

Request for Taxpayer Identification Number and Certification

Give Form to the
 requester. Do not
 send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
 See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Oakwood Inclusion Coalition	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. 30 Park Avenue	Requester's name and address (optional) CITY OF OAKWOOD ACCTS PAYABLE 30 PARK AVE OAKWOOD OH 45419
6 City, state, and ZIP code Oakwood, OH 45419	
7 List account number(s) here (optional) [REDACTED]	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number	
[REDACTED]	[REDACTED]
or	
Employer identification number	
8 6 - 1 8 1 9 1 9 8	

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person ▶

Jeremy Neword

Date ▶ 5/5/2021

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor ⁴
For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/identityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

Stacel, Lori

From: Klopsch, Norbert S.
Sent: Tuesday, May 18, 2021 11:34 AM
To: Daniel H Turben (d.turben@icloud.com); Healy Jackson; Iseli, Madeline; Jeremy Newport (newporjd@yahoo.com); Judy G Cook; Kristi Hale (hale@wrightlibrary.org); Leigh Ann Fulford (ladfulford@gmail.com); ramey.kyle@oakwoodschoools.org; Roger Crum (rcrum1@udayton.edu); sdorf1@udayton.edu
Subject: OIC Establishing Document
Attachments: OIC Establishing Document Rv #1 (Crum + Norb) (003) (003).docx; OIC Establishing Document Edits.docx

Below is my last email regarding the Establishing Document.

Attached are...

- The latest mark-up.
- A summary of the proposed changes. I believe that these changes are pretty much self-explanatory and that the only issue that we will probably need to spend a few minutes on is how we define "membership"

I too need to leave the meeting at 5 pm.

See you later, Norb

Norbert S. Klopsch
Oakwood City Manager
(937) 298-0600

From: Klopsch, Norbert S.
Sent: Friday, April 23, 2021 12:55 PM
To: Daniel H Turben (d.turben@icloud.com) <d.turben@icloud.com>; Healy Jackson <healyjackson@gmail.com>; Iseli, Madeline <Madeline.Iseli@sinclair.edu>; Jeremy Newport (newporjd@yahoo.com) <newporjd@yahoo.com>; Judy G Cook <judygcook@woh.rr.com>; Kristi Hale (hale@wrightlibrary.org) <hale@wrightlibrary.org>; Leigh Ann Fulford (ladfulford@gmail.com) <ladfulford@gmail.com>; ramey.kyle@oakwoodschoools.org; Roger Crum (rcrum1@udayton.edu) <rcrum1@udayton.edu>; sdorf1@udayton.edu
Subject: OIC Establishing Document and April 28 Meetings

All,

Sorry for taking so long to respond to the string below. I like Roger's thinking, without exception. I also fully appreciate Kristi's words, particularly given our heavy workloads.

That said, I think the only real meaty issue we have before us has to do with membership. I spoke recently at some length with Judy and also with Healy and think we are starting to figure

out how best to address what membership means. Attached is Roger's mark-up, along with a couple additions from me. The additions basically remove from our OIC the formal "voting" requirement of the general membership. With that done, we can eliminate the distinction between General and Affiliate member... and simply have members, which I really like. Anyone and everyone can be a Member, regardless where they reside... and being a Member simply means that you want to be part of this thing we created... this OIC. And you can be a Member that regularly attends events, or rarely attends. Being a Members simply means that you like what we are doing and, again, want to be part of it, in whatever capacity works for you.

Anyway, I think we are ready to have a good discussion about this at our next Leadership Team meeting.

Regarding April 28, I will likely not be able to participate in the evening meeting. Debbie and I will be in Columbus late that day moving Sam out of his freshman dorm and bringing him (and a carload of stuff) home for the summer. I hope to be able to participate in the 11:30 am meeting regarding the logo. Carol Collins (Leisure Services Director) and Chief Alan Hill (Public Safety Director) will participate in the evening OIC meeting, and I anticipate that two city council members (Vice Mayor Steve Byington and Leigh Turben) will also attend, possibly a third. Carol is acting city manager in my absence, and is prepared to lead a breakout session if needed.

I mentioned before that I watched the Single Story TED Talk several months ago and found it very powerful. I think it will be a great program.

Norb

Norbert S. Klopsch
Oakwood City Manager
(937) 298-0600

From: Roger Crum <rcrum1@udayton.edu>

Sent: Friday, April 16, 2021 7:45 AM

To: Judy Cook <judygcook@woh.rr.com>

Cc: Kristi Hale <hale@wrightlibrary.org>; Klopsch, Norbert S. <Klopsch@oakwood.oh.us>; Daniel H Turben <d.turben@icloud.com>; Healy Jackson <healyjackson@gmail.com>; Iseli, Madeline <Madeline.Iseli@sinclair.edu>; Jeremy Newport <newporjd@yahoo.com>; Leigh Ann Fulford <ladfulford@gmail.com>; Kyle Ramey <ramey.kyle@oakwoodschoools.org>; Samuel Dorf <sdorf1@udayton.edu>

Subject: Re: OIC Establishing Document

dear all

i agree with kristi that i too thought that we were done with this document, but a year's reflection and work on the OIC brought me to a continued sense that that document was just not wholly where it needed to be or might be in two significant details: membership and matters of liaison members. i also agree with judy that our primary focus is on oakwood, but our organization was also founded in a concern for how oakwood interacts with and is perceived by surrounding communities. indeed, it was that external perception that initially brought us together in a concern that such an organization needed to be established. that additional dimension of our purpose and goals is also what we have stated, put in our documents, and expressed to the wider public in press releases. so we have already positioned and advertised ourselves as a community organization that is open to all communities, with and beyond oakwood. on the matter of membership, i wholly anticipate that our membership will always be 99.99 percent composed of residents of oakwood, so i think we stand nothing to lose and everything to gain by changing membership to be simply one category and not a structure of general members and affiliate members. thanks. yours, roger

On Fri, Apr 16, 2021 at 6:53 AM Judy Cook <judygcook@woh.rr.com> wrote:

I think it is important to remember that our mission is about Oakwood and therefore our focus is how best to move forward as a community. It is through success in that mission that the image of 'elitist' will disappear. At this point we cannot agree on how to establish a 'membership' category.' Let's make sure we are being proactive and focused not defensive and protective.

Judy

From: Kristi Hale <hale@wrightlibrary.org>

Sent: Thursday, April 15, 2021 11:16 AM

To: Roger Crum <rcrum1@udayton.edu>; Klopsch, Norbert S. <Klopsch@oakwood.oh.us>

Cc: Daniel H Turben (d.turben@icloud.com) <d.turben@icloud.com>; Healy Jackson <healyjackson@gmail.com>; Iseli, Madeline <Madeline.Iseli@sinclair.edu>; Jeremy Newport (newporjd@yahoo.com) <newporjd@yahoo.com>; Judy G Cook <judygcook@woh.rr.com>; Leigh Ann Fulford (ladfulford@gmail.com) <ladfulford@gmail.com>; ramey.kyle@oakwoodschoools.org; sdorf1@udayton.edu

Subject: RE: OIC Establishing Document

Roger,

Thanks for the input. However, I'll admit to being a little fatigued in that I thought we had already laid most of these points to rest when we passed the document last year. That being said, we are a new organization, and if the majority don't think we have it right, than we can and should put issues back on the table.

Personally, I do not have strong feelings about whether or not we have one or two types of membership. As a non-Oakwood resident, I feel this is for others on the leadership team to decide.

However, on the role of the city, school, and library leaders, I feel we should be members that represent our institutions, just as other institutional leaders will be representing their institutions (faith leaders, business leaders, etc.).

Sounds like we'll have some things to discuss. I'm looking forward to all of your voices.

Kristi

From: Roger Crum [<mailto:rcrum1@udayton.edu>]

Sent: Thursday, April 15, 2021 10:40 AM

To: Klopsch, Norbert S. <Klopsch@oakwood.oh.us>

Cc: Daniel H Turben (d.turben@icloud.com) <d.turben@icloud.com>; Healy Jackson <healyjackson@gmail.com>; Iseli, Madeline <Madeline.Iseli@sinclair.edu>; Jeremy Newport (newporjd@yahoo.com) <newporjd@yahoo.com>; Judy G Cook <judygcook@woh.rr.com>; Kristi Hale <hale@wrightlibrary.org>; Leigh Ann Fulford (ladfulford@gmail.com) <ladfulford@gmail.com>; ramey.kyle@oakwoodschoools.org; sdorf1@udayton.edu

Subject: Re: OIC Establishing Document

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

norb:

thanks for sending this round. please see and consider my editorial suggestions in the attached. in addition to drawing attention to a set of general edits, i would specifically point out the issue of how membership is defined (we presently have "general membership" ---read oakwood citizens--- and "affiliate membership"---read those who are not oakwood citizens. i fear that this sets of a A and B list set of members, and could be perceived externally as elitist . . . Also, i think we need a bit of conversation about whether individuals from the city (norb), the schools (kyle), and the library (kristi) are "members" or "liaisons." my recommendation is that we adhere to the language of "liaison" for these individuals, in the cases in which they are representing those entities (city, schools, and library), reserving to them as citizens/individuals the right and privilege to become members independent of their official roles with this city, schools, or library. in this way, we doubly make sure that the OIC is clearly a citizen-run organization and not an official or veiled wing of the city of oakwood, the schools, or the library. in other words, we are direct and upfront that individuals like norb, kyle, and krist are there as liasons as not as individuals who are guiding the OIC from their official positions.

yours, roger

On Thu, Apr 15, 2021 at 10:13 AM Klopsch, Norbert S. <Klopsch@oakwood.oh.us> wrote:

Greetings...

Attached is the proposed update to our OIC Establishing Document.

Please let me know if you have any suggested edits.

I anticipate that we can have this on the agenda at our April 28 Leadership Team meeting.

Norb

Norbert S. Klopsch

Oakwood City Manager

(937) 298-0600

OAKWOOD INCLUSION COALITION

October 5, 2020

This document establishes the Oakwood Inclusion Coalition (OIC), setting forth the mission and purpose of the ~~Coalition~~ OIC, and the manner in which it shall function.

I. NAME

The name of this organization shall be the Oakwood Inclusion Coalition, regularly abbreviated as (OIC).

II. MISSION

The mission of the OIC is to study, promote, and celebrate an inclusive, equitable, diverse, and welcoming environment and community for everyone who lives, works, visits, or passes through Oakwood.

III. PURPOSE

The purpose of the OIC is to foster an inclusive community through education, development of programs and projects, communication initiatives, and regular attention to matters of intra- and intercommunity relations. As a citizen-driven organization, the OIC is specifically constituted as an organization private citizens and residents of Oakwood and interested parties who are not residents of Oakwood, joined by representatives of the City of Oakwood of government, school Oakwood City Schools, and Wright Memorial Public Library library officials, private citizens, faith, ethnic and cultural leaders, and representatives individuals from the business and media communities in the Oakwood area and beyond. Volunteer officers manage the organization and receive no compensation.

Note: While the OIC will deliver a report annually to the Oakwood City Council, the Oakwood School Board, and the Board of the Wright Memorial Public Library, no substantial part of the OIC's activities or reporting shall involve the express purpose of influencing, modifying, or suspending City, Schools or Library legislation or policies. The organization shall not participate in, or otherwise intervene in, any political campaign on behalf of any candidate for public office or in support of any issue put to vote before the public.

IV. ORGANIZATION

The OIC is organized for educational and community building purposes, and to examine matters of and opportunities to foster diversity, equity, and inclusion. It is established as a 501(c)(3) organization under the Federal Internal Revenue Code. The organization may engage in fundraising efforts to support programming. To this end, a Treasurer will be appointed to oversee all financial activity. No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, officers, or other private persons, except that the organization shall be authorized and

empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the purpose clause hereof.

Notwithstanding any other provision of this document, the OIC shall not carry on other activities not permitted to be carried on by (1) an organization exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or (2) an organization, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or corresponding section of any future federal tax code.

In the event of dissolution of the OIC, its assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not disposed of shall be disposed of by the Court of Common Pleas of the county in which the principal office of the organization is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine that are organized and operated exclusively for such purposes.

V. COALITION MEMBERSHIP

General membership, including eligibility to vote on OIC matters, is open to all individuals who reside in Oakwood, and to representatives of businesses, organizations and religious institutions located in Oakwood. Affiliate membership is open to any other persons interested in furthering the mission and purpose of the OIC. Affiliate members are not eligible to vote on OIC matters. QUESTION: DO WE REALLY WANT TO CREATE TWO TIERS OF MEMBERSHIPS: OAKWOOD CITIZENS AND THOSE WHO ARE NOT? THAT STRIKES ME AS COUNTERPRODUCTIVE AND POTENTIALLY READ AS EXCLUSIVE.

The Membership Committee shall work to identify and retain OIC members from the following groups: NOTE, HERE IS A CONTRADICTION: IN THIS SECTION THESE INDIVIDUALS ARE ALLED "MEMBERS"; IN THE SECTION IMMEDIATELY BELOW, SECTION VI. THESE SAME INDIVIDUALS ARE NOT REFERRED TO AS "MEMBERS" BUT AS "LIAISON" INDIVIDUALS. I WOULD URGE THAT WE STAY WITH THE LANGUAGE, IN ALL CASES VIS-À-VIS THESE INDIVIDUALS AS "LIAISON." THAT WOULD CERTAINLY CLEAR UP UNCERTAINTY ABOUT WHETHER THIS IS AN OFFICIAL CITY, SCHOOL, OR LIBRARY ENTITY.

- a. City of Oakwood (City Manager or designee, Public Safety Director or designee, and one elected official).
- b. Oakwood City Schools (Superintendent or designee, and one elected official).
- c. Wright Memorial Public Library (Director or designee, and one Board member).
- d. Oakwood Historical Society.
- e. Oakwood Sister City Association.
- f. Religious organizations located in Oakwood.
- g. MOMs of Oakwood.
- h. Oakwood Rotary Club.

- i. At least one representative each from business organizations, and minority-owned businesses in Oakwood.
- j. At least one representative from the media.
- k. Members who shall serve to diversify the OIC membership in various capacities, including, but not limited to, religion, race, ethnicity, physical ability, sexual orientation, socio-economic status and age.
- l. Student representatives appointed by their respective school.

The Membership Committee shall identify additional members as it deems important for promoting and enhancing the work of the OIC.

VI. LEADERSHIP TEAM

The Leadership Team of the OIC shall include a Chair, Vice Chair, Treasurer, Secretary, Committee Chairs, two Members-At-Large and one liaison each from the City of Oakwood, the Oakwood City Schools and the Wright Memorial Public Library. The liaison from the City of Oakwood, the Oakwood City Schools and the Wright Memorial Public Library may also serve in another capacity on the Leadership Team. There is no term limit for persons serving on the Leadership Team. ~~These individuals shall each serve a two-year term.~~ The Vice Chair shall serve as Chair Elect. The Immediate Past Chair shall serve on the Leadership Team with ex-officio status, without vote.

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The Chair shall preside over all meetings of the OIC and the Leadership Team. The Vice Chair shall serve in the absence of the Chair. The Treasurer shall be responsible for managing the finances of the OIC. The Secretary shall keep records of all OIC and Leadership Team meetings. The Leadership Team shall meet quarterly, or at the call of the Chair. The Leadership Team shall oversee all activities of the OIC, including the replacement of Leadership Team members when needed. The replacement of Leadership Team members shall be confirmed through a majority vote of the currently serving members. ~~and shall prepare the slate of the Leadership Team for election at the Annual Coalition Meeting.~~

VII. COMMITTEES

The OIC will have the following ~~four~~ ^{three} standing committees:

- a. **Membership Development Committee:** This Committee shall ~~be led by~~ consist of a Committee Chair ~~and four persons~~ appointed by the Leadership Team. Any person who is a General Member ~~Member~~ of the OIC is eligible for Committee membership. The Committee shall be responsible for retaining existing OIC members and for continually identifying new members. The Committee shall ensure ongoing representation from the collaborative entities listed under Section V. COALITION MEMBERSHIP. The Committee shall also be responsible for the orientation of new members.
- b. **Programs and Events Committee:** This Committee shall ~~be led by~~ consist of a Committee Chair ~~and four persons~~ appointed by the Leadership Team. Any person who is a General Member ~~member~~ of the OIC is eligible for Committee membership. The Committee shall be responsible for continually identifying,

planning and conducting programs and events that further the mission and purpose of the OIC.

- c. Current Issues Committee: This Committee shall be led by ~~consist of the~~ Committee Chair and four persons appointed by the Leadership Team. Any person who is a General Member ~~member~~ of the OIC is eligible for Committee membership. The Committee shall be responsible for continually identifying and discussing current issues relating to the mission and purpose of the OIC, and to report on these issues at the Coalition meetings.
- d. Communications Committee: This Committee shall be led by a Committee Chair appointed by the Leadership Team. Any person who is a General Member ~~member~~ of the OIC is eligible for Committee membership. The Committee shall be responsible for generating OIC internal and external communications consistent with the OIC Communications Protocol approved by the OIC Leadership Team.

The OIC may form other committees as deemed beneficial in fulfilling the mission and purpose of the organization. The name, purpose and membership of the OIC's subsidiary committees shall be developed by the Leadership Team, ~~and confirmed by a majority vote of the OIC membership.~~

VIII. COMMUNICATIONS PROTOCOL

The OIC Leadership Team shall establish and approve the protocol for all forms of OIC communications. This includes internal communications with the OIC General and Affiliate Membership ~~membership~~, and external communications with the media and/or any other outside entity or agency. The protocol shall establish procedures for the preparation and approval of all types of communications including, but not limited to, standard mailings, emails, website postings, Facebook and other social media messaging, etc. The protocol shall be attached hereto as Addendum A.

IX. FINANCIAL MANAGEMENT PROTOCOL

The OIC Leadership Team shall establish and approve the protocol for all matters relating to the receipt and disbursement of OIC funds. The protocol shall identify those persons with authority to receive and deposit OIC money, and those persons with authority to approve the disbursement of OIC money. The protocol shall be attached hereto as Addendum B.

VIII. ELECTION OF THE LEADERSHIP TEAM

The Leadership Team shall be elected at the Annual Meeting by a majority vote of the members present. Notice of the date of the Annual Meeting and the Leadership Team slate to be acted upon at the Annual Meeting shall be provided to the members of the OIC at least two weeks in advance of such meeting.

IX.X. NOTICES

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Any notices required under these by-laws shall be in writing, but may be sent via mail, email, or any other method reasonably determined to reach the intended recipients.

~~X.~~XI. COALITION MEETINGS

The OIC shall conduct an Annual Coalition Meeting in January of each calendar year. Subsequent OIC meetings shall take place in April, July and October of each year, unless cancelled by a vote of the Leadership Team. Additional Coalition meetings shall take place upon the call of the Leadership Team. Notice of meetings shall be provided to all OIC members at least two weeks in advance of the meeting date. One-third of the OIC membership shall constitute a quorum.

~~XI.~~XII. ANNUAL REPORT

During the first quarter of each calendar year, the OIC shall publish an Annual Report. The report shall include a summary of the organization's programs and events, and discussions and actions taken by the OIC in the preceding year. Following the publication of the Annual Report, the OIC Leadership Team shall make a public presentation about the work, programming, events and accomplishments of the OIC to the Oakwood City Council, Oakwood City School Board and the Board of the Wright Memorial Public Library.

~~XII.~~XIII. AMENDMENTS

This document may be amended only by a two thirds majority vote of the Leadership Team of the OIC. That vote may be cast in person or by electronic vote at any OIC or Leadership Team meeting, provided that the proposed amendment(s) shall be set forth in the notice of said meeting.

ADOPTED:—_October 5, 2020

REVISED:_____

OIC Establishing Document edits for discussion at May 18, 2021 Leadership Team meeting

- Minor wording changes
- Change:

“While the OIC will deliver a report annually to the Oakwood City Council, the Oakwood School Board and the Board of the Wright Memorial Public Library, no substantial part of the OIC’s activities or reporting shall involve the purpose of influencing, modifying, or suspending city, school or library legislation or policies. The organization shall not participate in, or otherwise intervene in any political campaign on behalf of any candidate for public office or any issue put to vote before the public.”

to:

“Note: While the OIC will deliver a report annually to the Oakwood City Council, the Oakwood School Board, and the Board of the Wright Memorial Public Library, no part of the OIC’s activities or reporting shall involve the express purpose of influencing, modifying, or suspending City, Schools or Library legislation or policies. The organization shall not participate in, or otherwise intervene in, any political campaign on behalf of any candidate for public office or in support of any issue put to vote before the public.”

- Clarify that the city, schools and library liaisons may also serve in other capacities on the Leadership Team.
- Specify that the Leadership Team determines by majority vote the replacement of Leadership Team members when needed.
- Eliminate the number limit for committee members.
- Establish the Communications Committee.
- Require creation of the following two addenda to the Establishing Document:
 - Addendum A – Communications Protocol
 - Addendum B – Financial Management Protocol

Define what it means to be an OIC Member.

Stacel, Lori

From: Klopsch, Norbert S.
Sent: Thursday, May 20, 2021 11:13 AM
To: Kristi Hale; Joshua D. Green; healyjackson@gmail.com; Iseli, Madeline; Jeremy Newport; Judy Cook; Kyle Ramey; LAD; Roger Crum; sdorf1@udayton.edu; Turben, D
Subject: RE: Requesting an e-mail vote

I vote yes. Norb

Norbert S. Klopsch
Oakwood City Manager
(937) 298-0600

From: Kristi Hale <hale@wrightlibrary.org>
Sent: Thursday, May 20, 2021 10:46 AM
To: Joshua D. Green <joshua@the-green-family.org>; healyjackson@gmail.com; Iseli, Madeline <Madeline.Iseli@sinclair.edu>; Jeremy Newport <newporjd@yahoo.com>; Judy Cook <judygcook@woh.rr.com>; Klopsch, Norbert S. <Klopsch@oakwood.oh.us>; Kyle Ramey <ramey.kyle@oakwoodschoools.org>; LAD <ladfulford@gmail.com>; Roger Crum <rcrum1@udayton.edu>; sdorf1@udayton.edu; Turben, D <dan.turben@parknationalbank.com>
Subject: Requesting an e-mail vote

Greetings OIC Leadership Team,

At the May 18 meeting, a motion was made that the "OIC will pursue an RFP for a Community Research Study." The motion was unanimously approved by those present, but it was decided that we wanted all 11 members of the leadership team to vote on the proposal. Attached is a draft of the OIC RFP for Community Research, developed by Madeline and Roger.

Please reply with your vote by e-mail on this matter. Note: This vote only commits the OIC Leadership to seek proposals, and does not obligate the OIC to enter into a contract. The OIC does not currently have adequate funds for this research and will have to do some fundraising for the project.

I have attached the meeting minutes for the May 18 meeting (thank you Sam). You should have received a Doodle poll to set up a time for our next meeting, which should happen very soon to prep for the July public meeting.

Thank you,
Kristi



Kristi J. Hale *Director*
Wright Memorial Public Library

1776 Far Hills Avenue,
Oakwood, OH 45419-2531
Office phone: 937 250-6824 F 937 294-8578
hale@wrightlibrary.org | wrightlibrary.org

Stacel, Lori

From: Klopsch, Norbert S.
Sent: Tuesday, May 25, 2021 2:17 PM
To: Stacel, Lori
Subject: FW: 5 year Jewish Calendar
Attachments: 2021 -2026 5 Year Calendar of Major Jewish Holidays and Religious Observances.pdf

Lori, Please print attached. Thanks, Norb

Norbert S. Klopsch
Oakwood City Manager
(937) 298-0600

From: Kristi Hale <hale@wrightlibrary.org>
Sent: Tuesday, May 25, 2021 1:34 PM
To: healyjackson@gmail.com; Iseli, Madeline <Madeline.Iseli@sinclair.edu>; Jeremy Newport <newporjd@yahoo.com>; Judy Cook <judygcook@woh.rr.com>; Klopsch, Norbert S. <Klopsch@oakwood.oh.us>; Kyle Ramey <ramey.kyle@oakwoodschoools.org>; LAD <ladfulford@gmail.com>; Roger Crum <rcrum1@udayton.edu>; sdorf1@udayton.edu; Turben, D <dan.turben@parknationalbank.com>
Subject: 5 year Jewish Calendar

OIC Leadership,

The Dayton Jewish Community Relations Council mailed me several copies of this very useful 5 year calendar of Jewish Holidays. Please feel free to share with your organizations.

Kristi



Kristi J. Hale *Director*
Wright Memorial Public Library

1776 Far Hills Avenue,
Oakwood, OH 45419-2531
Office phone: 937 250-6824 F 937 294-8578
hale@wrightlibrary.org | wrightlibrary.org

Jewish Holidays All Jewish holidays begin at sundown the evening before the day listed.

Rosh HaShanah and Yom Kippur are the holiest days of the year; expect Jewish students to be absent from school and extra-curricular activities.

Bolded days and dates highlight religious observances and possible absence from work, school, or extracurricular activities.

Pesach has specific dietary requirements.

	FALL	2021	2022	2023	2024	2025
Rosh HaShanah Jewish New Year		Tuesday–Wednesday, September 7–8	Monday–Tuesday, September 26–27	Saturday–Sunday, September 16–17	Thursday–Friday, October 3–4	Tuesday–Wednesday, September 23–24
Yom Kippur Day of Atonement		Thursday, September 16	Wednesday, October 5	Monday, September 25	Saturday, October 12	Thursday, October 2
Sukkot Harvest festival		Tues–Wed, September 21–22 Thurs–Mon, September 23–27	Mon–Tues, October 10–11 Wed–Sun, October 12–16	Sat–Sun, Sept 30–Oct 1 Mon–Fri, October 2–6	Thurs–Fri, October 17–18 Sat–Wed, October 19–23	Tues–Wed, October 7–8 Thurs–Mon, October 9–13
Shemini Atzeret Assembly of the Eighth Day		Tuesday, September 28	Monday, October 17	Saturday, October 7	Thursday, October 24	Tuesday, October 14
Simchat Torah Celebration of the Torah		Wednesday, September 29	Tuesday, October 18	Sunday, October 8	Friday, October 25	Wednesday, October 15
Chanukah Festival of Lights		Monday–Monday, November 29–December 6	Monday–Monday, December 19–26	Friday–Friday, December 8–15	Thursday–Thursday, December 26–January 2	Thursday–Thursday, December 26–January 2
	SPRING	2022	2023	2024	2025	2026
Purim Feast of Esther		Thursday, March 17	Tuesday, March 7	Sunday, March 24	Friday, March 14	Tuesday, March 3
Pesach Passover		Sat–Sun, April 16–17 Fri–Sat, April 22–23	Thurs–Fri, April 6–7 Wed–Thurs, April 12–13	Tues–Wed, April 23–24 Mon–Tues, April 29–30	Wed–Thurs, April 1–2 Wed–Thurs, April 8–9	Thurs–Fri, April 2–3 Wed–Thurs, April 8–9
Yom HaShoah Holocaust Remembrance Day		Thursday, April 28	Monday, May 6	Sunday, May 5	Friday, April 25	Tuesday, April 14
Yom HaZikaron Israel's Memorial Day		Wednesday, May 4	Tuesday, April 25	Monday, May 13	Wednesday, April 30	Tuesday, April 21
Yom HaAtzmaut Israeli Independence Day		Thursday, May 5	Tuesday, April 26	Monday, May 13	Saturday, May 3	Wednesday, April 22
Shavuot Festival of Weeks		Sunday–Monday, June 5–6	Friday–Saturday, May 26–27	Wednesday–Thursday, June 12–13	Monday–Tuesday, June 2–3	Friday–Saturday, May 22–23

This calendar encourages public awareness of Jewish religious observances. The Jewish Calendar is also called the Hebrew Calendar and follows the lunisolar cycle keeping in sync with the natural cycles of the Sun and Moon; each month begins with a new moon. The Jewish Calendar determines when Jewish holidays begin and end. Our hope is that this calendar will assist with scheduling any events. There is a wide variation of Jewish practices that may determine how individuals and families observe their holidays. Jewish Holidays begin the evening before a few minutes before sundown and conclude the following day with three stars in the sky.

Shabbat is the Jewish weekly "day of rest" which begins a few minutes before sundown on Friday and concludes with three stars in the sky, Saturday evening. The Sabbath is considered the most sacred observance in Judaism.

***Rosh HaShanah** (Head of Year) is the Jewish New Year and the first of the Jewish Holy Days marking the beginning of a period of repentance and prayer that ends with Yom Kippur. Rosh HaShanah is observed for either one or two days.

***Yom Kippur** (The Day of Atonement) is when the Jewish people ask for forgiveness for the wrongs committed over the past year. Fasting and refraining from work and leisure provides time and space for deep prayer and reflection.

Sukkot (Booths) is a festival marking the time of the harvest. Booths or huts are temporarily erected for sleep, meals, and prayer to commemorate the harvest times of ancient Israel.

Shemini Atzeret (Assembly of the Eighth Day) arrives at the conclusion of Sukkot. In Israel, Shemini Atzeret marks the beginning of the rainy season.

Simchat Torah (Rejoicing in the Torah) celebrates the conclusion of the yearly reading of the Hebrew Bible and the festivity of beginning the reading again. Simchat Torah marks the end of the fall holidays.

Chanukah (Festival of Lights) is a minor Jewish holiday. Celebrated for eight nights, Chanukah commemorates the victory of the Maccabees and rededication of the Temple in Jerusalem. Many different English phonetic spellings of this holiday such as Hanukkah and Hannukah, bring additional notoriety to this well-known festival of lights.

Purim (Feast of Lots) is a joyous holiday recounting the saving of the Jewish people from a threatened massacre during the Persian period of 539-330 BCE. The Book of Esther is read during Purim.

Passover or Pesach (Passed Over) is one of three pilgrimage festivals of ancient Israel and commemorates the Exodus from Egypt. Passover is celebrated with a ritual meal. Seder, which means order, provides a place for discussion about Freedom and Social Justice. Unleavened bread, known as matzah, is eaten during Passover to mark the time in ancient Egypt when the Israelites had to flee from persecution and did not have time for their bread to rise.

Yom Hashoah (Day of Holocaust Remembrance) for those who perished during the Holocaust. This day of Remembrance began in 1953 and is a time for Holocaust survivors and their families to be recognized.

Yom HaZikaron (Israel's Memorial Day) honors Israel's fallen soldiers and precedes Israel's Independence Day.

Yom Ha'Atzmaut (Israel Independence Day) celebrates Israel's independence from the British Mandate in 1948.

Shavuot (Feast of Weeks) is another of the three pilgrimage festivals marking the giving of the Torah at Mt. Sinai.

For further information on Jewish Holidays and Celebrations:

www.myjewishlearning.com
www.jewishvirtuallibrary.org
www.hebcal.com

*Rosh HaShanah and Yom Kippur are the holiest days of the year; expect Jewish students to be absent from school and extra-curricular activities.

JCRC Mission Statement

To ensure the growth, resilience, and safety of the Jewish people in our community and nation, Israel, and throughout the world. The JCRC works in collaboration with the greater Dayton community to foster cultural humility and advocate for a just, democratic, and pluralistic mosaic society.

JCRC Commitment

EDUCATE—ADVOCATE—ACT

Marcy L. Paul, PhD
 Director, Jewish Community Relations Council
mpaul@jfgd.net

Megan Ullom
 JCRC Administrative Assistant
mullom@jfgd.net

The Boonshoft Center for Jewish Culture and Education is home to the Jewish Federation, the Jewish Community Center, Jewish Family Services, the Jewish Foundation, and the Dayton Jewish Observer.

525 Versailles Drive
 Centerville, Ohio 45459
 Phone: 937-610-1555 • Fax: 937-853-0378
www.jewishdayton.org

2021 - 2026
5 YEAR CALENDAR
of Major Jewish Holidays & Religious Observances

DAYTON JCRC | Jewish Community Relations Council

This calendar is also available online at JewishDayton.org.

Stacel, Lori

From: Klopsch, Norbert S.
Sent: Tuesday, May 25, 2021 4:00 PM
To: Kristi Hale (hale@wrightlibrary.org); Judy Cook; ramey.kyle@oakwoodschoools.org
Subject: FW: Wright Library failing it's role to promote freedom of thought

Kristi, Judy and Kyle,

If we are really going to reach the congregation, I think we need to be open to suggestions like this.

Norb

Norbert S. Klopsch
Oakwood City Manager
(937) 298-0600

From: Julia <juliacampbell@protonmail.com>
Sent: Tuesday, May 25, 2021 3:53 PM
To: hale@wrightlibrary.org
Cc: s Dorf1@udayton.edu; madeline.iseli@gmail.com; healyjackson@gmail.com; ladfulford@gmail.com; ramey.kyle@oakwoodschoools.org; Klopsch, Norbert S. <Klopsch@oakwood.oh.us>; judygcook@woh.rr.com; newporjd@yahoo.com; rcrum1@udayton.edu; dan.turben@parknationalbank.com
Subject: Re: Wright Library failing it's role to promote freedom of thought

Dear Kristi,
I appreciate your quick reply.

Good to know the library (and I hope the OIC) wants to promote all views.

Then, I think the problem for me is what appears to be of a lack of balance and accessibility to opposing views. Here are some suggestions to remedy that.

Thanks for pointing out the link to Other Perspectives with articles on conservative viewpoints. It's good to see you have this, but how do patrons find it on their own? The link could be made more accessible.

Add to your front book display next to the books about racism by liberal writers, books by conservative thinkers. Some authors for example: Shelby Steele, Thomas Sowell, Carol M. Swain, Walter E. Williams, Candace Owens.

Add a bibliography of books on this topic by conservative writers to the other bibliographies you have listed with resources on the OIC site

Finally, include an equal balance of conservative speakers in your programming.

Thank you for taking the time to read and consider my suggestions.

Yours sincerely,
Julia Campbell
Kettering, OH
Fort Worth, TX

And please share my letter to these OIC members without email addresses on the OIC web site: Judy Cook, Jeremy Newport, Dr. Roger Crum, Dan Turben

Sent from ProtonMail mobile

----- Original Message -----

On May 25, 2021, 10:27 AM, Kristi Hale <hale@wrightlibrary.org> wrote:

Julia,

Thank you for contacting me and the rest of the OIC leadership with your point of view. Speaking as the Wright Library director, I very much appreciate the opportunity to clarify and respond.

It is not Wright Library's practice to promote a single view, nor any view. Our programs are meant to foster conversation and provide information:

- The "Let's Talk" series allows people of all viewpoints to come together in a safe space and explore ideas different from their own, with the goal of discovering what we have in common rather than where we differ. We have taken on many social topics, including, but not solely, issues of race. Wright Library has no influence on who shows up to these programs, or the viewpoints they share, but we create a safe environment for effective communication by emphasizing respect, active listening, and curiosity.
- At the "Let's Talk" programs on race issues, the Library received many requests from participants to offer some educational programs on issues of race. This prompted us to host a "Racism 101" program series, in partnership with SURJOhio. The programs were educational in nature, and not intended to be persuasive or political. However, it seems at this stressful time in our society, all discussions of race end up becoming political. I regret that our programs have been viewed so.

I would like to learn more about your ideas for presenting other sides of racial issues, as Wright Library believes deeply in providing information that represents many viewpoints. We include resources representing "Other Perspectives" on our web pages on race issues, and we'd like to add more to this. I'm sure there are other opportunities as well.

Would you have time for a phone call to discuss? Thank you again for taking the time to share your view.

Sincerely,
Kristi



Kristi J. Hale *Director*
Wright Memorial Public Library

1776 Far Hills Avenue,
Oakwood, OH 45419-2531
Office phone: 937 250-6824 F 937 294-8578
hale@wrightlibrary.org | wrightlibrary.org

From: Julia [<mailto:juliacampbell@protonmail.com>]
Sent: Monday, May 24, 2021 11:14 PM
To: Kristi Hale <hale@wrightlibrary.org>
Cc: sdorf1 <sdorf1@udayton.edu>; madeline.iseli <madeline.iseli@gmail.com>; healyjackson <healyjackson@gmail.com>; ladfulford <ladfulford@gmail.com>; ramey.kyle <ramey.kyle@oakwoodschoools.org>; klopsch <klopsch@oakwood.oh.us>
Subject: Wright Library failing it's role to promote freedom of thought

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Dear Kristi J. Hale & OIC Leadership Team,

I have family living in Oakwood who, for the past two years, I have been visiting regularly every few months. When here, I enjoy going to the Wright Library. Your staff is always friendly and helpful to me. And I benefit from the availability of your many resources.

I am upset though to see the Wright Library (and the OIC) pushing forward the Democratic party view---that our country, including Oakwood, is systemically racist. While I disagree with that view (I do not believe we are a racist country.), that is not why I'm upset with the library. I am disturbed that the Wright Library is promoting this one view, and excluding all others. That is not the library's place.

Instead of promoting this single viewpoint, I encourage the library to present to your community all sides of the racial issue, and all sides of the disagreements between and within our political parties. Serving Oakwood in this way, you will be promoting what is unique to America, not control of thought, but freedom of thought.

Yours respectfully,
Julia Campbell
Kettering, OH
Fort Worth, TX

Please share my letter to these OIC members who did not have an email address on the OIC web site: Judy Cook, Jeremy Newport, Dr. Roger Crum, Dan Turben

Sent from ProtonMail mobile

Stacel, Lori

From: Klopsch, Norbert S.
Sent: Tuesday, May 25, 2021 4:48 PM
To: Kristi Hale
Cc: Judy Cook;ramey.kyle@oakwoodschoools.org
Subject: RE: Wright Library failing it's role to promote freedom of thought

Kristi,

Your responses were excellent.

Thanks, Norb

On May 25, 2021 4:28 PM, Kristi Hale <hale@wrightlibrary.org> wrote:
Agreed. I hope my responses reflected that.

From: Klopsch, Norbert S. [mailto:Klopsch@oakwood.oh.us]
Sent: Tuesday, May 25, 2021 4:00 PM
To: Kristi Hale <hale@wrightlibrary.org>; Judy Cook <judygcook@woh.rr.com>; ramey.kyle@oakwoodschoools.org
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Oakwood City Manager
(937) 298-0600

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Cc: sdorf1@dayton.edu; madeline.iseli@gmail.com; healyjackson@gmail.com; ladfulford@gmail.com; ramey.kyle@oakwoodschoools.org; Klopsch, Norbert S. <Klopsch@oakwood.oh.us>; judygcook@woh.rr.com; newporjd@yahoo.com; rcrum1@dayton.edu; dan.turben@parknationalbank.com
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Sincerely,
Kristi



Kristi J. Hale *Director*
Wright Memorial Public Library

1776 Far Hills Avenue,
Oakwood, OH 45419-2531
Office phone: 937 250-6824 F 937 294-8578
hale@wrightlibrary.org | wrightlibrary.org

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Sent from ProtonMail mobile

Stacel, Lori

From: Klopsch, Norbert S.
Sent: Thursday, May 27, 2021 3:25 PM
To: Anne Hilton (hilton@oakwood.oh.us); Leigh Turben (turben@oakwood.oh.us); William Duncan (duncan@oakwood.oh.us); Rob Stephens (stephens@oakwood.oh.us); Steve Byington - Oakwood (byington@oakwood.oh.us)
Subject: FW: OIC mail received: IRS 501(c)(3) approval letter
Attachments: 210522 IRS 501c3 Approval Letter .pdf

The OIC is now officially designated a 501(c)(3). Norb

Norbert S. Klopsch
Oakwood City Manager
(937) 298-0600

From: Jacques, Robert
Sent: Thursday, May 27, 2021 2:06 PM
To: Kristi Hale (hale@wrightlibrary.org) <hale@wrightlibrary.org>; Jeremy Newport <newporjd@yahoo.com>; Judy Cook <judygcook@woh.rr.com>
Cc: Klopsch, Norbert S. <Klopsch@oakwood.oh.us>
Subject: OIC mail received: IRS 501(c)(3) approval letter

All, the attached letter arrived today from the IRS. You should retain a copy with your important accounting records. It may be needed from time to time to document your status as an approved 501(c)(3) non-profit organization.

Regards //Rob

Robert F. Jacques, Esq. | Law Director
City of Oakwood | 30 Park Avenue | Oakwood, Ohio 45419
T: (937) 298-0600
F: (937) 297-2940
Jacques@oakwood.oh.us | www.oakwoodohio.gov





Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

OAKWOOD INCLUSION COALITION
30 PARK AVENUE
OAKWOOD, OH 45419

Date:

05/22/2021

Employer ID number:

86-1819198

Person to contact:

Name: Customer Service

ID number: 31954

Telephone: (877) 829-5500

Accounting period ending:

December 31

Public charity status:

170(b)(1)(A)(v)

Form 990 / 990-EZ / 990-N required:

Yes

Effective date of exemption:

January 25, 2021

Contributor deductibility:

Yes

Addendum applies:

No

DLN:
26053453002081

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

Stacel, Lori

From: Klopsch, Norbert S.
Sent: Tuesday, June 8, 2021 11:18 AM
To: Stacel, Lori;Collins, Carol D.;Doug Spitler;Hill, Alan;Jacques, Robert;Stafford, Cindy;Wilder, Jennifer
Subject: FW: Story of Inclusion in the Summer 2021 Historian
Attachments: 20210608100812293.pdf

Fyi, Norb

Norbert S. Klopsch
Oakwood City Manager
(937) 298-0600

From: Kristi Hale <hale@wrightlibrary.org>
Sent: Tuesday, June 8, 2021 10:17 AM
To: healyjackson@gmail.com; Iseli, Madeline <Madeline.Iseli@sinclair.edu>; Jeremy Newport <newporjd@yahoo.com>; Judy Cook <judygcook@woh.rr.com>; Klopsch, Norbert S. <Klopsch@oakwood.oh.us>; Kyle Ramey <ramey.kyle@oakwoodschoools.org>; LAD <ladfulford@gmail.com>; Roger Crum <rcrum1@udayton.edu>; sdorf1@udayton.edu; Turben, D <dan.turben@parknationalbank.com>
Subject: Story of Inclusion in the Summer 2021 Historian

Nice article in the recent issue of The Historian!



Kristi J. Hale Director
Wright Memorial Public Library

1776 Far Hills Avenue,
Oakwood, OH 45419-2531
Office phone: 937 250-6824 F 937 294-8578
hale@wrightlibrary.org | wrightlibrary.org

Previous Resident Shares Story of Inclusion

I moved to Oakwood because at the time my son was attending a local independent school, but I was uncertain I would be able to continue with his tuition payments. Because of that I started researching local public schools in the area and as a result of my research, I felt that Oakwood Schools would be a better fit. Ultimately, I was able to keep my son at the school he attended and graduated from, but having Oakwood High School as a backup was a relief for me.

My initial thoughts of moving and living in Oakwood did not come without fear. Historically, Oakwood was not considered a very diverse community and I have had family and friends that were pulled over numerous times when driving up or down Far Hills. I also remember hearing that the Oakwood community was not very welcoming to people of color. These stories frightened me because I am a woman of color with a son of color, so I often times worried about him and what he was going to experience. But I did not encounter those things and am reading more and more about Oakwood's commitment to become more inclusive and have seen diversity changes throughout.

That being said, I cannot remember a day when I did not feel a sigh of relief or release as I crossed over to Oakwood on my drive home from work. Oakwood was my sanctuary for the time period we lived there, and I have often times thought about moving back. – Antoinette Hampton

Antoinette is the Vice President of Resource and Development for The United Way of the Greater Dayton Area.



Stacel, Lori

From: Klopsch, Norbert S.
Sent: Tuesday, June 8, 2021 11:18 AM
To: Kristi Hale;healyjackson@gmail.com;Iseli, Madeline;Jeremy Newport;Judy Cook;Kyle Ramey;LAD;Roger Crum;sdorf1@udayton.edu;Turben, D
Subject: RE: Story of Inclusion in the Summer 2021 Historian

Thanks Kristi for sharing this.

Norb

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hale@wrightlibrary.org | wrightlibrary.org

Stacel, Lori

From: Klopsch, Norbert S.
Sent: Thursday, June 10, 2021 6:15 PM
To: Daniel H Turben (d.turben@icloud.com); Healy Jackson; Iseli, Madeline; Jeremy Newport (newporjd@yahoo.com); Judy G Cook; Kristi Hale (hale@wrightlibrary.org); Leigh Ann Fulford (ladfulford@gmail.com); ramey.kyle@oakwoodschoools.org; Roger Crum (rcrum1@udayton.edu); sdorf1@udayton.edu
Subject: Revised Establishing Document
Attachments: OIC Establishing Document Rv #2.docx

Greetings...

Attached is the updated Establishing Document.

Given the plethora of previous redlining, I send this to you as a clean document.

The document includes acceptance of all the edits that were shown in the attachment to the May 18 email I sent you. It also includes changes to the Coalition Membership and Leadership Team sections consistent with discussion at our May 18 Leadership Team meeting.

I hope I captured everything correctly. Please let me know if otherwise. As always, zero pride in authorship here.

Take care, Norb

Norbert S. Klopsch
Oakwood City Manager
(937) 298-0600

OAKWOOD INCLUSION COALITION

October 5, 2020

This document establishes the Oakwood Inclusion Coalition (OIC), setting forth the mission and purpose of the OIC, and the manner in which it shall function.

I. NAME

The name of this organization shall be the Oakwood Inclusion Coalition, regularly abbreviated as OIC.

II. MISSION

The mission of the OIC is to study, promote, and celebrate an inclusive, equitable, diverse, and welcoming environment and community for everyone who lives, works, visits, or passes through Oakwood.

III. PURPOSE

The purpose of the OIC is to foster an inclusive community through education, development of programs and projects, communication initiatives, and regular attention to matters of intra- and intercommunity relations. As a citizen-driven organization, the OIC is specifically constituted as an organization of private citizens and residents of Oakwood and interested parties who are not residents of Oakwood, joined by representatives of the City of Oakwood, Oakwood City Schools, and Wright Memorial Public Library, faith, ethnic and cultural leaders, and individuals from the business and media communities in the Oakwood area and beyond. Volunteer officers manage the organization and receive no compensation.

Note: While the OIC will deliver a report annually to the Oakwood City Council, the Oakwood School Board, and the Board of the Wright Memorial Public Library, no part of the OIC's activities or reporting shall involve the express purpose of influencing, modifying, or suspending City, Schools or Library legislation or policies. The organization shall not participate in, or otherwise intervene in, any political campaign on behalf of any candidate for public office or in support of any issue put to vote before the public.

IV. ORGANIZATION

The OIC is organized for educational and community building purposes, and to examine matters of and opportunities to foster diversity, equity, and inclusion. It is established as a 501(c)(3) organization under the Federal Internal Revenue Code. The organization may engage in fundraising efforts to support programming. To this end, a Treasurer will be appointed to oversee all financial activity. No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, officers, or other private persons, except that the organization shall be authorized and empowered to pay

reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the purpose clause hereof.

Notwithstanding any other provision of this document, the OIC shall not carry on other activities not permitted to be carried on by (1) an organization exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or (2) an organization, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or corresponding section of any future federal tax code.

In the event of dissolution of the OIC, its assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not disposed of shall be disposed of by the Court of Common Pleas of the county in which the principal office of the organization is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine that are organized and operated exclusively for such purposes.

V. COALITION MEMBERSHIP

Membership is open to all persons, whether or not they reside in Oakwood. Eligibility to vote on OIC matters is reserved to Oakwood residents.

The Membership Committee shall work to identify and retain OIC liaisons from the following groups:

- a. City of Oakwood (City Manager or designee, Public Safety Director or designee, and one elected official).
- b. Oakwood City Schools (Superintendent or designee, and one elected official).
- c. Wright Memorial Public Library (Director or designee, and one Board member).
- d. Oakwood Historical Society.
- e. Oakwood Sister City Association.
- f. Religious organizations located in Oakwood.
- g. MOMs of Oakwood.
- h. Oakwood Rotary Club.
- i. At least one representative each from business organizations, and minority-owned businesses in Oakwood.
- j. At least one representative from the media.
- k. Members who shall serve to diversify the OIC membership in various capacities, including, but not limited to, religion, race, ethnicity, physical ability, sexual orientation, socio-economic status and age.
- l. Student representatives appointed by their respective school.

The Membership Committee shall identify additional members as it deems important for promoting and enhancing the work of the OIC.

VI. LEADERSHIP TEAM

The Leadership Team of the OIC shall include a Chair, Vice Chair, Treasurer, Secretary, Committee Chairs, one liaison each from the City of Oakwood, the Oakwood City Schools and the Wright Memorial Public Library, and additional Members-At-Large as recommended by the Leadership Team and confirmed by the OIC members. The liaison from the City of Oakwood, the Oakwood City Schools and the Wright Memorial Public Library may also serve in another capacity on the Leadership Team. There is no term limit for persons serving on the Leadership Team. The Vice Chair shall serve as Chair Elect. The Immediate Past Chair shall serve on the Leadership Team with ex-officio status, without vote.

The Chair shall preside over all meetings of the OIC and the Leadership Team. The Vice Chair shall serve in the absence of the Chair. The Treasurer shall be responsible for managing the finances of the OIC. The Secretary shall keep records of all OIC and Leadership Team meetings.

The Leadership Team shall meet quarterly, or more frequently at the call of the Chair, and shall oversee all activities of the OIC. The Leadership Team, by a majority vote, shall approve the temporary appointment/replacement of Leadership Team members when needed during the course of the calendar year. The Leadership Team shall, by a majority vote, prepare the slate of the Leadership Team for the following year to be presented for election at the Annual Coalition Meeting. The replacement of Leadership Team members shall be confirmed through a $\frac{3}{4}$ majority vote of Oakwood residents that are members of the OIC.

VII. COMMITTEES

The OIC will have the following four standing committees:

- a. Membership Development Committee: This Committee shall be led by a Committee Chair appointed by the Leadership Team. Any person who is a member of the OIC is eligible for Committee membership. The Committee shall be responsible for retaining existing OIC members and for continually identifying new members. The Committee shall ensure ongoing representation from the collaborative entities listed under Section V. COALITION MEMBERSHIP. The Committee shall also be responsible for the orientation of new members.
- b. Programs and Events Committee: This Committee shall be led by a Committee Chair appointed by the Leadership Team. Any person who is a member of the OIC is eligible for Committee membership. The Committee shall be responsible for continually identifying, planning and conducting programs and events that further the mission and purpose of the OIC.
- c. Current Issues Committee: This Committee shall be led by a Committee Chair appointed by the Leadership Team. Any person who is a member of the OIC is eligible for Committee membership. The Committee shall be responsible for continually identifying and discussing current issues relating to the mission and purpose of the OIC, and to report on these issues at the Coalition meetings.
- d. Communications Committee: This Committee shall be led by a Committee Chair appointed by the Leadership Team. Any person who is a member of the OIC is eligible for Committee membership. The Committee shall be responsible for

generating OIC internal and external communications consistent with the OIC Communications Protocol approved by the OIC Leadership Team.

The OIC may form other committees as deemed beneficial in fulfilling the mission and purpose of the organization. The name, purpose and membership of the OIC's subsidiary committees shall be developed by the Leadership Team.

VIII. COMMUNICATIONS PROTOCOL

The OIC Leadership Team shall establish and approve the protocol for all forms of OIC communications. This includes internal communications with the OIC membership, and external communications with the media and/or any other outside entity or agency. The protocol shall establish procedures for the preparation and approval of all types of communications including, but not limited to, standard mailings, emails, website postings, Facebook and other social media messaging, etc. The protocol shall be attached hereto as Addendum A.

IX. FINANCIAL MANAGEMENT PROTOCOL

The OIC Leadership Team shall establish and approve the protocol for all matters relating to the receipt and disbursement of OIC funds. The protocol shall identify those persons with authority to receive and deposit OIC money, and those persons with authority to approve the disbursement of OIC money. The protocol shall be attached hereto as Addendum B.

X. NOTICES

Any notices required under these by-laws shall be in writing, but may be sent via mail, email, or any other method reasonably determined to reach the intended recipients.

XI. COALITION MEETINGS

The OIC shall conduct an Annual Coalition Meeting in January of each calendar year. Subsequent OIC meetings shall take place in April, July and October of each year, unless cancelled by a vote of the Leadership Team. Additional Coalition meetings shall take place upon the call of the Leadership Team. Notice of meetings shall be provided to all OIC members at least two weeks in advance of the meeting date. One-third of the OIC membership shall constitute a quorum.

XII. ANNUAL REPORT

During the first quarter of each calendar year, the OIC shall publish an Annual Report. The report shall include a summary of the organization's programs and events, and discussions and actions taken by the OIC in the preceding year. Following the publication of the Annual Report, the OIC Leadership Team shall make a public presentation about the work, programming, events and accomplishments of the OIC to the Oakwood City Council, Oakwood City School Board and the Board of the Wright Memorial Public Library.

XIII. AMENDMENTS

This document may be amended only by a two thirds majority vote of the Leadership Team of the OIC. That vote may be cast in person or by electronic vote at any OIC or Leadership Team meeting, provided that the proposed amendment(s) shall be set forth in the notice of said meeting.

ADOPTED: October 5, 2020

REVISED: _____