



The Insurance Library
Research • Education • Engagement

**2023
DONOR
&
SPONSOR
REPORT**



BROKER'S BOX FROM THE 1928 LLOYD'S BUILDING IN LONDON
- DONATED TO THE LIBRARY IN 2014 BY WALLACE E. SISSON -

SAVE THE DATE FOR THESE 2024 EVENTS

Nominations Due for the 2024 Nancy Z. Bender Award

February 23

Third Annual Insurance Library Scavenger Hunt

May 8
(Rain Date, May 15)

Nominations Open for the 2024 Insurance Professional of the Year Award

May 14—June 7

Summer Program for Library Member Organization Interns and Early Career Professionals

June 10—August 9

2024 Annual Fund Drive Ends

June 30

2024 Insurance Professional of the Year Award Gala & Silent Auction

October 4

**A MESSAGE
FROM OUR
EXECUTIVE
DIRECTOR**

February 2024

Dear Friends,

On behalf of the Library's Board of Trustees and staff, I am pleased to present our **2023 Donor & Sponsor Report**. Although in the past we recognized annual fund donors, IPYA sponsors and donors, scavenger hunt sponsors, webinar sponsors, and other supporters in various ways, we've never acknowledged all our supporters in one place.

So, it is with deep appreciation and gratitude for the support by each person and organization listed on the following pages that we present this comprehensive report regarding support for fundraising and other events that took place in 2023, including our 2023 annual fund drive, which ended on June 30, 2023, and our signature event, the Insurance Professional of the Year Award Gala & Silent Auction, which took place on October 13, 2023. All of the financial support identified in this report helps the Library fulfill its mission and work to attain its vision.

We are also excited to introduce a new form of recognition for those providing the highest levels of total financial support to the Library. Named in honor of Henry Hess, one of the Library's founders, the **Henry E. Hess Benefactor Society** recognizes those whose total financial support of the Library in the most recent fiscal year—including annual fund donations, IPYA or scavenger hunt sponsorships, webinar sponsorships and other education program fees, membership dues, and other financial support—equals or exceeds \$25,000.

The two inaugural members of the Benefactor Society are **The Andover Companies** and **Safety Insurance Group**. We are deeply grateful for, and appreciative of, their extraordinarily generous, enthusiastic, and wide-ranging support of the Library and its programs.

If you would like any information about the Library's services, education programs (including collaborations or in-house courses), upcoming events, or membership benefits—or if there is anything I can do to enhance your experience with the Library—please do not hesitate to contact me directly.

Sincerely,



Michael A. Pezza Jr.
Executive Director



MORE THAN JUST A LIBRARY

WHAT WE ARE

The Insurance Library Association of Boston was founded in 1887. It is the country's first, and only remaining, independent library dedicated solely to the subject of insurance.

The Library maintains a comprehensive collection of print and digital materials, including insurance policies and forms, periodicals, legal treatises, and insurance memorabilia. While we are proud of our 136-year role as an **insurance reference and research resource**, we are far more than just a library.

The Insurance Library provide an array of **education programs**—including webinars and in-person classes, licensing and designation exam preparation courses, and virtual or in-person customized in-house classes and courses. We also provide **engagement events**, including our signature event, the **Insurance Professional of the Year Award Gala & Silent Auction**, our annual **Insurance Library Scavenger Hunt**, the **Nancy Z. Bender Award** for customer or community service, and our popular **Summer Intern Program**, which offers education programs, networking opportunities, and special events for summer interns and early career professionals working for member organizations.

OUR MISSION

The Library's mission is to provide the insurance, risk management, and legal communities, as well as the public, with excellent **research** resources and services, high-quality **education** programs, and opportunities for **engagement**.

OUR VISION

Our vision is to be **recognized** as the **preeminent nonprofit provider** of such services and programs, **build** upon our **unique position as a hub** for engagement, and **expand our reach nationally**.

WHAT WE DO

RESEARCH

Our unique collection of insurance materials is available to members (who may borrow most materials and may arrange for remote access to the EBSCO database and in-Library access to certain A.M. Best digital resources) as well as the public wishing to do insurance-related research. These resources include:

- Thousands of books and periodicals, including monographs, treatises, government reports, and trade journals.
- Historical and contemporary policy forms and drafting and revision information, including ISO, AAIS, and company-specific forms.
- Financial and statistical information, including A.M. Best Reports dating to 1900.
- Regulatory information, including insurance department reports and a collection of proceedings of the National Association of Insurance Commissioners.
- Digital resources such as SilverPlume, FC&S, our proprietary article index, and a full-text periodical database powered by EBSCO.

We have an experienced, professional research librarian who for a fee can perform research or assist individuals in their own research. As a public service, we provide pro bono research services to consumers referred to the Library by the Massachusetts Division of Insurance.

EDUCATION

The Library is a leading provider of education programs, including:

- Monthly **webinars approved for producer continuing education credit** in all six New England states, which are also well-suited for those wishing to expand their insurance knowledge without seeking CE credit.
- **Webinar sponsorship opportunities** that provide insurers, brokers, risk managers, and others with a cost-effective way to offer CE classes to employees or producers, while taking advantage of a unique marketing and branding opportunity.
- Virtual and in-person **customized education** classes and courses.
- Program **collaborations** with insurance, risk management, or legal organizations such as Social Law Library and Massachusetts RIMS, and professional firms such as Deloitte.
- Programs concerning **DEI** (diversity, equity, and inclusion) and **ESG** (environmental, social, and governance) topics.
- A **Summer Intern Program**, which provides educational programs concerning insurance and career success for interns and early career professionals from member organizations.



ENGAGEMENT

The Library is a hub for networking and engagement events for the members of the insurance, risk management, and legal communities, and we also participate in insurance industry events.

In 2023, our engagement events included:

- The second annual **Insurance Library Scavenger Hunt**, which was a great team building and networking event for almost 200 participants.
- Our **Summer Intern Program**, which in addition to education programs noted earlier offered networking opportunities and special events such as an ice cream social and a professional headshot session for more than 80 registered program participants.
- Virtual **Lunch & Learn** and book-related **Launch & Learn** talks.
- **Presentations** to insurance industry conferences and events, and a post-conference reception at the Library for insurance management consultants.
- **Social events**, including the Library's annual **holiday open house**.
- The first in-person ceremony and reception for the annual **Nancy Z. Bender Award** for customer and community service, which was presented to the 2023 recipient Tammy Bailey, Manager, Personal Lines Underwriting, at The Andover Companies.
- A record-setting **Insurance Professional of the Year Award Gala & Silent Auction** at the InterContinental Boston, where 500 people from New England and across the country gathered to celebrate the 2023 recipient, Dan Bridge, Board Chair, President & CEO of Vermont Mutual Insurance Group.



**HENRY E.
HESS
BENEFACTOR
SOCIETY**

Named in honor of one of the Library's principal founders, the Benefactor Society recognizes those who in the most recent fiscal year provided \$25,000 or more of total financial support to the Library—including annual fund donations, IPYA sponsorships, donations, and silent auction items, scavenger hunt sponsorships, membership dues, webinar sponsorships and other education program fees, summer intern program fees or sponsorships, and in-kind donations.

With gratitude for their substantial financial support of the Library, we are pleased to announce the two inaugural members of the

HENRY E. HESS BENEFACTOR SOCIETY

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and



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2023 ANNUAL FUND DONORS

“1887 Circle” designates membership in the 1887 Circle, which recognizes donors who made an annual fund gift in each of the past three consecutive years. We thank the 1887 Circle members for their consistent support of the Library.

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¹ In Honor of Josiah P. Hatch

² In Memory of Tom McGraw

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Thank you to our 2023 Event Patron and other generous IPYA sponsors for their roles in making the October 13, 2023, gala such a success.

We look forward to seeing you at this year's IPYA gala on October 4.



EVENT PATRON



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Thank you to those
who donated to the
Library in honor of
Daniel C. Bridge, the
2023 recipient of the
Library's Insurance
Professional of the
Year Award.

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IPYA SILENT AUCTION ITEM DONORS

**Thank you to those
who donated items to
the silent auction.**

**We also want to thank
everyone who placed a
bid, and to
congratulate the
winning bidders.**

SILENT AUCTION ITEM DONORS

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The Vermont Flannel Company
Vermont National Country Club



SCAVENGER HUNT SPONSORS

The second annual Scavenger Hunt took place on May 10, 2023, around the Financial District and Waterfront, with almost 200 registered participants.

Our third annual Scavenger Hunt will take place on Wednesday, May 8, 2024 (rain date, May 15).



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Corvus Insurance
Gallagher

Garrity Insurance
Risk Strategies Company
Sallop Insurance
Safety Insurance Group

SUMMER INTERN PROGRAM

In 2023, we held our second summer program for member organization interns and early career professionals, with more than 80 registered participants.

The 2024 program will take place June 10 through August 9, and once again will feature educational webinars, an ice cream social, and a professional headshot session.



DONORS TO EXISTING ENDOWMENT FUNDS

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MEMBER ORGANIZATIONS PARTICIPATING IN THE SUMMER INTERN PROGRAM

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Thank you to the member organizations that sponsored our monthly CE-approved webinars in 2023.

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EXECUTIVE DIRECTOR

Michael A. Pezza Jr.
mpezza@insurancelibrary.org
617.227.2087, Ext. 201 or 617.775.3287

STAFF

Sarah R. Hart
Sr. Research Librarian and Education & Event Coordinator
shart@insurancelibrary.org
617.227.2087, Ext 202

Kathy Corey
Accountant & Administrative Specialist
kcorey@insurancelibrary.org
617.227.2087, Ext. 203



The Insurance Library
156 State Street, 2nd Floor
Boston, Massachusetts 02109
617.227.2087
www.insurancelibrary.org

The Insurance Library Association of Boston
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The Library's fiscal year runs July through June.