

# The Rough Notes Company

## COMMUNITY SERVICE AWARD OPPORTUNITY

Applications being accepted for independent agents, brokers, and their firms

By Robert N. Kretzmer, CIC

December marks our annual call for independent agents, brokers, or agencies to be nominated for The Rough Notes Company Community Service Award. This award recognizes and honors independent agents for their extraordinary and positive contributions.

The Rough Notes Company, publisher of *Rough Notes* magazine, sponsors the annual Community Service Award for independent agents, brokers, or agencies because we firmly believe that helping others in need is extremely important, and we want to honor the professionals who perform those special community service projects that help the less fortunate.

We are seeking extraordinary agents, brokers, or agencies that have provided needed services to their communities; these projects could take a number of different forms, such as fundraising activities, providing food for the hungry, disaster relief, building houses, and supporting nonprofit organizations, just to name a few (please see our list of former winners and their special projects, which begins in the next column). Nominees will be judged on their overall contribution to their community through their service projects and the impact that their efforts have made on local residents and their respective communities.

The winning agent, broker, or agency will be honored at a special dinner in the Spring of 2024 in conjunction with the *Rough Notes* Agency of the Year celebration in Indianapolis. The winning philanthropic organization or charity will receive a \$5,000 check in the name of the winning agent, broker, or agency. Additionally, the winner will be presented an engraved eagle sculpture and will be featured in an article in a future issue of *Rough Notes* magazine about the winning community service project.

We encourage you to complete the nomination form and return it to The Rough Notes Company on or before December 29, 2023.

Our past honorees, listed below, represent the kind of socially concerned, responsible men and women in whom our industry can take great

pride. Without a doubt, those we have honored are only a small percentage of the many insurance professionals who are equally worthy of formal recognition. We again ask that you please nominate a deserving insurance professional this year for our prestigious award.

Previous winners of The Rough Notes Company Community Service Award for independent agents, brokers, and agencies are:

**2022—Susan Shaw, Hurst, Texas:** Susan and her family created and operate Goals for Bowls Foundation, bringing food, soccer balls and water systems to villages overseas.

**2021—Higginbotham, Fort Worth, Texas:** For their work with Higginbotham Community Fund and other initiatives.

**2020—Bill Mitchell, Waterville, Maine:** For his work with Boys & Girls Clubs and YMCA of Greater Waterville, and other initiatives.

**2019—Accel Group, LLC, Cedar Rapids, Iowa:** Created and ran a garden that yielded nearly five tons of tomatoes, squash, celery and kale for Iowa families.

**2018—SouthGroup Insurance Services, Ridgeland, Mississippi:** Its annual 5K benefits the Friends of Children's Hospital and the Blair E. Batson Hospital for Children in Jackson.

**2017—Wayne Coffey, Hunt Valley, Maryland:** Founded No More Stolen Childhoods, an organization that raises awareness of childhood sexual abuse.

**2016—Charlebois Trépanier Insurance and Risk Management, Gatineau, Quebec, Canada:** Organizes multiple fundraising events for the Multiple Sclerosis Society of Canada.

**2015—The Henriott Group, Lafayette, Indiana:** Partners to improve students' reading skills and increase involvement in education by parents, businesses, and organizations.



**2014—TG Nulty, Otsego, Michigan:** Provides funding for Urban Youth for Africa, which helps economically disadvantaged teens finish high school and become community leaders.

**2013—James Colangelo and Richard Morello, Florham Park, New Jersey:** Founded and operate Family Reach Foundation, which provides funding for expenses for families dealing with pediatric cancer.

**2012—Disabled Veterans Insurance Careers, Fort Myers, Florida:** James Pender and Gary Trippe established a foundation that helps disabled veterans find career paths in insurance.

# The Rough Notes Company

## Community Service Award

### Award Conditions and Prerequisites:

**Purpose:** To recognize and present an award to an independent insurance broker, agent or agency that has demonstrated extraordinary community service within his, her or their local, regional or national community. To present the winning philanthropic organization designated by the agency with a check in the amount of \$5,000 to help further its special cause(s).

**Criteria:** Nominees will be judged on their overall contribution (funds raised, people helped, volunteerism, etc.) to their community service project and/or initiative, and positive impact (both short-term and long-term) that their efforts have made in their community.

**Nomination period:** Nominations will be accepted at the offices of *Rough Notes* magazine by U.S. mail, overnight delivery or hand delivery up to and including December 29, 2023. No nomination forms will be accepted after December 29. Please note that no facsimiles or emails will be accepted.

### Conditions:

1. Nominators must complete the nomination form in its entirety and provide all supporting documentation.
2. All nomination forms and supporting documentation must be received no later than December 29, 2023.
3. All nomination forms MUST include a supporting letter from the philanthropic organization verifying AND documenting the insurance broker, agent, or agency involvement.
4. No facsimiles or emails will be accepted.
5. All nomination forms and supporting documentation become the exclusive property of The Rough Notes Company. Further, the nomination form and supporting documentation may be used at the sole discretion of *Rough Notes* magazine to publicize the award and award recipient, and to promote the Community Service Award program.
6. Incomplete nomination forms or nomination forms without supporting documents will not be considered.
7. Nominators may nominate themselves or their agency.

**Selection:** Designated individuals from The Rough Notes Company and selected others will review all nomination forms and supporting documentation and select a winner. The winner will be honored at *Rough Notes* magazine's Agency of the Year awards dinner in Indianapolis.

### Awards:

1. The philanthropic organization will receive a check for \$5,000 to be used to further its endeavors.
2. The winning broker, agent or agency will be presented with a sculptured engraved eagle.
3. *Rough Notes* magazine will publish an article to publicize the community service project and award winner.  
The awards dinner will be held in Indianapolis, Indiana, in the Spring of 2024.

**Mailing:** Send all nomination forms and supporting documents to:  
The Rough Notes Company, Inc.  
Attention: Community Service Award  
11690 Technology Drive  
Carmel, Indiana 46032-5600

**2011—Chris Paradiso, Stafford Springs, Connecticut:** Provides funding for the Connecticut Children's Medical Center in Hartford, Connecticut.

**2010—Craig Moon, Middletown, Ohio:** Created, developed, and funds an adult autism community living facility in Ohio.

**2009—Barbara Galgiani, Modesto, California:** Helped create and raises funding for a hospice organization in California.

**2008—D. Gaines Lanier, West Point, Georgia:** Reconstructs housing in poverty-stricken areas of Georgia and Alabama.

**2007—Co-Winner Mark Williamson, Little Rock, Arkansas:** Provides funding for a radiation therapy institute in Arkansas.

**2007—Co-Winner Markham Rollins III, Rye Brook, New York:** Raises funds to build houses and constructs housing for needy families in Nicaragua.

**2006—J. Douglas Reichart, West Des Moines, Iowa:** Chaired a local Iowa United Way campaign to an all-time record donation year.

**2005—Jim McGovern, Belmont, California:** Created and is the program organizer for a local branch of the California Leukemia & Lymphoma Society.

**2004—Harry Swimmer, Charlotte, North Carolina:** Founded and operates a therapeutic horseback riding clinic for ill children and adults.

**2003—Jack and Jason Rua, Fall River, Massachusetts:** Chaired a fundraising campaign and a key committee for a highly successful United Way campaign.

**2002—Kenneth Felton, Vero Beach, Florida:** Developed a local Boys & Girls Club in Indian River, Florida.

**2001—Dick Lees, Pana, Illinois:** Promoted funding for the addition of a new emergency room at a local hospital.

**2000—Al Singer, Teaneck, New Jersey:** Founded the People Against Starving Children program, which feeds children in New Jersey and around the country. ■

### The author

*Robert N. Kretzmer, CIC, is executive director of The Rough Notes Company Community Service Award program.*

# The Rough Notes Company

## Community Service Award

### Nomination Form

Deadline: December 29, 2023

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

#### I. Nominee Information (Required)

Nominee:  Broker  Agent  Agency (please indicate one only)

Nominee Name: \_\_\_\_\_  
(last) (first) (middle initial) (designations - i.e., CIC, CPCU, etc.)

Nominee Cell Phone: \_\_\_\_\_

Agency Name: \_\_\_\_\_

Agency Address: \_\_\_\_\_  
\_\_\_\_\_  
(Street or P.O. Box)

\_\_\_\_\_  
(City) (State) (Zip)

Telephone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ Email: \_\_\_\_\_

#### II. Community Service (Charity) Information (If a single charity is designated by the agency)

Charity Name: \_\_\_\_\_

Charity Address: \_\_\_\_\_  
(Street or P.O. Box)

\_\_\_\_\_  
(City) (State) (Zip)

Charity Telephone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ Email: \_\_\_\_\_

Charity Contact Person: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
(Name & Title)

#### III. Community Service Information (Required)

Please explain why your nominee should be considered for the Community Service Award by providing the following information and documents:

1. Describe **in detail** your nominee's local, regional or national community service project or initiative, *including* the short-term **and** long-term impact on the specific community.
2. Attach pertinent documents to support your nominee. This may include, but is not limited to, newspaper articles, citations, brochures, videos, DVDs, CDs, press releases, testimonials or other information germane to this award.
3. Attach your nominee's resume or biographical information.
4. Attach any other pertinent information or documents that will aid in the consideration of your nominee.
5. Incomplete nomination forms will **not** be considered.

#### IV. Nominator Information (Required)

Name of Nominator: \_\_\_\_\_

Agency or Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
(Street or P.O. Box)

\_\_\_\_\_  
(City) (State) (Zip)

Telephone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ Email: \_\_\_\_\_

#### V. Filing Information

1. All nomination forms and supporting documentation must be received at The Rough Notes Company offices by December 29, 2023.
2. Incomplete nomination forms will **not** be considered.
3. **Attach a letter from the community service project (charity) verifying and documenting the foregoing project.**
4. All nomination forms and supporting documentation become the exclusive property of The Rough Notes Company.
5. No facsimiles or emails will be accepted.
6. Send completed nomination form and supporting documents to:

**The Rough Notes Company, Attn: Community Service Award**  
**11690 Technology Drive • Carmel, IN 46032-5600**