



December 7, 2020

To the Citizens of the Town of Bennington,

On behalf of BROC Community Action and the thousands of people with low-income or living in poverty that we serve throughout Rutland and Bennington Counties, we want to express our thanks and gratitude for supporting us over the years on Town Meeting Day. BROC Community Action assists families and individuals in crisis and help provide a sustainable path forward.

Over the past year, BROC Community Action assisted **1,564** residents in the Town of Bennington. Whether they need food at the BROC Community Food Shelf, senior commodities, housing counseling, homelessness assistance, heating and utility assistance, forms assistance for benefits such as 3SqVT, budget and credit counseling and resources and referrals; we are here.

People come to us cold, hungry, homeless, jobless or facing major health conditions every day. Your town appropriation helps ease the struggle for nearly 10,000 people who seek assistance from us each year as we meet the basic needs of their families and provide a path forward whenever possible.

Respectfully, our appropriation request for the upcoming fiscal year remains \$6,750.00.

We truly value our collaboration with Bennington as we assist those most in need.

Sincerely,

A handwritten signature in blue ink, appearing to read "Tom", is written over a thin blue horizontal line.

Thomas L. Donahue, CEO
tdonahue@broc.org

BROC-Community Action in Southwestern Vermont

		Budget FY21
SUMMARY		
Funding		\$5,772,400
Federal Grants		\$2,555,954
STATE GRANTS		\$2,570,776
FOUNDATION GRANTS		\$52,500
RENTAL INCOME		\$118,104
Contributions		\$101,066
TOWN FUNDING		\$42,000
WX - EVT		\$240,000
UNITED WAY		\$5,000
WARMTH		\$60,000
OTHER		\$27,000
TOTAL SALARIES:		\$ 1,717,540
FRINGE:	% of Salaries:	\$628,589
TOTAL PERSONNEL SERVICES		\$2,346,128
OPERATIONS		
Indirect	% of Salaries:	\$520,193
Space		\$307,109
Insurance		\$77,768
Computer Services		\$11,778
Telephone		\$26,112
Postage		\$5,195
Travel		\$95,604
Equipment/Depr/Pur/Use		\$112,905
Supplies		\$68,183
Professional Services/Audit		\$34,765
Contracts/Dues & Subscriptions		\$19,554
Printing/Copying		\$30,557
Training and Staff Development		\$81,134
Transfer In/OUT		\$0
TOTAL OPERATIONS		\$1,390,857
TOTAL PERSONNEL AND OPERATIONS:		\$3,736,986
DIRECT CLIENT SUPPORT:		
WX Materials		\$607,723
Subcontract Labor		\$228,431
Direct Service -Providers(CACFP)		\$243,516
Direct Service - Food		\$34,000
Direct Service Housing		\$304,932
Direct Service Other Embrace Grants		\$279,501
Direct Service Fuel/Electric/Other		\$276,441
TOTAL DIRECT CLIENT SUPPORT:		\$1,974,543
TOTAL BUDGET:		\$5,711,529
Total Net		\$60,871

* Indirect Rate Agreement is 30.3% of salaries

2020 BROCC Community Action approved town funding:

Town	Ask	Passed?
Benson	\$ 1,250.00	Yes
Castleton	\$ 2,725.00	Yes
Clarendon	\$ 250.00	Yes
Danby	\$ 547.00	Yes
Fair Haven	\$ 3,000.00	Yes
Hubbardton	\$ 550.00	Yes
Killington	\$ 500.00	Yes
Ira	\$ 250.00	Yes
Middletown Springs	\$ 200.00	Yes
Mount Holly	\$ 550.00	Yes
Mount Tabor	\$ 200.00	Yes
Pawlet/ West Pawlet	\$ 500.00	Yes
Pittsford	\$ 925.00	Yes
Poultney	\$ 1,000.00	Yes
Proctor	\$ 1,000.00	Yes
Rutland City	\$ 10,000.00	Yes
Rutland Town	\$ 975.00	Yes
Shrewsbury	\$ 600.00	Yes
Sudbury	\$ 300.00	Yes
Tinmouth	\$ 200.00	Yes
Wallingford	\$ 500.00	Yes
Wells	\$ 475.00	Yes
West Haven	\$ 200.00	Yes
West Rutland	\$ 1,250.00	Yes
Bennington County		
Arlington	\$ 1,200.00	Yes
Bennington	\$ 6,750.00	Yes
Dorset	\$ 1,000.00	Yes
Manchester	\$ 1,811.00	Yes
Peru	\$ 200.00	Yes
Pownal	\$ 1,800.00	Yes
Readsboro	\$ 500.00	Yes
Rupert	\$ 400.00	Yes
Sandgate	\$ 137.00	Yes
Searsburg	\$ 50.00	Yes
Shaftsbury	\$ 1,700.00	Yes
Stamford	\$ 500.00	Yes
Woodford	\$ 300.00	Yes

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

2018

Open to Public Inspection

A For the 2018 calendar year, or tax year beginning **OCT 1, 2018** and ending **SEP 30, 2019**

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization BROC COMMUNITY ACTION IN SOUTHWESTERN VERMONT Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite 45 UNION STREET City or town, state or province, country, and ZIP or foreign postal code RUTLAND, VT 05701 F Name and address of principal officer: MARY JEAN INGLEE 45 UNION STREET, RUTLAND, VT 05701	D Employer identification number 03-0216505 E Telephone number (802) 775-0878 G Gross receipts \$ 5,393,549. H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) H(c) Group exemption number ▶
J Website: ▶ WWW.BROC.ORG		I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		L Year of formation: 1965 M State of legal domicile: VT

Part I Summary

1	Briefly describe the organization's mission or most significant activities: PROVIDING HOPE, OPPORTUNITY AND A PATH FORWARD OUT OF CRISIS OF POVERTY, SO OUR NEIGHBORS AND	
2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.	
3	Number of voting members of the governing body (Part VI, line 1a)	12
4	Number of independent voting members of the governing body (Part VI, line 1b)	12
5	Total number of individuals employed in calendar year 2018 (Part V, line 2a)	70
6	Total number of volunteers (estimate if necessary)	25
7a	Total unrelated business revenue from Part VIII, column (C), line 12	46,604.
7b	Net unrelated business taxable income from Form 990-T, line 38	-8,791.
8	Contributions and grants (Part VIII, line 1h)	4,662,586.
9	Program service revenue (Part VIII, line 2g)	618,269.
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	0.
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0.
12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	5,280,855.
13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	1,674,528.
14	Benefits paid to or for members (Part IX, column (A), line 4)	0.
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,712,264.
16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.
b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 0.	
17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	969,618.
18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	5,356,410.
19	Revenue less expenses. Subtract line 18 from line 12	-75,555.
20	Total assets (Part X, line 16)	3,660,492.
21	Total liabilities (Part X, line 26)	2,975,996.
22	Net assets or fund balances. Subtract line 21 from line 20	684,496.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer MARY JEAN INGLEE, PRESIDENT Type or print name and title	Date
Paid Preparer Use Only	Print/Type preparer's name EVAN STOWELL	Preparer's signature 01/17/20
	Firm's name ▶ LEONE, MCDONNELL & ROBERTS, PA	Check <input type="checkbox"/> if self-employed PTIN P00846331
	Firm's address ▶ 61 SOUTH MAIN STREET, PO BOX 1140 WOLFEBORO, NH 03894	Firm's EIN ▶ 02-0417217
		Phone no. 603-569-1953

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

BROC COMMUNITY ACTION IN SOUTHWESTERN

VERMONT

03-0216505 Page 2

Form 990 (2018)

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

1 Briefly describe the organization's mission: PROVIDING HOPE, OPPORTUNITY AND A PATH FORWARD OUT OF CRISIS OF POVERTY, SO OUR NEIGHBORS AND COMMUNITIES THRIVE.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? Yes No

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 1,855,945. including grants of \$ 669,311.) (Revenue \$ 516,537.) COMMUNITY SERVICES - ADMINISTERS PROGRAMS AND SERVICES TO HELP ALLEVIATE POVERTY, PREVENT CRISIS, AND HELP PEOPLE WITH LOW OR LIMITED INCOME BECOME SELF-SUFFICIENT. PROGRAMS AND SERVICES INCLUDE FAMILY ECONOMIC DEVELOPMENT, EMERGENCY FOOD AND SHELF, FOOD AND NUTRITION EDUCATION, FUEL AND UTILITIES, AND HOUSING AND HOMELESS ASSISTANCE

4b (Code:) (Expenses \$ 2,345,092. including grants of \$ 853,102.) (Revenue \$) WEATHERIZATION - ADMINISTERS PROGRAM TO HELP LOW AND LIMITED INCOME ELIGIBLE FAMILIES REDUCE ENERGY COSTS IN THEIR HOME. PRIORITIES ARE GIVEN TO ELDERLY, DISABLED, AND HOUSEHOLDS WITH CHILDREN UNDER THE AGE OF FIVE. ADMINISTERS SOUTHWESTERN VERMONT ENERGY SAVERS (SAVE'S) AS A FEE BASED ENERGY EFFICIENT SERVICE FOR THE GENERAL COMMUNITY.

4c (Code:) (Expenses \$ 330,321. including grants of \$ 258,609.) (Revenue \$) NUTRITION EDUCATION: ADMINISTERS THE CHILD AND ADULT CARE FOOD PROGRAM TO REIMBURSE REGISTERED OR LICENSED DAY CARE HOME PROVIDERS TO DEFRAY THE COST OF SERVING NUTRITIOUS SNACKS AND MEALS TO CHILDREN WHOSE FAMILIES ARE LOW OR LIMITED INCOME ELIGIBLE

4d Other program services (Describe in Schedule O.) (Expenses \$ 534,595. including grants of \$ 10,070.) (Revenue \$)

4e Total program service expenses 5,065,953.

Form 990 (2018)