



Tri-Valley
HOME WITH YOU

2022 Annual Report

46 Years of Giving People

DIGNITY • INDEPENDENCE • CHOICE

Fiscal Year 2022 Board of Directors

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Brian J. Perry, Webster

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Theodore A. Bartlett, Southbridge

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Francis X. Small, Esq., Milford

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George Acquah-Mensah, Dudley

Gregory Bazinet, Webster

Barbara A. Clancy, Brookfield

Evelyn Grovesteen, Dudley

James E. Howard, Charlton

Marion Rood, Oxford

Kevin Rudden, Mendon*

Mary Lou Staples, Medway

** Left during Fiscal Year 2022*

This Annual Report is dedicated in honor of Barbara O'Brien who retired after 38 years as a valued member of Tri-Valley, Inc.

Message from the President

I am completing my first year as President as this Annual Report is finalized. It is never easy to fill the shoes of one's predecessors. Francis X. Small of Milford and Mary Lou Staples of Medway have been great mentors and I wish to thank them for their support and service to Tri Valley, Inc. Our Board membership has increased this year with the election of three new Board members, George Acquah-Mensah of Dudley, Francis White of Spencer, and Dona Marie Son of Mendon. Welcome to each of you.

Tri Valley, Inc. is in a strong financial condition as you will read in later pages of the Annual Report. I would like to recognize and thank the Foundations and Major Donors who supported Tri Valley, Inc. throughout the year. No less important are the many small donors also listed in the Annual Report who give to say Thank You or as a Memoriam in the name of a loved one, or give because they recognize that Tri Valley, Inc. is a vital provider of services to older adults, caregivers, and younger people with disabilities in their community. Let me say Thank You to you! And a special thank you for a grant from the Greater Worcester Community Foundation to purchase a white Ford van with Tri Valley lettered on its sides. You'll see it on the road as it travels to our nutrition sites, senior centers, outreach events and training programs.

Inflation, especially the rising cost of food and energy, will have the greatest impact in 2023 on Tri Valley, Inc.'s operating budget, our employees, our vendors and contractors, and, my biggest concern, our consumers on fixed income. We survived Covid-19, no services were stopped and no one who needed help was turned away. We intend to face inflation with the same resolve. We do not want consumers choosing between food and heat, electric light or medication. If you are having trouble paying a utility bill or need help with food or housing assistance call Tri Valley, Inc. for support or dial 211 for information where you can get help. Please check in with your parents, friends, or neighbors. Make sure they are warm and safe this Winter.



*Brian J. Perry
President*

New Programs

More to offer with Tri-Valley Inc.

Elder Mental Health Outreach Team

Tri-Valley, Inc.'s Elder Mental Health Outreach Team provides behavioral health support in underserved communities. Our goal is to advance the health and well-being of older adults by offering timely, flexible access to behavioral and mental health services to live healthier lives.

Tri-Valley's OST Program

With grant funding from the United Way of South Central MA, our Office Support Team was created. Five students from surrounding high schools—Paige, Hannah, Lucas, Leysha and Jordan— were hired for a six-week period. They engaged with the training library, completed Dementia Friends training, and spent time in each department. The five students were recognized for their completion of this program with a “graduation” celebration.



Happy Retirement!



Barbara O'Brien retired in July 2022 after decades of service. Barbara's legacy included the new logo design for our 45th anniversary. Thank you again and again for your dedication, grace, and hard work.

**Congratulations on
38 years!**

The new Tri-Valley van!

Thanks to a grant from the Greater Worcester Community Foundation, we will now be able to share information about the amazing programs of Tri-Valley in a new way. You'll soon see it on the road to our nutrition sites, senior centers, outreach events and training programs.



Outreach Services for Veterans and their Families

This grant, funded by MA Department of Veterans' Services, provides education, support and connection to community resources and benefits for those who served in the U.S. Armed Forces, Reserve, or National Guard, and their immediate family members.

Tri-Valley Community Activities



Tri-Valley staff walked to raise awareness of Breast Cancer



2022 March for Meals raffle prizes



Tri-Valley staff supporting a Soup & Sandwich luncheon at the Spencer Senior Center



The 2021 Terrazza Giving Tree Project helped many of our neediest consumers



Tri-Valley's Cornhole Tournament



Thanksgiving baskets from Webster Manor

Foundation & Major Donor Support

Fiscal Year 2022 (July 1, 2021 – June 30, 2022)

(\$100,000—150,000)

National Council on Aging, Commonwealth of Massachusetts Department of Veterans' Services,
Massachusetts Councils on Aging

(\$50,000—999,999)

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

(\$10,000 - 49,999)

Customers of Terrazza, John J. & Elizabeth M. Kunkel & Family Foundation, Inc., Katherine C. Pierce Trust,
Greater Worcester Community Foundation, United Way of South Central Massachusetts,
Wells Foundation, Mapfre, Pioneer Valley Planning Commission

(\$1,000 - \$9,999)

Fire & Iron Motorcycle Club, Sutton Lions Club, Unibank for Savings, The Adella Giller Charitable Trust,
United Health Care, Subaru *Share the Love*, Webster Five Foundation

(\$500 - \$999)

Dorothy A. Burke, Catholic Financial Life, Barbara Clancy, Medway Lions Club, Deborah & John Driscoll,
Dudley Gendron Post 414A L., Fidelity Charitable Designated by Anne Kennedy, Friends of the Northbridge Elders,
Lynn Harris, Amy & Christopher Matherly, Anita Maurier, John & Georgeanne Roe,
Customers & Employees of Hannaford Supermarket, Josephine Veglia

(\$200 - \$499)

Bellingham Elder Service Group, Inc., The Blackbaud Giving Fund, Theodore Christensen, Coastline Elder Services, Inc.,
Rosemarie DeGaetano, First Congregational Church of Dudley, Friends of The Sutton Elders, Inc., Beth Groccia, Debora & Alfred Langevin, Lorraine Lavoie, Roger & Jo Maloof, Madeline Nawrocki, Edward Neidbala & Cheryl Leyden, Evelyn Pappas,
Rotary Club of Uxbridge, Inc., Helen Trimble, Webster First Federal Credit Union, 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 2022 (July 1, 2021 – June 30, 2022)

Community Services & Information:

Information & Resource Calls: 9,189

Options Counseling Consumers: 167

Congregate Housing Residents: 22

Resident Services Contacts: 730

Benefit Enrollment (BEC) Referrals: 448 BEC Consumers: 411

Family Caregiver Support

Caregiver Counseling & Access Assistance: 399

Group Outreach & Education Participants: 780

Caregiver Scholarship Recipients: 67

Mass Health Programs:

Adult Family Care Consumers: 212

Care Transition Consumers: 23

One Care Members: 172

Personal Care Attendant Consumers: 1,743

Senior Care Organization Members: 1,428

Nutrition Services:

Meals on Wheels Consumers: 2,014 Meals Delivered: 230,887

Congregate Participants: 806 Congregate Meals Served: 30,160

Protective Services:

Protective Services Cases: 1,279

Crisis Intervention Cases: 312

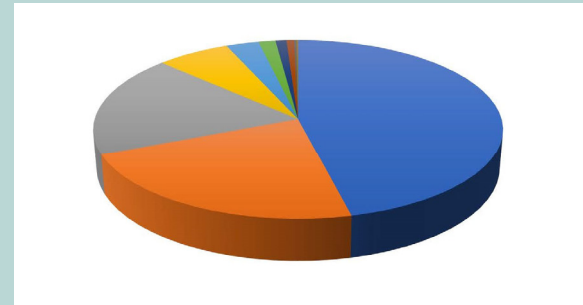
Money Management Consumers: 75

State Home Care:

State Home Care Consumers: 2,376

Clinical Assessment & Evaluation Screenings: 1,095

Sources of Revenue Unaudited



Executive Office of Elder Affairs	\$14,149,421	47.5%
Private Contracts	\$5,629,526	18.9%
Medicaid	\$5,429,808	18.2%
COVID-19 Grants	\$1,635,000	5.5%
Central Mass Agency on Aging	\$1,232,666	4.1%
Fundraising and Donations	\$520,727	1.7%
Project Income and Client Fees	\$519,590	1.7%
Grants and Appropriations	\$260,378	0.9%
Commodity Foods - NSIP	\$25,017	0.0%
Interest and Investment	\$385,699	1.3%

Total **\$29,787,830** **100.00%**

Only 6.17% of total revenue went to the administration of Tri-Valley.

General Donations

Fiscal Year 2022 (July 1, 2021 — June 30, 2022)

(\$100 - \$199)

Kalpana & Ravindra Acharya, Evelyn Grovesteen, Shirley Barnes, Theodore Bartlett, Jennifer Batchelder, Barbara Charles, Janet & Daniel Daigle, Jean Dalbec, Kristine Fontaine, Edson Gebo, Marguerite Gaddis, Irene Garand, Suzanne Gendreau, Brian & Sandra Graeff, Blake Kuzdzal, Lorraine Lavoie, Daniel Leduc, James Lennon, Amy Litman, Benjamin Marinelli, Pamela Merchant, Lora & Jim Meyer, Betty Prypek, Bernice Rheume, Saints Constantine & Helen Orthodox Church Philoptochos Society, Mary Lou Staples, Stop & Shop, Margaret Viens, Madeline Nawrocki, Sue Koziak, Robert Downie.

(Up to \$99)

Tammie Alves, Bethzaida Amado, Lester-Else Apicella, Aucoin Ryan Realty, Stuart & Elyse Auerbach, Richard Auger, Diane Mathurin, Gregory Bazinet, Robert Bishop, Paul & Joanne Bruell, Loretta Chabot, Theresa & Kenneth Chad, Simon Chaisson, Jr., James Collins, Neil & Frances Denny, James Donaldson, Faheem Farooq, Marc & Janice Fornaciari, Betty Ann Gadoury, Andrew & Susan Gala, Jr., Laurel Henderson, Mary Holmes, Mildred Jacques, Rochelle Jedrzynski, Joan & Ronald Kokernak, Jeanne Koziak, Richard B. Koziak, Anna & Edward Kudron, Joseph E. LaPlante, Lorraine Lavoie, John Letourneau, Suzanne Lewandowski, Irene Lucier, Claire Malkasian, Rocco Marino, Michelle Masse, Aunt Helen Niedbala, Evangelia Panagiotou, Adrienne Plasse, Gerald & Patricia Proulx, Elaine Porter, Virginia Rapo, Robert & Joannah Brunelli, Francis & Deborah Small, Kara Stewart, Janina & Nancy Swiacki, Marilyn Travinski, Mairgreed Gray, Jeanette Laplante, Paul Tondorf, Tom & Barbara O'Brien, Rosalie Beals.

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

Memorial & Tribute Donations

Robert Gadbois, Mary Goggin, Enoch Malkasian, Lionel Vincent, Yvonne Mathurin, Susan Koziak, Audrey Bacon, Nancy Barilone, Madhuri Bhachech, Rabia Farooq, Irene Garland, Eva T. Grigas, Thomas & John Jedrzynski, John Edward Kokernak, Lorraine Langevin, Janette T. LaPlante, John L. Lapomardo, Lawrence & David O'Toole, Irene Lucier, Honey Meyer, Helen Niedbala, Gaylord Rheume, Tom Griffin, The Volunteers.

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
BLESSED BACKPACK BRIGADE
BENJAMIN MARINELLI, BIG BUNNY MARKET, DELRAY DOC'S, JOE & CANDICE DIAZ,
LINDSEY YASKOSKI, MIKE & RUTH PELLEGRINO, MISSY'S DOG DAY SPA, AND
ALLISON STEPPIC AT OAKRIDGE CREATIONS FOR THEIR CONTRIBUTIONS
TOWARDS THE CORNHOLE TOURNAMENT



27th Annual Winter Food Project



During Covid-19, it was especially important to continue our seasonal tradition assisting those facing food insecurity and loneliness. The FY2022 project helped 340 older adults 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 2022, Tri-Valley had 133 full-time employees, 48 part-time employees and 43 substitute/per diem employees for a total of 224 staff members.

Volunteers

The helping hands and caring hearts of over 300 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.



Susan Webster, PCA Manager, was the proud recipient of the 2021 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 older adults 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 300 volunteers.

Mission Statement

The Mission of Tri-Valley, Inc. is to promote and maintain an optimal level of independence, dignity and well-being for older adults, individuals with disabilities and all others served by our programs, by providing information, advocacy to address individual needs and social inequities, and access to high quality, culturally sensitive 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.

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