



Tri-Valley
HOME WITH YOU

2023 Annual Report

47 Years of Giving People

DIGNITY • INDEPENDENCE • CHOICE

Fiscal Year 2023 Board of Directors

Officers

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Brian J. Perry, Webster

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Theodore A. Bartlett, Southbridge

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James E. Howard, Charlton

Marion Rood, Oxford

Dona Son, Mendon

Mary Lou Staples, Medway*

Francis X. Small, Milford*

Francis White, Spencer

** Left during Fiscal Year 2023*

*This Annual Report is dedicated in honor of Mary Lou Staples and Fran Small who
both served as President of the Board of Directors at Tri-Valley, Inc.*

Message from the President

In the U.S., about 10,000 baby boomers turn 65 every day. By 2030 more people in the United States will be older than age 65 than younger than age five. If you heard the phrase "It takes a village to raise a child" then you can imagine what it takes to care for so many seniors.

Here at Tri Valley, Inc. it is our mission to help 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. Our goal is to make it easier for you to find solutions and access appropriate services. You can rely on our knowledgeable and professional staff to be your "village." Call us!

Inflation, especially the rising cost of food and energy, will have the greatest impact in 2024. 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 on where you can get help. Please check in with your parents, friends, and neighbors. Make sure they are warm and safe this Winter.

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. More than 300 volunteers partner with Tri Valley, Inc. to deliver meals, provide Money Management, assist with office work and special events. Let me say *Thank You* to you!



*Brian J. Perry
President*

More to offer with Tri-Valley, Inc.

Veterans' Outreach Program

In partnership with Whittier Farms in Sutton, Tri-Valley's Veterans' Outreach Program provided Veterans and their families with two bags of farm fresh produce throughout the summer.



Cuidando Con Respeto

The first ever "Cuidando con Respeto", (Caring with Respect) workshop was held in the Tri-Valley service area. The Tri-Valley trained leaders were able to share their knowledge with a group of 17 Hispanic caregivers. The caregivers were appreciative of the strategies they learned to better care for their loved ones with Alzheimer's Disease and Related Dementias.



Behavioral Health Services

Tri-Valley's Elder Mental Health Outreach team went into the community with their Mental Wellness Programs that include: Rhythmic Music, Baking Support, Mindfulness Meditation, and Relaxation Art.

Tri-Valley Community Activities



Tri-Valley's Resource Fair and Vaccine Clinic provided 47 community members a covid vaccine and a Cumberland Farms gift card



Tri-Valley staff at the North Brookfield Spookfest



Through Subaru's Share the Love event Tri-Valley partnered with Long Subaru who donates to Meals on Wheels



The 2022 Terrazza Giving Tree Project helped many of our neediest consumers



Tri-Valley staff on their annual walk for Falls Prevention Awareness 2022



Fire and Iron M/C Station 128 donating to the Winter Food Project

Foundation & Major Donor Support

Fiscal Year 2023 (July 1, 2022 – June 30, 2023)

(\$1,000,000+)

Executive Office of Health and Human Services

(\$150,000—500,000)

MassDevelopment, Greater Worcester Community Foundation

(\$100,000—149,999)

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

United Way of South Central Massachusetts, Massachusetts Councils on Aging

(\$50,000—99,999)

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

National Council on Aging, Home Care For All

(\$10,000 - 49,999)

Customers of Terrazza, John J. & Elizabeth M. Kunkel & Family Foundation, Inc.,

Katherine C. Pierce Trust, Central Massachusetts Regional Planning Commission,

G. Wells Foundation, Office of Economic Empowerment

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

Dexter-Russell, Inc., Dorothy Timm, Commonwealth Cooperation, Subaru *Share the Love*,

Massachusetts Cultural Council, Sutton Lions Club Foundation, Inc., UniBank, Webster Five

(\$500 - \$999)

John Driscoll, Dorothy Gravison, Hannaford Uxbridge Grocery & Pharmacy,

Medway Lions Club, John & Georgeanne Roe, Will Tsang

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 2023 (July 1, 2022 – June 30, 2023)

Community Services & Information:

Information & Resource Calls: 17,712 Options Counseling: 358
 Congregate Housing Residents: 26 Resident Services: 1,207
 Benefit Enrollment (BEC) Referrals: 590 BEC Consumers: 337
 Elder Mental Health Outreach Referrals: 163
 Veterans Outreach Grant Referrals: 219
 Veterans Supported under Veterans' Outreach Grant: 200

Family Caregiver Support

Caregiver Counseling & Access Assistance: 457
 Group Outreach & Education Participants: 1,249
 Caregiver Scholarship Recipients: 87

Mass Health Programs:

Adult Family Care Consumers: 205
 Care Transition Consumers: 47
 One Care Members: 214
 Personal Care Attendant Consumers: 1,795
 Senior Care Organization Members: 1,479

Nutrition Services:

Meals on Wheels Consumers: 2,079 Meals Delivered: 251,080
 Congregate Participants: 863 Congregate Meals Served: 30,889

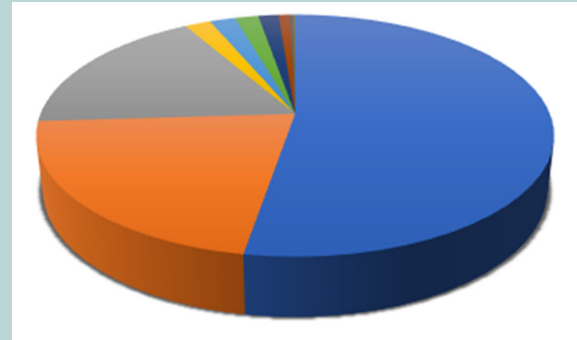
Protective Services:

Protective Services Cases: 1,422 Crisis Intervention Cases: 301
 Money Management Consumers: 88
 Advocacy & Navigating Care in the Home with Ongoing Risks: 20

State Home Care:

State Home Care Consumers: 2,400
 Clinical Assessment & Evaluation Screenings: 1,157

Sources of Revenue



Executive Office of Elder Affairs	\$15,409,594	52.7%
Private Contracts	\$6,248,423	21.4%
Medicaid	\$5,167,629	17.7%
Grants and Appropriations	\$561,448	2.1%
Fundraising and Donations	\$556,850	1.9%
Project Income and Client Fees	\$510,087	1.9%
Central Mass Agency on Aging	\$440,855	1.5%
Miscellaneous	\$244,352	0.8%
Interest & Investment	\$88,554	0.3%
Commodity Foods - NSIP	\$26,812	0.1%

Total **\$29,254,604** **100.00%**

Only 8.19 % of total revenue went to the administration of Tri-Valley.

General Donations

Fiscal Year 2023 (July 1, 2022 – June 30, 2022)

(\$200 - \$499)

Kalpana & Ravindra Acharya, Bellingham Elder Service Group, Inc., Jared Bowen, Chapter NO12 Match Fund,
Theodore Christensen, Barbara Clancy, Fidelity Investments, Beth Groccia, Helping Hands of America,
Lorraine Lavoie, Evelyn Pappas, Melissa Mercon Smith, Sutton Nutrition Site.

(\$100 - \$199)

Gregory Bazinet, Big Y Supermarket, Bernard Chase III, Helping Hands, Jean Dalbec,
Rosemarie Degaetano, Friends of Sutton Elders, Inc., Gary & Janine Goldberg, Brian & Sandra Graeff,
James Howard, John & Sherry Kapanke, Debora & Alfred Langevin, Daniel Leduc,
Lynne & Keith Kapanke, Paul Manganelli, Anita Maurier, Jeffrey Perry, Bernice Rheaume,
Stop & Shop Supermarket, Saints Constantine & Helen Orthodox Church Philoptochos Society,
Margaret Viens, Joan & Paul Zumpfe.

(Up to \$99)

Michaelyn Albrizio, Theodore Bartlett, Rosalie Beals, Paula Bradley, Susan & Thomas Caronia,
Simon Chiasson, Jr., Union St. Jean Baptiste, Linda Conz, Amanda Cournoyer, Virginia A Desjourdy,
Alfred & Linda Dion, James Donaldson, Robert Downie, Faheem Farooq, Friends of Pearle L Crawford,
Patty Frobisher, Betty Ann Gadoury, Mairgreed Gray, Martha Henry, Mildred Jacques, James Justice,
Donald R Kiley, Joan & Ronald Kokernak, Beth & John Kosciak, Anthony Labella, Karen Leeds,
Denise Mason, Michelle Masse, Helen McDonald, Mary McDonald, Marsha Murray, Elaine Porter,
Elisabeth Prince, Virginia Rapo, Linda & Greg Scott, Janina & Nancy Swiacki,
Robert Szacik, Richard Wall, Boy Scouts Troop 32 Foxboro MA.

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

Memorial & Tribute Donations

Diane Mathurin, Lionel Vincent, Bernard Albetski, Charles Christos,
Irene Garand, John L. Lapomardo, Herman Schwenker, Theresa L. "Terry" Hetu,
Madhuri Bhachech, Susan W. Bonak, Tom Griffin, The Volunteers.

Special Thanks on Behalf of our Consumers

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
LADIES' BENEVOLENT SOCIETY, FOR THEIR HOLIDAY GIFT BAGS
WEBSTER MANOR, FOR THANKSGIVING BASKETS
MARJORIE RUBERTI, FOR THE WARM KNIT HATS
BETTY ANN GADOURY, FOR LOVELY AFGHANS
ALLISON ROUTHIER, FOR LOVELY AFGHANS
BLESSED BACKPACK BRIGADE



28th Annual Winter Food Project



Tri-Valley's Winter Food Project is an annual program that assists those facing food insecurity and social isolation. The FY2023 project helped 364 older adult 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 consumers at risk and our entire staff who are involved in the assembly and delivery of these bags.

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 2023, Tri-Valley had 140 full-time employees, 46 part-time employees and 47 substitute/per diem employees for a total of 233 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 the past year, Meals on Wheels saw a greater demand for services. The number of referrals was up, and the number of meals consumers requested also increased. Tri-Valley staff and volunteers worked hard to deliver these meals and provide a daily wellness check to grateful recipients.



Tina Mead, Senior Biller, was the proud recipient of the 2022 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 a Chief Executive Officer 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 61 communities in Central Massachusetts.