Brookfield
- Irene M. Garand, Sturbridge
- Harold D. Gould, Jr., Esq., Whitinsville
- Evelyn Grovesteen, Dudley
- James E. Howard, Charlton
- Ruth King, Spencer
- Laurence S. Morrison, Sturbridge
- Virginia Rapo, Southbridge
- Kevin Rudden, Mendon

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**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.

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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.

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The first Shadow Day at Tri-Valley with Anna Maria College students and their advisor
Tri-Valley Outreach, Events & Projects

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.
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 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. (Ken, AFC Supervisor)

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**Memorial & Tribute Donations**

- **Donations in Memory of -**

- **Donations in Honor of -**
  - Laura Black Silver, Irene Garand, Sandy Graeff, Tom Griffin, Susan Kozak, Dolores Lee, Diane Mathurin, Stance & Dorothy Kalwarczyk, Marilyn Travinski, Aldina Viciano

**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
Advanced Care Home Services, LLC., Bellingham Elder Service Group, Inc., Raymond Buscador, Catholic Financial Life, Bernard Christ, Custodiers of Employment, Deaconess, Diocese of Bellingham. Estate of Christine O’Keefe, Friends of the Sutton Elders, Inc., Brian & Sandra Graef, Dorothy Gravison, Diane Mathurin, Carol Muschiler, Mr. & Mrs. Stuart Nectow, Patrice Rousseau, Attorney Francis Small

(200.00 - $499.00)


Up to $99.00


PAX Auxiliary, Elain Ziemba, Glory Zyskowski

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

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 successfully applied for the program. 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 each day who always has a friendly greeting. He can’t imagine why anyone wouldn’t love the meals! (Deb, Nutrition Case Manager)

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 of other chronic conditions made it challenging 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 each day who always has a friendly greeting. He can’t imagine why anyone wouldn’t love the meals! (Deb, Nutrition Case Manager)
### Foundation & Major Donor Support

**Fiscal Year 2019** (July 1, 2018 — June 30, 2019)

<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>$13,186,676</td>
<td>51.56%</td>
</tr>
<tr>
<td>Medicaid</td>
<td>$5,184,246</td>
<td>24.61%</td>
</tr>
<tr>
<td>Private Contracts</td>
<td>$5,105,928</td>
<td>17.31%</td>
</tr>
<tr>
<td>Project Income and Client Fees</td>
<td>$826,459</td>
<td>2.08%</td>
</tr>
<tr>
<td>Central Mass Agency on Aging</td>
<td>$682,399</td>
<td>2.08%</td>
</tr>
<tr>
<td>Long Term Care Services</td>
<td>$230,995</td>
<td>0.29%</td>
</tr>
<tr>
<td>Meals and Snacks</td>
<td>$69,144</td>
<td>0.29%</td>
</tr>
<tr>
<td>Total revenue</td>
<td>$25,593,962</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

*As of June 30, 2019.*

**Notes:**
- Total revenue went to the administration of Tri-Valley.
- $1,155,000 from foundations.
- $5,184,246 from state government.
- $5,105,928 from private offices.
- $682,399 from Medicare.
- $230,995 from project income.
- $69,144 from state government.
- $41,851 from grants.
- $2,215 from other sources.
- Total revenue: $25,593,962.

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###Program Statistics & Sources of Revenue

**Fiscal Year 2019** (July 1, 2018 — June 30, 2019)

<table>
<thead>
<tr>
<th>Service</th>
<th>Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Services &amp; Information:</td>
<td>Information &amp; Resource Calls: 9,991</td>
</tr>
<tr>
<td>Options Counseling Consumers:</td>
<td>298</td>
</tr>
<tr>
<td>Healthy Living Program Participants:</td>
<td>62</td>
</tr>
<tr>
<td>Congregate Housing Residents:</td>
<td>23</td>
</tr>
<tr>
<td>Resident Services Contacts:</td>
<td>1,861</td>
</tr>
<tr>
<td>Benefit Enrollment (BEC) Referrals:</td>
<td>703</td>
</tr>
<tr>
<td>BEC Consumers:</td>
<td>424</td>
</tr>
<tr>
<td>Family Caregiver Support: Caregiver Counseling &amp; Access Assistance:</td>
<td>276</td>
</tr>
<tr>
<td>Group Outreach &amp; Education Participants:</td>
<td>1,733</td>
</tr>
<tr>
<td>Technology Grant &amp; Caregiver Scholarship Recipients:</td>
<td>29</td>
</tr>
<tr>
<td>Powerful Tools &amp; Savvy Caregiver Participants:</td>
<td>35</td>
</tr>
<tr>
<td>Mass Health Programs:</td>
<td></td>
</tr>
<tr>
<td>Adult Family Care Consumers:</td>
<td>216</td>
</tr>
<tr>
<td>Care Transition Consumers:</td>
<td>82</td>
</tr>
<tr>
<td>One Care Members:</td>
<td>153</td>
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<tr>
<td>Personal Care Attendant Consumers:</td>
<td>1,368</td>
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<tr>
<td>Senior Care Organization Members:</td>
<td>1,153</td>
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<tr>
<td>Nutrition Services:</td>
<td></td>
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<tr>
<td>Meals on Wheels Consumers:</td>
<td>1,805</td>
</tr>
<tr>
<td>Meals Delivered:</td>
<td>222,322</td>
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<tr>
<td>Congregate Participants:</td>
<td>1,771</td>
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<tr>
<td>Congregate Meals Served:</td>
<td>38,741</td>
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<tr>
<td>Protective Services:</td>
<td>1,155</td>
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<tr>
<td>Crisis Intervention Cases:</td>
<td>269</td>
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<tr>
<td>Money Management Consumers:</td>
<td>59</td>
</tr>
<tr>
<td>State Home Care Consumers:</td>
<td>2,215</td>
</tr>
<tr>
<td>Clinical Assessment &amp; Evaluation Screenings:</td>
<td>1,473</td>
</tr>
</tbody>
</table>

**Notes:**
- Total individuals served: 1,805.
- Meals delivered: 222,322.
- Congregate participants: 1,771.
- Congregate meals served: 38,741.
- Protective services: 1,155.
- Crisis intervention cases: 269.
- Money management consumers: 59.
- State home care consumers: 2,215.
- Clinical assessment & evaluation screenings: 1,473.
- Total individuals served: 1,473.

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**Executive Office of Elder Affairs**

**Medicaid**

**Private Contracts**

**Project Income and Client Fees**

**Central Mass Agency on Aging**

**Funding and Donations**

**Grants and Appropriations**

**Commodity Foods - NSIP**

**Interest and Investment**

**Total**