



Tri-Valley
HOME WITH YOU

2021 Annual Report

45 Years of Giving People

DIGNITY • INDEPENDENCE • CHOICE

Fiscal Year 2021 Board of Directors

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Kevin Rudden, Mendon

** Left during Fiscal Year 2021*

This Annual Report is dedicated in memory of Harold D. Gould, Jr., Esq., who served for 23 years as a member of the Tri-Valley, Inc. Board of Directors.

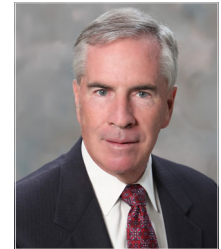
Message from the President

As this Annual Report is finalized, I will end my final term as President of the Board. The past eight years have been filled with change—exiting Board Members, change in Executive Staff at Tri-Valley and my own retirement from my long career in law. I have come to realize that change is hard. This has never been more true as the pandemic caused a full pivot in our day to day lives.

As I've been engaged in the programs and services of Tri-Valley I can honestly say that I couldn't be prouder of the people who work here, the consumers who benefit from the services and supports, and the plans for the future to enhance and improve these mission-centric models.

Throughout the pandemic, Tri-Valley never closed its doors. No services were stopped and no one who needed help was turned away due to COVID-19. While the workforce shortage is now causing disruptions and delays in needed services, Tri-Valley is working on new and creative partnerships to help providers recruit new professionals to the area of homecare and to fill internal vacancies with qualified people.

While this agency looks different, and operates differently, than it did when I took on the role of President, the mission remains the same. Some things haven't changed after all.



Francis X. Small
President

45 Years

A New Look for Tri-Valley Inc.!



- Incorporated on June 10, 1976 as The Elderly Home Care Corporation of Southern Worcester County, Inc., the agency began its mission of service to elders age 60 and over.
- In 1983, the corporation name was changed to Tri-Valley Elder Services, Inc. “Tri-Valley” representing the three valleys of the 25-town area of service.
- In 2005, the corporate name was shortened to Tri-Valley, Inc. with the addition of a tag line, “Home With You” to welcome our newer consumers, younger people with disabilities and caregivers.
- On June 10, 2021, Tri-Valley, Inc. celebrated its 45th Anniversary with a new look and logo representing continuing growth of services and depth of support to our diverse population.

“We are pleased to carry on in the celebration of Tri-Valley’s long history of meeting the needs of those we support, working in collaboration with others and expanding the vision of **Home With You** far into the future” Elisabeth M. Prince, Executive Director/CEO

Tri-Valley Community Activities



Thanksgiving baskets from Webster Manor



The 2020 Terrazza Giving Tree Project helped many of our neediest consumers



Spencer Community Development Block Grant Food Distribution



Tri-Valley's 45th Anniversary!



Long Subaru helped raise funds for Meals on Wheels through the Subaru Share the Love Event



Tri-Valley staff walked to raise awareness of Falls Prevention

Foundation & Major Donor Support

Fiscal Year 2021 (July 1, 2020 – June 30, 2021)

(\$50,000—100,000)

Metropolitan Area Planning Council, National Council on Aging, Town of Spencer Community Development Block Grant

(\$10,000 - 20,000)

Greater Worcester Community Foundation

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

United Way of South Central Massachusetts, Inc.

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

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

Customers of Terrazza - Franklin, Katharine C. Pierce Trust,

Webster Five Foundation

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

BankHometown, Customers & Employees of Hannaford Supermarket, Gerald & Marilyn Fels, Helping Hands of America,

Meals on Wheels America-Subaru Share the Love Event, *Meals on Wheels America-Meals on Wheels Loves Pets*,

Town Fair Tire Foundation, Inc.

(\$500 - \$999)

Baba Sushi Sturbridge, Deborah & John Driscoll, Fidelity Charitable Gift Fund Designated by Anne Kennedy, Franklin Federated Church – Mission

Fund, Suzanne Gendreau, Lynn Harris, Daniel Leduc, Medway Lions Club, Josephine Veglia, Webster First Federal Credit Union

(\$200 - \$499)

Bellingham Elder Service Group, Inc., Kathleen Bentley, Catholic Financial Life, Theodore Christensen, Barbara Clancy, Rosemarie DeGaetano, Friends of the North Brookfield Council on Aging, Inc., Friends of the Sutton Elders, Dorothy Gravison, Beth Groccia, Hopedale Friends of Elders, Inc., Lorraine Lavoie, Judith Manning, Anita Maurier, Milford Lions Club, Wendy Philippi, Pirperis, Inc. DBA DQ Grill & Chill, Deanna Randall, Carol Reichardt, Rotary Club of Uxbridge, Inc., Attorney and Mrs. Francis Small, Melissa Mercon Smith, Mary Lou Staples, Sutton Lions Club, Sutton Nutrition Site, The Woodshed Gallery, LLC.

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 2021 (July 1, 2020 – June 30, 2021)

Community Services & Information:

Information & Resource Calls: 8,656

Options Counseling Consumers: 224

Congregate Housing Residents: 17

Resident Services Contacts: 1,150

Benefit Enrollment (BEC) Referrals: 328 BEC Consumers: 241

Family Caregiver Support

Caregiver Counseling & Access Assistance: 112

Group Outreach & Education Participants: 1,464

Caregiver Scholarship Recipients: 59

Powerful Tools & Savvy Caregiver Virtual Participants: 10

Mass Health Programs:

Adult Family Care Consumers: 208

Care Transition Consumers: 76

One Care Members: 201

Personal Care Attendant Consumers: 1,734

Senior Care Organization Members: 1,350

Nutrition Services:

Meals on Wheels Consumers: 1,977 Meals Delivered: 251,307

Congregate Participants: 539 Congregate Meals Served: 8,175

Protective Services:

Protective Services Cases: 1,126

Crisis Intervention Cases: 282

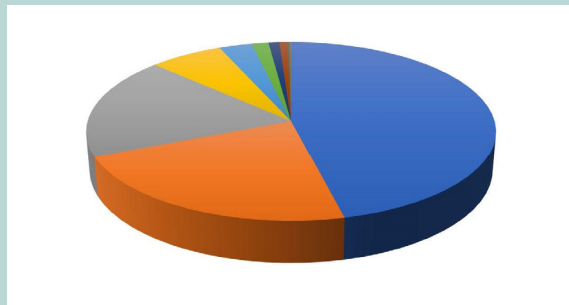
Money Management Consumers: 61

State Home Care:

State Home Care Consumers: 2,349

Clinical Assessment & Evaluation Screenings: 1,162

Sources of Revenue Unaudited



Executive Office of Elder Affairs	\$12,765,202	46.3%
Private Contracts	\$6,182,245	22.4%
Medicaid	\$5,081,700	18.4%
COVID-19 Grants	\$1,799,199	6.5%
Central Mass Agency on Aging	\$799,934	2.9%
Fundraising and Donations	\$416,484	1.5%
Project Income and Client Fees	\$265,288	1.0%
Grants and Appropriations	\$189,844	0.7%
Commodity Foods - NSIP	\$54,136	0.2%
Interest and Investment	\$38,417	0.1%
Total	\$27,592,448	100.00%

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

General Donations

Fiscal Year 2021 (July 1, 2020 – June 30, 2021)

(\$100 - \$199)

Kalpana & Ravindra Acharya, Donald Ansley, David & Lori Baril, Shirley Barnes, John & Valerie Barrows, Baystate Wing Memorial Hospital Pharmacy Staff, Raymond Bussolari, Malcolm & Joyce Cameron, Bernard Chase III, James Collins, Conseil Rochambeau-Brochu #12, Cormier Jewelers, Janet & Daniel Daigle, Jean Dalbec, Heather Demick, Sandra Doane, Denise Duffee, Regina Ferrera, Denise Flynn & The Flynn Girls, Karol & Bob Foster, Edson Gebo, Brian & Sandra Graeff, James Howard, Bob Jenkins, Kimberly Kelley, Knights of Columbus Council #118, Carolyn Lavallee, Rocco Marino, Michael & Ann McCurdy, Russell McLean, Lora & Jim Meyer, Carol Muschler, Edward Niedbala, Tom & Barbara O'Brien, Kellie O'Keefe, Evelyn Pappas, Bancroft & Mary Poor, Elaine Porter, Anil & Diane Prasad, Bernice Rheume, Saints Constantine & Helen Orthodox Church Philoptochos Society, Dr. Marie Sandoli & Annie, Paul Tondorf, Marilyn Travinski, Uno Sturbridge, Verizon Foundation Designated by Edward Niedbala, Margaret Viens, Woman in Business, Inc., Buddy Wong

(Up to \$99)

Aucoin Ryan Reality, Stuart & Elyse Auerbach, Richard Auger, Paul Babbitt, Theodore Bartlett, Rosalie Beals, Mary Bellizzi, Patricia Berard, Bonnie Berthiaume, Barbara Bessette, Theresa Blake, Joan Boyd, Robert & Joannah Brunelli, Juan Carrillo, Louise Carter, Ellen Cenedella, Loretta Chabot, Theresa & Kenneth Chad, Simon Chiasson, Jr., Lucille Ciampa, Samantha Ciufu, Edward & Beth Dabrowski, Lorraine & Jim DaDalt, Bert & Donna Dansereau, Edward & Genevieve DeHaan, Neil & Frances Denny, James Donaldson, Joan Dumas, Ernest Duquette, Faheem Farooq, Kristine Fontaine, Irene Gadbois, Betty Ann Gadoury, Mario Gala, Bernard Genga, Theresa Giguere, Linda Gould, Aurore Hamelin, Robert & Suzanne Hanson, Claire Harding, Karen Harney, Laurel Henderson, Ann Hurley, Mildred Jacques, Rochelle Jedzynski, Janet Jenkins, Joan & Ronald Kokernak, Rosalie Kubiak, Sheryl L'Ecuyer, Linda & Marjorie Lapierre, Janette & Joseph LaPlante, Suzanne Lewandowski, Irene Lucier, Cecelia Majka, Claire Malkasian, Carol Manz, Angelo Marcos, Mass Audubon's Drumlin Farm Community Preschool, Michelle Masse, John & Rosemary Mazzone, Dave Miles, Marsha Murray, Peter & Madeline Nawrocki, Theresa & David Oriol, Dorothy Pedrol, Jeff & Nancy Perry, Charles Proctor, Professional Medical Services, Inc., Gerard & Patricia Proulx, Mia Pruett, Karen Quaiel, Norma Rannigan, Virginia Rapo, Raymond & Nancy Rheault, Colleen & Denis Richardson, Scanlon Funeral Service, Inc., Angelo & Cynthia Scola, Sitkowski & Malboeuf & Hickey Funeral Home, Caryn Slotsky, Deborah Smith, Genevieve Strakosz, Mr. & Mrs. Edward Swanson, Janina & Nancy Swiacki, Janice Swindell, Joyce Szeredy, Beverly Thompson, Uxbridge Nutrition Site, Harriet Van Dyke, Lisa Vicario, Suzanne Walmsley, Ian Webster & Family, Suzanne Weise, Debra Young, Michele Young, Susan Zeh, Glory Zyskowski

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

Memorial & Tribute Donations

- Donations in Memory of -

Beatrice Andrews, Katherine Annese, Robert Tucker Bain, Jr., Madhuri Bhachech, Shirley Bonnell, Paul & Louise Bonnette, Jeanette Bussolari, Ruth Chiasson, Virginia & Joseph Chiuchiolo, Charles Christos, Bill & Betty Collins, Madeline Credit, Lauria Daubney, Doreen Donaldson, Anne Doucette, Norman Dumas, Rabia Farooq, Robert Gadbois, Mary Goggin, Eva T. Grigas, Mary Huckins, Thomas & John Jedrzynski, Dr. Robert Kirk, Lucille LaPlante, John L. Lapomardo, Charles Majka, Enoch Malkasian, Sophie & Vinnie Marsella, Alfred Mathurin, Honey Meyer, Geraldine Morrill, Fred Muschler, Judy Vaundell Myers, Julia Olson, Lawrence & David O'Toole, Mary Patrick, Richard Pedroli, Sr., Grace Proctor, Gaylord Rheaume, Mary & Cliff Rivet, Chester Sinkus, James D. Small, Lisa (Howard) Spillane, Deceased members of the Tingley Family, Anna Thibault, Helen & Joseph Tondorf, Lionel Vincent, Edmund (Ned) Warren

- Donations in Honor of -

Katherine Annese, Laura Black Silver, Phyllis Esslinger, Irene Garand, Mary (Sissy) Goggin, Carolyn Motuzas, Harry Murphy, Lorraine & Eddy Ostrokolowicz, Mr. & Mrs. Rama Prasad, Denise Rizzoli, Donna Rudolph, Marilyn L. Travinski, Aldina Vicario

Special Thanks on Behalf of our Consumers

BETTY ANN GADOURY, FOR LOVELY AFGHANS
BIG BUNNY MARKET, FOR ASSISTANCE WITH OUR WINTER FOOD PROJECT
THE CORNERSTONE QUILTERS OF CHARLTON, FOR BEAUTIFUL LAP ROBES
TERRAZZA'S OF FRANKLIN, FOR THEIR GIVING TREE PROJECT
WEBSTER MANOR, FOR THANKSGIVING BASKETS



26th Annual Winter Food Project



During Covid-19, it was especially important to continue our seasonal tradition assisting those facing food insecurity and loneliness. The FY2021 project helped 331 elderly consumers and younger people with disabilities—each received two reusable shopping bags filled with non-perishable entrees, hearty soups and stews, canned meats and fish, fruits and vegetables as well as cereal, crackers, peanut butter and other staples. The Winter Food Project is an uplifting tradition at Tri-Valley that means a great deal to our frail and needy consumers and our entire staff who are involved in the production and delivery.

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 2021, Tri-Valley had 123 full-time employees, 45 part-time employees and 53 substitute/per diem employees for a total of 221 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.



During COVID-19, Meals on Wheels continued with a revised approach of contact-free delivery, sanitizing and mask-wearing. Tri-Valley is proud and thankful for all volunteers and staff who continued to find ways to do their jobs and deliver services safely during these challenging times.



Jim Fitzgibbons, SHC Care Manager, was the proud recipient of the 2020 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.



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.