

**TRI VALLEY, INC.**

*Home With You*

# 2020 Annual Report

*44 Years of Giving People*

**DIGNITY • INDEPENDENCE • CHOICE**

# *Fiscal Year 2020 Board of Directors*

## *Officers*

### *President*

Francis X. Small, Esq., Milford

### *1<sup>st</sup> Vice President*

Theodore A. Bartlett, Southbridge

### *2<sup>nd</sup> Vice President*

Josephine L. Veglia, Esq., Oxford

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### *Secretary*

Mary A. Falardeau, Brookfield

### *Past President*

Mary Lou Staples, Medway

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Barbara A. Clancy, Brookfield

Irene M. Garand, Sturbridge

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James E. Howard, Charlton

Ruth King, Spencer

Laurance S. Morrison, Sturbridge

Virginia Rapo, Southbridge

Kevin Rudden, Mendon

*This Annual Report is dedicated in memory of Ruth King who served for 15 years as a member of the Tri-Valley, Inc. Board of Directors.*

# *Message from the President & the Executive Director*

As we attempt to recollect the activities of the past twelve months, we realize that so much has changed. The pandemic that we have all managed to deal with has altered not only our individual lives but our way of life across the world. In March 2020, those services that were deemed essential to people's lives were defined. The supports offered by Tri-Valley, Inc. certainly fell into the category of essential—and in most cases, critical—to the health and well-being of the elders and people with disabilities that utilize our programs. While changes were made to our systems of operation to ensure the safety of both our consumers and our employees, we never closed our doors. Meals on Wheels deliveries not only continued but met the needs of more people who were struggling with food insecurity due to the lack of supplies, quarantine restrictions and a fear of leaving home. We worked closely with our provider partners to ensure that personal care needs continued to be prioritized, and that necessary PPE was available to prevent the spread of the virus. Technology upgrades were implemented to allow for new ways of communication and remote work, as upgrades and safety precautions were put in place within the building itself. It's funny to think that in January 2020 we had a handful of employees piloting a "Work At Home" model to see how it would go—and by mid-March, 75% of our employees were working remotely!

While the effects of COVID-19 continue to impact all of us, we are certain that our efforts have prepared Tri-Valley for whatever the future may hold. We have proven our resiliency and our ability to quickly change course and are proud of all that has been accomplished in the past year. We know that future challenges will be met head-on and successfully managed to allow our essential work to continue. Thank you for your ongoing support of Tri-Valley, Inc.



Elisabeth M. Prince  
Executive Director



Francis X. Small  
President

# *Support our Society*

In the fall of 2019, Tri-Valley, Inc. launched a new volunteer initiative, SOS (Supporting Our Society). SOS was designed to assist community members aged 60 and over or younger people with disabilities with projects not traditionally provided through home-based services such as: seasonal clean-up/yardwork, minor repairs/painting, gutter cleaning, wood stacking and window washing/light housekeeping.

The initial SOS event was held in the towns of Webster, Dudley and Oxford. Sixteen volunteers comprised of Tri-Valley staff/family members and a local contractor, assisted 18 households where the occupants had little or no supports to help them with chores to improve their home environment. One of the volunteers, Chad Whitcomb, who cleared limbs off a roof and cleaned gutters at the home of an elderly woman said, “she was happy and had tears ... that’s what counts to me—to let her know people still care.” Leo, whose home was overgrown with shrubs and vines, said, “I’m ecstatic, relieved from this big burden ... don’t know what else we would have done.” After another yard was cleared of leaves and debris, an elderly woman said, “Most wonderful thing in the whole world, and it is free!” Others who had window washing and minor repairs done expressed thanks with tearful eyes and grateful smiles.

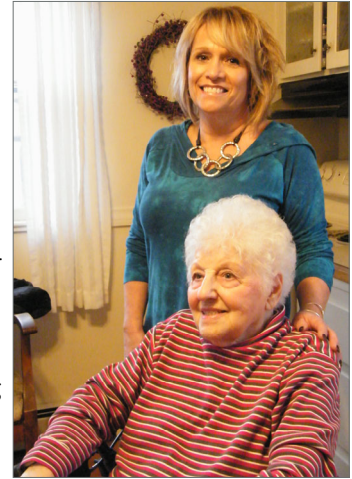


# Supporting our Society

Then came *Haircuts for the Holidays* with the coordinated volunteer efforts of four area hair-dressers who provided free haircuts to seniors who were unable to access a salon or barber. It doesn't matter what age you are, a new haircut can make you feel wonderful—Rolande of Webster was thrilled and delighted with her new look after she received a cut and set from Donna of Private Designs in Oxford. Clippin Tymes in Webster, Hair Mania in Franklin, Three Sisters Salon in Bellingham and Webster's Choice Barber also donated their time and services.

In March, COVID-19 restrictions brought changes to planned springtime cleanup activities involving community groups and local volunteers. Challenged to do something special for our home-

bound seniors, we partnered with Marsh & McLennan Insurance Agency and Stonehenge Gardens in Charlton resulting in the delivery of 800 healthy plants to seniors along with the Meals on Wheels deliveries. Meant to lift spirits, and just in time for Mother's Day, the project was conducted as part of our SOS volunteer initiative. Volunteers and employees delivered the plants that included tomato, lettuce, eggplant, pepper, basil and parsley. An uplifting poem and plant instructions were included in the delivery that was a delightful surprise and brought a little bit of sunshine to those who needed it most!



# *Foundation & Major Donor Support*

**Fiscal Year 2020 (July 1, 2019 – June 30, 2020)**

*(\$60,000 - \$96,000)*

Meals on Wheels America, National Council on Aging

*(\$30,000—\$40,000)*

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

*(\$10,000 - 15,000)*

Greater Worcester Community Foundation

John J. & Elizabeth M. Kunkel & Family Foundation, Inc., National Council on Aging/Walmart Foundation,  
United Way of Southbridge, Sturbridge & Charlton, Inc.

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

Fundación MAPFRE , MAPFRE USA Together We Give, CHNA 6, Katharine C. Pierce Trust, Customers of Terrazza - Franklin  
United Way of Webster & Dudley, Inc., Webster Five Foundation

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

Builders Systems, Inc., Checkwriters, Inc., Country Bank for Savings, Deborah & John Driscoll, EOS Foundation, Fallon Health, Gerald & Marilyn  
Fels, Irene Garand, David Gagnon, Marsh & McLennan Agency, Meals on Wheels America & Subaru of America, Inc., MetroWest Health  
Foundation, Quirk Wire Company, Inc., St. Vincent Community Healthcare Fund, United Way of South Central Massachusetts, Inc.

*(\$500 - \$999)*

Central Massachusetts Agency on Aging - Mini-Grant, Donald Ansley, Dudley Gendron Squadron 414 Sons, Franklin Federated Church – Mission  
Fund, Lynn Harris, Anne Kennedy, Melissa Mercon Smith, Medway Lions Club, Mary Lou Staples, Sutton Lions Club, Josephine Veglia

*(\$200 - \$499)*

Kalpana & Ravindra Acharya, Advanced Home Care Services, LLC., Bellingham Elder Service Group, Inc., Raymond Bussolari, Catholic Financial Life,  
Theodore Christensen, Barbara Clancy, Customers & Employees of Hannaford Supermarket, Dudley Nutrition Site, Fidelity Charitable Gift Fund  
Designated by James & Caren Noonan, Fidelity Charitable, Judith Manning, Anita Maurier, Carol Muschler, Premeer Real Estate, Inc.,  
Rotary Club of Uxbridge, Inc., Attorney Francis Small, Webster First Federal Credit Union Employees

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 2020 (July 1, 2019 – June 30, 2020)

## Community Services & Information:

Information & Resource Calls: 8,461  
 Options Counseling Consumers: 280  
 Healthy Aging Program Participants: 48  
 Congregate Housing Residents: 25  
 Resident Services Contacts: 1,637  
 Benefit Enrollment (BEC) Referrals: 502 BEC Consumers: 326  
 SNAP Application Assistance: 80

## Family Caregiver Support

Caregiver Counseling & Access Assistance: 112  
 Group Outreach & Education Participants: 1,607  
 Caregiver Scholarship Recipients: 40  
 Powerful Tools & Savvy Caregiver Participants: 27

## Mass Health Programs:

Adult Family Care Consumers: 229  
 Care Transition Consumers: 83  
 One Care Members: 226  
 Personal Care Attendant Consumers: 1,701  
 Senior Care Organization Members: 1,264

## Nutrition Services:

Meals on Wheels Consumers: 1,951 Meals Delivered: 238,556  
 Congregate Participants: 1,417 Congregate Meals Served: 29,440

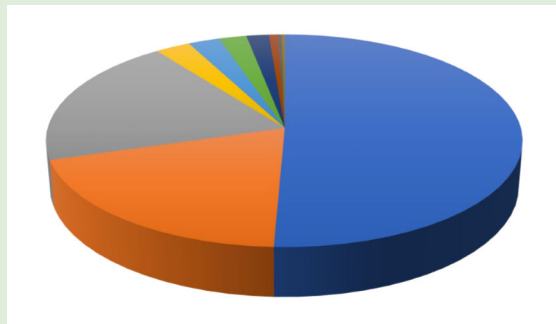
## Protective Services:

Protective Services Cases: 1,079  
 Crisis Intervention Cases: 236  
 Money Management Consumers: 58

## State Home Care:

State Home Care Consumers: 2,402  
 Clinical Assessment & Evaluation Screenings: 1,317

## Sources of Revenue Unaudited



Executive Office of Elder Affairs	\$13,302,290	50.7%
Medicaid	\$5,142,608	19.6%
Private Contracts	\$5,171,274	19.7%
COVID-19 Grants	\$701,451	2.7%
Central Mass Agency on Aging	\$627,900	2.4%
Project Income & Client Fees	\$554,407	2.1%
Fundraising and Donations	\$446,741	1.7%
Grants and Appropriations	\$177,863	0.7%
Commodity Foods - NSIP	\$76,193	0.3%
Interest and Investment	\$61,940	0.1%
<b>Total</b>	<b>\$26,262,667</b>	<b>100.00%</b>

Only 7.55% of total revenue went to the administration of Tri-Valley.



# *General Donations*

**Fiscal Year 2020 (July 1, 2019 – June 30, 2020)**

(\$100 - \$199)

Stuart & Elyse Auerbach, Richard Auger, Miriam Campbell, Bernard Chase III, Connect America/Be Safer at Home, Cornerstone Bank, Janet & Daniel Daigle, Jean Dalbec, Sandra Doane, Joan Dumas, Estate of Christine O'Brien, Gary & Janine Goldberg, David Glowka, Brian & Sandra Graeff, Dorothy Gravison, Beth Groccia, Harbro Sales & Service, Inc., James Howard, Bob Jenkins, Lauren Kasheta, Anjena Kuzdzal, Joseph LaPlante, Carolyn Lavallee, Daniel Leduc, Gail Leonick, Carla Loukota, Michael & Ann McCurdy, Lora & Jim Meyer, Laurance & Patricia Morrison, Douglas B. Mosher, Kathryn Nasinnyk, Edward Niedbala & Cheryl Leyden, Tom & Barbara O'Brien, Sam & Evelyn Pappas, Deanna Randall, John & Georgeanne Roe, Kevin Rudden, Saints Constantine & Helen Orthodox Church Philoptochos Society, Muriel Spear, Shirley Stockwell, Alvin Stone, Thornfield Hall, Matthew Tremble, Uxbridge Site Anonymous Donor, Verizon Foundation Designated by Edward Niedbala

(Up to \$99)

William Adamuska, John Alexander, Rebeca Alvarez, Beverly Anderson, Marilyn Banderet, Shirley Barnes, Theodore Bartlett, Calvin Bates, Gregory Bazinet, Rosalie Beals, Bek's Welding & Fuels, Inc., Joan Bernier, Paul & Beth Boutiette, Joanna Braley, Patricia Buzanoski, Suzanne Carty, Charles, Cathy & Matthew Ceppetelli, Loretta Chabot, Theresa & Kenneth Chad, Elaine Charlette, Kathleen & Peter Checkoway, April Chevalier, Simon Chiasson, Jr., Chelsea Collins, James Collins, Conseil Rochambeau-Brochu #12, Cormier Jewelers, Andrea Cutting, Lorraine & Jim DaDalt, Gary & Karen Dalessandro, Kathleen Daniels, Meaghan DeJong, Leonard DeLuca, Patrick Joseph DeMarco, Neil & Frances Denny, James Donaldson, Cathleen Donovan, Elaine Dunleavy, Jean & Richard Dupre, Phyllis Durand, Faheem & Mariam Farooq, Kelly Ferreira, Karol Foster, Linda Fraga, Meghan Francis, Betty Ann Gadoury, Mario Gala, Ann Garofalo, Gavitt Wire & Cable Company, Bernard Genga, Ellen Gevry, Theresa Giguere, Ann Marie Gonyea, Elizabeth Gonzalez, Betty Jean Gressak, Nicholas Groth, Evelyn Grovesteen, Mary Haddad, Laurel Henderson, Mary Anne Hickey, Wayne Hickey, Susan Hughes, Donna & Robert Ingraham, Mildred Jacques, James & Susan Kozlowski, Rochelle Jedrzynski, Danielle LaForce, Mary LeMarbre-McCulley, Suzanne & Thomas Lewandowski, Irene Lucier, Cecelia Majka, Claire Malkasian, Carol Manz, Angelo Marcos, Rocco Marino, Christine Marrier, Diane Mathurin, Kristin McCarthy, Tina & Ken Mead, Annette Mercado, Marsha Murray, Irene Nichols, Joy Nichols, Diana Palmer, Ronald & Marlene Patient, Jeff & Nancy Perry, Elaine Porter, Elisabeth (Lisa) Prince, Charles Proctor, Professional Medical Services, Inc., Gerard & Patricia Proulx, Betty Przypek, Karen Quaiel, Virginia Rapo, Bernice Rheau, Michelle Richard, Kim Rossi, Saint Agatha Sisters, Rosemary Salem, Donald & Janet Sayers, Scanlon Funeral Service, Inc., June Seagrave, Joyce Simpson, Sister Janette LaPlante & Lucille LaPlante's Children, Sitkowski & Malboeuf Funeral Home, Maureen Soto, Maureen St. Denis, Marianne Stefanyk, Zyon Stockley, Janina & Nancy Swiacki, Janice Swindell, John & Joyce Szeredy, Paul Tondorf, Sarah Tourtellotte, Lisa Vicario, Margaret Viens, Sadie Vivenzio, Walmart - Gardner, Brittany Walsh, Jamie Walsh, Katie Weaver, Suzanne Weise, Glory Zyskowski

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



# *Memorial & Tribute Donations*

## *- Donations in Memory of -*

Katherine Annese, Madhuri Bhachech, Shirley Barnes' Loved Ones, Paul & Louise Bonnette, Jeanette Bussolari, Margaret J. Cannell, Ruth Chiasson, Virginia & Joseph Chiuchiolo, Charles Christos, Madeline Credit, Helen Sobosik Daniels, Leo & Lena DeLuca, Linda Dirzius, Doreen Donaldson, Rabia Farooq, Elizabeth Flamand, Eva T. Grigas, Tom & John Jedrzynski, Elaine Josey, Ruth King, Lucille LaPlante, John L. Lapomardo, Dolores Lee, Charles Majka, Enoch Malkasian, Sophie & Vinnie Marsella, Geraldine Morrill, Lawrence & David O'Toole, Beatrice M. Parent, Mary Patrick, Bertha Reed, Gaylord Rheaume, Mary & Cliff Rivet, Evelyn & David Saucier, James D. Small, Lisa Spillane, Frederick J., Margaret C., Bobby, Fred A., Robert E. and Alice Tingley, Helen & Joseph Tondorf, Aldina Vicario, Lionel Vincent

## *- Donations in Honor of -*

Irene Garand, Sandy Graeff, Diane Mathurin, Mary & Cliff Rivet, For Services to The Town of Sutton, Jim Tremble

## *Special Thanks on Behalf of our Consumers*

AUBUCHON & PRICE CHOPPER, WEBSTER & BUILDERS SYSTEMS, INC. FOR SUPPORT OF SOS PROJECTS

BETTY ANN GADOURY, FOR LOVELY AFGHANS

THE CORNERSTONE QUILTERS OF CHARLTON, FOR BEAUTIFUL LAP ROBES

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

HAIRCUTS FOR THE HOLIDAYS:

CLIPPIN TYMES, HAIR MANIA, PRIVATE DESIGNS SALON, THREE SISTERS SALON, WEBSTER'S CHOICE BARBER

FRONT STEPS PROJECT PHOTOGRAPHERS:

BRIAN STONE, BRUCE BISHOP, MELISSA BORGESON & SUSAN BRAY



*Thank you to all of the community members who recognized our efforts by posting these signs on their lawns during COVID-19.*

# Tri-Valley Events, Outreach & Projects



*Tri-Valley outreach at Milford Health Fair, Fall 2019.*



*Front Steps Photo Project to benefit Meals on Wheels.*



*Preparation for Tri-Valley's 2019 Winter Food Project.*



*Long Subaru participated in the Subaru Share the Love Event in November 2019 helping to raise funds for Meals on Wheels.*



*Tri-Valley staff with thankful smiles for the 2019 Terrazza Giving Tree Project that helps so many consumers in need.*

# Staffing and Volunteers

## 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 2020, Tri-Valley had 115 full-time employees, 43 part-time employees and 54 substitute/per diem employees for a total of 212 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.



*Richard Provost of Upton received the 2019 George Wild Award for outstanding volunteer service for Tri-Valley's Nutrition Program. Nominations came from the 11 nutrition sites. (l-r) Kristin McCarthy, Nutrition Director, Richard Provost, Tom Andrade, Nutrition Supervisor and Al Vatour, Nutrition Center Coordinator.*



*Janet Daigle, Nurse Manager, was the proud recipient of the 2019 Marilyn L. Travinski Award for Excellence. Nominations for this prestigious award come from staff members with review and final decision by the Board of Directors. (l-r) Lisa Prince, Executive Director, Janet Daigle, RN, and Francis X. Small, President of the Board of Directors.*



## *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 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 & Worcester, and the *Personal Care Attendant Program also serves:* Auburn, Holliston, Hopkinton, Leicester, Marlboro, Millbury, Millis, Norfolk, Northboro, Southboro, Westboro, Worcester & Wrentham.  
*Benefits Enrollment Services are available in all 61 communities of Central Massachusetts.*