



Tri-Valley
HOME WITH YOU

2024 Annual Report

48 Years of Giving People

DIGNITY • INDEPENDENCE • CHOICE

Fiscal Year 2024 Board of Directors

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Francis White, Spencer

** Left during Fiscal Year 2024*

Message from the President

By 2030 the Baby Boomers in the US aged 66 to 84 will number 61 million people. The oldest of those, born prior to 1946, will number 9 million people. These estimates cause significant implications for public policy concerning the long-term care and economic burden an aging society will place on the caregiving system and public finances. Tri-Valley, Inc. is prepared to meet these challenges.

It is our mission to help older adults 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 people through the challenges created by aging, living with a disability or being a caregiver. Our goal is to make it easier to find solutions and access appropriate services.

The rising cost of food and energy will have the greatest impact in 2025. We do not want consumers choosing between food and heat, electricity or medication. If you are having trouble paying a utility bill, need help with food or housing assistance call Tri-Valley, Inc. for support or dial 211 for information about where you can get help. Please check in with your parents, friends, and neighbors. Make sure they are warm and safe this Winter.

Caregivers are often our first point of contact. Caregivers provide two types of supportive care: assistance with instrumental activities of daily living, such as shopping or cleaning, and assistance with physical activities of daily living such as eating, bathing, or moving around. Among older adults who require assistance with daily activities, 65 percent rely exclusively on families and friends and another 30 percent rely, at least in part, on informal care. Our Caregiver Support Program provides access to information, resources, services, training and support. For information on the Caregiver Support program, to request caregiver services or obtain a free Guide, Organizer or Long Distance Booklet please contact the Caregiver Support Program at Tri-Valley, Inc. 508-949-6640.

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 support 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” in memoriam 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, and to assist with office work and special events. Let me say *Thank You* to you!



*Brian J. Perry
President*

Tri-Valley Community Activities



Lisa Prince, CEO and Luz Rivera, VOC attended a dinner for the Silkies Hike event in Milford. This group seeks to decrease Veteran suicide by providing social connections and scheduled hikes throughout the country.



Blue Envelope Brigade!



Lisa Price, CEO accepts a donation from the Massachusetts Bankers Association for "The great work done at Tri-Valley."



The 2023 Terrazza Giving Tree Project helped many of our neediest consumers.



Tri-Valley staff on their annual walk for Breast Cancer Awareness 2023



Through Subaru's Share the Love event, Long Subaru donates to the Meals on Wheels program.

More to offer with Tri-Valley, Inc.

Tri-Valley, Inc. is proud to offer Certified Application Counselor (CAC) services to help individuals navigate the complexities of health insurance. Our trained CACs provide free, personalized assistance to residents of the Commonwealth, guiding them through the application, renewal, and eligibility processes for programs like MassHealth. As part of the Massachusetts MassHealth redetermination effort through the Health Care for All initiative, our CACs are helping people maintain their healthcare coverage during this crucial period. By offering this critical service in multiple languages and through trusted, community-based outreach, we aim to ensure everyone has access to the health coverage they need.



Tri-Valley staff providing information about MassHealth redetermination at Webster's Night Out event.



Tri-Valley staff hosting games at the Southbridge Night Out event.

Tri-Valley's Case Manager Accelerated Training Program



Session 1 Graduates
September 2023



Session 2 Graduates
February 2024



Session 3 Participants
September 2024

In September 2023, the Case Management Accelerated Training program, known as CMAT welcomed its first group. This is a paid 11-week intensive certificate program that trains people without a bachelors degree to work as case managers. This includes direct service workers and other individuals seeking career development or an introduction into the human services field as a case manager. The CMAT workforce development initiative received its initial funding from EOHHS. CMAT partners with professors from nearby colleges and universities, experts in the field, and area human services agencies to provide classes and field placements. The classes provide the setting to teach a well-rounded skill set (such as documentation, interviewing, ethics and boundaries) and the field placement allows participants to gain a clearer understanding of the role of a case manager, and apply what they are learning to the real world. Towards the end of the program, CMAT provides career development and employment support to help bring CMAT certificate earners into the workforce.

CMAT has enrolled 57 people with 87% of CMAT Alumni securing employment in the human services field within 45 days of completing the program. CMAT was recently highlighted by The Center for Aging and Disability Education and Research through Boston University School of Social Work, (CADER) as a mutually enriching partnership and has formed partnerships with ESWA, Seven Hills Foundation, and Open Sky Community Services to provide field placement experiences. CMAT is currently seeking and pursuing funding to continue this successful and impactful program.

Foundation & Major Donor Support

Fiscal Year 2024 (July 1, 2023 – June 30, 2024)

(\$100,000—500,000)

Massachusetts Department of Veterans' Services, Mass Department of Transportation,
Executive Office of Elder Affairs, Executive Office of Health and Human Services

(\$10,000 —99,999)

Health Care For All, United Way of South Central Massachusetts, G. Wells Foundation, Bank of America,
Katherine C. Pierce Trust, Customers of Terrazza, Central Massachusetts Regional Planning Commission,
John J. & Elizabeth M. Kunkel & Family Foundation, Inc.

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

Subaru *Share the Love*, Sutton Lions Club Foundation, Inc., Webster Five Foundation,
The TJX Foundation, Inc., Massachusetts Banker's Association Charitable Foundation Inc.

(\$500 - \$999)

Melissa Mercon Smith, Theodore Christiansen, Kimberly Tonkin, Melissa & Daniel Welsh

(\$250 - \$499)

Maura & Robert Lucier, Lorene & Jenna Gouin, Bellingham Elder Service Group, Inc.,
Fidelity Charitable, Dona Son, Catholic Financial Life, Quinebaug Lodge

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 Senior Connection (formerly know as 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 2024 (July 1, 2023 – June 30, 2024)

Community Services & Information:

Information & Resource Calls: 16,265 Options Counseling: 484
 Congregate Housing Residents: 26 Resident Services: 616
 Benefit Enrollment (BEC) Referrals: 135 (7/1/23-12/31/23)
 Benefits Support Specialist: 167
 Elder Mental Health Outreach Referrals: 220
 Veterans Outreach Grant Referrals: 250
 Veterans and Veteran Dependents Supported
 under Veterans' Outreach Grant: 362

Family Caregiver Support

Caregiver Counseling & Access Assistance: 316
 Group Outreach & Education Participants: 119
 Caregiver Scholarship Recipients: 141

Mass Health Programs:

Adult Family Care Consumers: 187 Care Transition Consumers: 235
 One Care Members: 220 Personal Care Attendant Consumers: 1,870
 Senior Care Organization Members: 1,643

Nutrition Services:

Meals on Wheels Consumers: 2,146 Meals Delivered: 272,190
 Congregate Participants: 991 Congregate Meals Served: 32,682

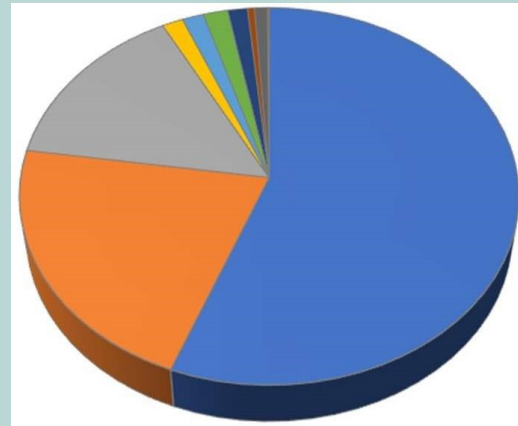
Protective Services:

Protective Services Cases: 1,538 Crisis Intervention Cases: 375
 Money Management Consumers: 94
 Advocacy & Navigating Care in the Home with Ongoing Risks: 25

State Home Care:

State Home Care Consumers: 2,820
 Clinical Assessment & Evaluation Screenings: 1,390

Unaudited Sources of Revenue



Executive Office of Elder Affairs	\$18,587,778.46	55.9%
Private Contracts	\$7,158,204	21.5%
Medicaid	\$4,966,305	14.9%
Grants and Appropriations	\$495,153	1.5%
Fundraising and Donations	\$507,894	1.5%
Project Income and Client Fees	\$581,318	1.7%
Senior Connection	\$470,431	1.4%
Miscellaneous	\$165,833	0.5%
Interest & Investment	\$303,387	0.9%
Commodity Foods - NSIP	\$42,982	0.1%
Total	\$33,279,286	100.00%

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

General Donations

Fiscal Year 2024 (July 1, 2023 — June 30, 2024)

(\$100 - \$249)

Richard Auger, Boy Scouts of America Troop 32, Bernard Chase III, Ted Bartlett,
Jean Dalbec, Marguerite Gaddis, Gary Goldberg, Brian & Sandra Graeff, Evelyn Grovesteen,
Paul & Laura Halacy, Connie & Henry Nelson, Joan & Stephen Heller and the Heller Cousins,
Veronica & Dominic Dolge, Daniel Leduc, Judith Maning, Mary McDonald,
Anna McKinnon & Linda Scrivano, Evelyn & Sam Pappas, Daphnea Ryan, Fran Small,
Mary Lou Staples, Stacie & Richard Welches, Frank White

(Up to \$99)

George Acquaaah-Mensah, Joe Aloisi, George Bansfield, Greg Bazinet, Rosalie Beals, Michael Caplette,
Lorraine & Jim DaDalt, Francis E. Desisto, Veronica & Dominic Dolge, Betty Ann Gadoury,
Shirley Gaulin, Harry Gawronski, Tricia Gay, Rose Harris, Jim Howard, Deann Iandolo,
Michelle Todd Corey and Tyler Langevin, Jenny Hopewell, Bob Jenkins, Amy Jordan,
Anjena Kuzdzal, Jean & Robert Murdock, Ann & Edmond Tremblay, Suzanne Lewandowski,
Caroline Macharia, Richard Majercik, Jean Mateychuk, Helen McDonald, Barbara M Merrill,
Robert & Jean Murdock, Barbara Nevin, Barbara O'Brien, Brian Perry, Virginia Rapo, Pam & Arny Spielberg,
Janina & Nancy Swiacki, Southbridge Woman's Club, Suzanne & Alan Ventura, Paul Virgadamo, Carol White

Memorial & Tribute Donations

Dominic Aloisi, Leroy & Audry Bacon, Susan W. Bonak (Mayo), Paul & Louise Bonnette,
Madeline Credit, Charles Christos, Eugene Cyr, James Gouin, Tom Griffin, James Hansen,
Winifred Krajewski, Eleanor Kus, John L. Lapomardo, Irene Lucier, Diane Mathurin,
Mary & Cliff Rivet, Bill & Pat Ryan, Bill & Stacie Sudjak, Lionel Vincent

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
BLESSED BACKPACK BRIGADE



30th Annual Winter Food Project



Tri-Valley's Winter Food Project is an annual program that assists those facing food insecurity and social isolation. The FY2024 project helped 375 older adult consumers and younger people with disabilities—each received two reusable shopping bags filled with non-perishable items such as 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 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 2024, Tri-Valley had 147 full-time employees, 54 part-time employees and 50 substitute/per diem employees for a total of 251 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.



Meals on Wheels continues to see a greater demand for services. Tri-Valley staff and volunteers work hard to deliver meals and provide a daily wellness check to grateful recipients.



Scott Neely, Technology Specialist was the proud recipient of the 2023 Marilyn L. Travinski Award for Excellence. Nominations for this prestigious award come from staff members with review and final decision made 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.
The Personal Care Attendant Program also serves: Auburn, Holliston, Hopkinton, Leicester, Marlboro, Millbury, Millis, Norfolk, Northboro, Southboro, Westboro, Worcester & Wrentham.

