

Stacel, Lori

From: Healy Jackson <healyjackson@gmail.com>
Sent: Wednesday, April 28, 2021 1:20 PM
To: healyjakson@gmail.com
Cc: Joshua D. Green; Kristi Hale; Roger Crum; Klopsch, Norbert S.; Madeline Iseli; Judy Cook; Dan Turben; Leigh Ann Fulford; Jeremy Newport; Kyle Ramey; Samuel Dorf
Subject: Re: OIC Minutes

We signed off before I could comment: The quality of the professional work also makes the OIC look like a well-established entity that is here to stay. We're not a reaction and we're here for the long-haul.

Healy

On Apr 28, 2021, at 1:15 PM, Samuel N Dorf <sdorf1@udayton.edu> wrote:

attached.

S

--
Samuel N. Dorf, PhD
Associate Professor
Department of Music
University of Dayton
300 College Park
Dayton, Ohio 45469-2946
Phone: 937.229.3986

[Performing Antiquity: Ancient Greek Music and Dance from Paris to Delphi, 1890-1930](#)

[Anthology to Accompany Gateways to Understanding Music](#)

No one has to do everything. Everyone has to do something...What's your GREEN DOT?

<OICLeadership Team Meeting -- 28 April 2021 Minutes.docx>

Stacel, Lori

From: Roger Crum <rcrum1@udayton.edu>
Sent: Wednesday, April 28, 2021 1:49 PM
To: Klopsch, Norbert S.
Subject: Re: FW: Prep for 4/28 OIC Meeting

ciao norb

excellent note to your group. also, thanks for sending a message, when you do, to eric spina. this will be important on two fronts: one to celebrate the work of UD design students, and two, to signal that the OIC has a significant presence, in this work, of UD faculty members. much appreciated! i think we made absolutely the right decision today in favor of the RPS package. yours, roger

On Wed, Apr 28, 2021 at 1:19 PM Klopsch, Norbert S. <Klopsch@oakwood.oh.us> wrote:

Roger, Below is my note to city council. Thanks for mentioning this. Norb

Norbert S. Klopsch

Oakwood City Manager

(937) 298-0600

From: Klopsch, Norbert S.
Sent: Wednesday, April 28, 2021 1:18 PM
To: Anne Hilton (hilton@oakwood.oh.us) <hilton@oakwood.oh.us>; Leigh Turben (turben@oakwood.oh.us) <turben@oakwood.oh.us>; William Duncan (duncan@oakwood.oh.us) <duncan@oakwood.oh.us>; Rob Stephens (stephens@oakwood.oh.us) <stephens@oakwood.oh.us>; Steve Byington - Oakwood (byington@oakwood.oh.us) <byington@oakwood.oh.us>
Subject: FW: Prep for 4/28 OIC Meeting

For those participating in the Zoom meeting tonight, I think it is important to have your video cameras on, so the other attendees can see you. I believe there are about 100 folks signed up.

Norb

Norbert S. Klopsch

Oakwood City Manager

(937) 298-0600

From: Klopsch, Norbert S.

Sent: Monday, April 26, 2021 3:20 PM

To: Anne Hilton (hilton@oakwood.oh.us) <hilton@oakwood.oh.us>; Leigh Turben (turben@oakwood.oh.us) <turben@oakwood.oh.us>; William Duncan (duncan@oakwood.oh.us) <duncan@oakwood.oh.us>; Rob Stephens (stephens@oakwood.oh.us) <stephens@oakwood.oh.us>; Steve Byington - Oakwood (byington@oakwood.oh.us) <byington@oakwood.oh.us>

Subject: FW: Prep for 4/28 OIC Meeting

Fyi below. Norb

Norbert S. Klopsch

Oakwood City Manager

(937) 298-0600

From: Kristi Hale <hale@wrightlibrary.org>

Sent: Monday, April 26, 2021 2:10 PM

To: Joshua D. Green <joshua@the-green-family.org>; Carter, Michael <Michael.Carter@sinclair.edu>; Victoria Hix <hix@wrightlibrary.org>; Elizabeth Schmidt <schmidt@wrightlibrary.org>; Brian Potts <potts@wrightlibrary.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>

Cc: Carter, Michael <Michael.Carter@sinclair.edu>

Subject: RE: Prep for 4/28 OIC Meeting

OIC Leaders,

If you would like a meeting reminder, please go ahead and register for the meeting at <https://www.oakwoodic.org/event-details/oic-general-membership-meeting-3>.

Jeremy and Norb will not be able to attend. The rest of you will be assigned a small group unless you tell me by Wednesday that you do not wish to do so. For our producer, here's the list of available breakout room leaders:

- o Kristi Hale
- o Judy Cook
- o Roger Crum
- o Sam Dorf
- o Leigh Ann Fulford
- o Madeline Iseli
- o Healy Jackson
- o Kyle Ramey
- o Dan Turben
- o Elizabeth Schmidt
- o Victoria Hix
- o Michael Carter

We have more than 60 registered. Please continue to promote this event to the people you know.

Thank you,

Kristi

From: Kristi Hale

Sent: Friday, April 23, 2021 3:54 PM

To: Joshua D. Green <joshua@the-green-family.org>; Carter, Michael <Michael.Carter@sinclair.edu>; Victoria Hix <Hix@wrightlibrary.org>; Elizabeth Schmidt <Schmidt@wrightlibrary.org>; Brian Potts <Potts@wrightlibrary.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: Prep for 4/28 OIC Meeting

OIC Leadership and Library Support Team,

I've attached the agenda for next Wednesday's General Meeting.

- Wright Library's Brian Potts will again be our event producer, with Josh Green as his backup.
- The program includes a 30 minute breakout session from 7:30 – 8 p.m.
- Here's the preliminary list of discussion leaders for the breakout sessions. Please let me know if you would prefer to be removed from that role (please also let me know if I inadvertently left someone off the list!):
 - Kristi Hale
 - Judy Cook
 - Roger Crum
 - Sam Dorf
 - Leigh Ann Fulford
 - Madeline Iseli
 - Healy Jackson
 - Jeremy Newport
 - Kyle Ramey
 - Dan Turben
 - Elizabeth Schmidt
 - Victoria Hix (need to confirm her availability)
 - Michael Carter – need to confirm his preference
- Each breakout room discussion leader should prepare by reviewing the instructions and questions before the meeting.
 - Instructions and questions are included on the attached agenda under item 5 A – D.
 - I have attached a copy of the OIC Rules of Conduct, which each leader should read to their group at the beginning of the breakout session.
 - There are more discussion questions than needed, so you have choices if dialog starts to lag.

When I last checked, we had 46 people registered. We like to have 4 – 6 people per discussion. It's possible that more than one discussion leader may be assigned to one room, and if so, you can work together or assign one person to take the lead.

Please let me know if you have any questions or suggestions. I think it's going to be a great program. Thank you Michael, Madeline, and Leigh Ann for all your work putting this together!

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: Kristi Hale <hale@wrightlibrary.org>
Sent: Wednesday, April 28, 2021 4:08 PM
To: Joshua D. Green;healyjackson@gmail.com;Iseli, Madeline;Jeremy Newport;Judy Cook;Klopsch, Norbert S.;Kyle Ramey;LAD;Roger Crum;sdorf1@udayton.edu;Turben, D
Subject: Meeting registrations
Attachments: Meeting Registrations for tonight.xlsx

OIC Leadership,

Here's a current list of registrations for tonight's meeting, just for your info.

Thanks,
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

First name	Last name	Email	Response	Checked-in	Total guests	Timestamp	Address
Christa	Agiro	christa.agir	Yes	0	1	4/23/2021 23:25	417 Ridgewood Ave.,
Lucy	Baker	Baker1966	Yes	0	1	4/19/2021 12:47	400 Monterey Avenue
Lindsey	Banning	lberkelmar	Yes	0	1	3/31/2021 18:43	
Jessica	Barnett	jpenbarnet	Yes	0	1	4/27/2021 13:20	
Pam	Beatty	pamela.be	Yes	0	1	4/28/2021 9:20	216 Triangle Avenue,
Jana	Bennett	janambenr	Yes	0	1	4/19/2021 11:11	500 Hathaway Rd, Oak
Michele	Berry	Michele@	Yes	0	1	4/26/2021 22:29	120 Grandon Rd, Oak
Beverly	Blosser	Blosserbev	Yes	0	1	4/25/2021 22:24	717 schrubbs dr, Ketter
Evelyn	Boettcher	evelyn.boe	Yes	0	1	4/19/2021 10:35	342 greenmount blvd,
Jane	Bohman	jane_bohr	Yes	0	1	4/19/2021 12:36	574 Acorn Dr, Oakwo
Trish	BW	trishwillia	Yes	0	1	4/28/2021 9:19	
Steven	Byington	scbyington	Yes	0	1	4/22/2021 13:04	24 W Schantz Ave, Oa
Catherine	Campbell	campbell.c	Yes	0	1	4/26/2021 20:06	
Nancy	Chifala	nkchifala2	Yes	0	1	4/25/2021 19:59	333 Harman Blvd., Oal
Karen	Clarke	karenclarke	Yes	0	1	4/26/2021 17:23	206 Peach Orchard, O
Carol	Collins	collins@oa	Yes	0	1	4/23/2021 13:11	
Rachel	Collopy	collopydr@	Yes	0	1	4/28/2021 10:04	305 Orchard Dr, Oakw
Damien	Connors	Damien.a.c	Yes	0	1	4/26/2021 18:11	701 Shafor Blvd, Oakw
Judy	Cook	judygcook	Yes	0	1	4/26/2021 22:02	927 FAR HILLS AVE. #
Larry	Cooper	scoop5076	Yes	0	1	4/26/2021 15:09	314 Wisteria Drive, Oa
Allyson	Couch	couch.allys	Yes	0	1	4/19/2021 19:47	20 Rubicon Rd., Oakw
Joanna	Cross	jo_109@y	Yes	0	1	4/20/2021 8:31	1517 Hathaway Rd, Da
Shelly	Davies	shellydavi	Yes	0	1	4/19/2021 10:36	2700 Hathaway Rd, Oa
John	Doe	junk@the-	Yes	0	1	4/18/2021 13:10	
Tina	Donovan	tina@tinac	Yes	0	1	4/26/2021 18:15	221 Ridgewood Avenue
Sam	Dorf	samuel.dor	Yes	0	1	4/26/2021 19:07	101 Oak Knoll Dr., Day
Jane	Dunwoodie	my.koala@	Yes	0	1	4/19/2021 10:59	605 Runnymede Rd., C
Becky	Dye	beckymerk	Yes	0	1	4/27/2021 9:12	2727 Hathaway Rd , O
Dan	Edwards	Dje1959@	Yes	0	1	4/27/2021 8:42	25 Hadley Av, Oakwo
Bob	Eling	robert.elin	Yes	0	1	4/26/2021 17:55	69 East Dixon Ave, Da
Emily	Ellis	ERHood79	Yes	0	1	4/25/2021 11:25	,
Joseph	Fulford	fulford.jos	Yes	0	1	4/26/2021 14:24	219 Orchard Dr, Oakw
Leigh Ann	Fulford	ladfulford	Yes	0	1	4/21/2021 18:13	219 Orchard Drive, Oa
Kate	Furmanski	wfurmanst	Yes	0	1	4/19/2021 12:15	
Julie	Goertemill	Jagoerte@	Yes	0	1	4/27/2021 10:57	136 Beverly Place , Oa
Kristi	Hale	hale@wrig	Yes	0	1	4/16/2021 9:46	Wright Memorial Publ
Carly	Hall	MRSCARLY	Yes	0	1	4/23/2021 9:44	413 Corona Avenue, D
Kirsten	Halling	Kirsten.hal	Yes	0	1	4/19/2021 11:01	415 Yriangle Ave , Oak
Elizabeth	Herr	937yes@g	Yes	0	1	4/26/2021 23:02	1804 Far Hills Ave, Oal
Alan	Hill	Hill@oakw	Yes	0	1	4/19/2021 10:59	30 Park Ave, Oakwooc
Anne	Hilton	Anneshank	Yes	0	1	4/22/2021 13:10	900 Harman Ave, Dayl
Susie	Hogue	sjrna1959	Yes	0	1	4/25/2021 7:00	404 Cushing Ave., Kett
Larry	Hollar	larryhollar	Yes	0	1	4/19/2021 11:39	225 Greenmount Blvd
KATHY	HOLLINGS	kathy.holl	Yes	0	1	4/27/2021 10:02	166 STRATHMOOR XIP
Jacquie	Housel	Jacqueline	Yes	0	1	4/19/2021 19:54	1803 Coolidge, Oakwc
Madeline	Iseli	Madeline.i	Yes	0	1	4/26/2021 20:54	38 Beverly Pl, Oakwo

Sheelagh	Jackson	Sheelaghbj	Yes	0	1	4/26/2021 11:44	118 Lonsdale Avenue,
Healy	Jackson	healyjacks	Yes	0	1	4/8/2021 13:56	118 Lonsdale Ave, Oak
Vivian	Johnson	vljohns@g	Yes	0	1	4/27/2021 8:30	339 Telford Avenue, D
Nancy	Jones	njones701	Yes	0	1	4/19/2021 19:14	232, Dellwood Ave, D
Sandra	Kallenberg	sckallen12	Yes	0	1	4/20/2021 13:55	, , OH, United States,
Lauren	Kawai	lgkawai@g	Yes	0	1	4/26/2021 12:11	256 WILTSHIRE BLVD,
Connie	Kearns	ckearns31	Yes	0	1	4/25/2021 18:04	417 Dellwood, Oakwo
Barbara	Kedziora	barbara.ke	Yes	0	1	4/21/2021 19:28	409 Ridgewood Ave, C
Jeanne	Keffer	Jmtkeffer@	Yes	0	1	4/28/2021 8:23	
Erika	Kelly	erikakelly	Yes	0	1	4/19/2021 10:52	, Dayton, OH, United S
Jodi	Kulka	thekulkazo	Yes	0	1	4/26/2021 8:50	604 Shafor Blvd., Oak
Suki	Kwon	Studiosuki	Yes	0	1	4/19/2021 21:44	901 Acorn Dr, Oakwo
Wenbi	Lai	diane4541	Yes	0	1	4/27/2021 9:34	118 Peach Orchard Av
Kimbe	Lange	lange.kimb	Yes	0	1	4/19/2021 10:45	20 Rubicon Road, Oak
Tennille	Love	Tlove1913	Yes	0	1	4/19/2021 10:38	502 W. Stroop Rd., Ke
Jo	Lovelace H	lvlacej@ao	Yes	0	1	4/26/2021 16:18	200 Hornwood drive, I
Brandy	Mariani	Babie_bld	Yes	0	1	4/24/2021 10:58	25 Oak Knoll Dr, Oakw
Barbara	Miller	floweringb	Yes	0	1	4/25/2021 14:12	209 Brydon Road, Day
Joe	Moore	jpmoore11	Yes	0	1	4/26/2021 17:34	361 Claranna Ave, Oak
Sabrina	Neeley	sabrina.ne	Yes	0	1	4/26/2021 16:56	123 Oak Knoll Dr, Oak
Peter	Newman	newmanla	Yes	0	1	4/27/2021 7:17	594 Garden Road, Day
Ashley	OHara	awohara@	Yes	0	1	4/20/2021 20:20	302 Monterey Avenue
Summer	Pachman	summerpa	Yes	0	1	4/23/2021 14:25	
Cadi	Polk	kryoura@	Yes	0	1	4/19/2021 11:08	336 Corona Ave., Dayt
Kyle	Ramey	ramey.kyle	Yes	0	1	4/26/2021 14:31	313 Orchard Dr., Oakv
Nathan	Reiter	Nathan.rei	Yes	0	1	4/24/2021 22:09	45 Dellwood Ave. , Da
Stefan	Rickman	pastorstef	Yes	0	1	4/27/2021 10:21	155 E Thruston Blvd, C
Chris	Roll	chrisroll22	Yes	0	1	4/27/2021 9:02	6429 Kings Grant Pass
Kelley	Roper Garr	Garrity182	Yes	0	1	4/23/2021 17:17	50 Rubicon Road, Oak
Debbie	Ross	Debbielmil	Yes	0	1	4/21/2021 9:19	1500 Devereux Dr, Oa
Chris	Saunders	csaunders	Yes	0	1	4/23/2021 21:38	333 Oakwood Avenue
Joseph	Schenk	jschenk1@	Yes	0	1	4/2/2021 9:30	620 Shafor Blvd, Oakw
Elizabeth	Schmidt	schmidt@	Yes	0	1	4/26/2021 14:31	1776 Far Hills Ave, Oal
Carolyn	Schoeff	schoeffcj@	Yes	0	1	4/20/2021 9:21	115 E Schantz Ave, Oa
Mandy	Shannon	acshannon	Yes	0	1	4/19/2021 11:38	356 DELLWOOD AVE, O
deborah	spears	Kuaana11	Yes	0	1	4/22/2021 9:31	2707 Shroyer , Oakwo
Sue	Sutton	suesutton	Yes	0	1	4/27/2021 18:05	2200 Far Hills Ave # 11
Jamie	Talicska	jaimfallon	Yes	0	1	4/27/2021 21:54	298 Orchard Drive, Oa
Kelly	Thobe	kellymthob	Yes	0	1	4/26/2021 9:09	420 ACORN DRIVE, DA
Shannon	Toll	shannon.tc	Yes	0	1	4/23/2021 9:58	50 Telford Ave, Oakwo
Daniel	Turben	dan.turber	Yes	0	1	4/26/2021 14:34	204 Forrer Blvd, Oakw
Leigh	Turben	Lturben@	Yes	0	1	4/19/2021 10:48	204 Forrer Blvd, Oakw
Genevieve	Uhlman	uhlman.ge	Yes	0	1	4/26/2021 20:00	148 Lookout Drive, Oa
Emily	Vance	vanceemil	Yes	0	1	4/26/2021 19:19	314 Telford Ave , Oakv
Valerie	Weber	Vwebermd	Yes	0	1	4/26/2021 20:33	19 Monterey Rd, Oakv
Nancy	Weishew	kwgnlw@g	Yes	0	1	4/19/2021 10:34	320 Old River Trail, ST
Andrea	White	andrea.wh	Yes	0	1	4/6/2021 12:59	4744 Bokay Dr., Ketter

John	Wilson	Wilsonite2	Yes	0	1	4/25/2021 16:49	306 East drive, Oakwo
Allan	Yarbrough	awyarbr@	Yes	0	1	4/21/2021 8:03	312 Hadley Ave, Dayt

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Stacel, Lori

From: Samuel N Dorf <sdorf1@u Dayton.edu>
Sent: Wednesday, April 28, 2021 9:09 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@u Dayton.edu); Klopsch, Norbert S.; Joshua D. Green
Subject: Minutes from 28 April OIC Meeting
Attachments: OIC minutes (28 April 2021).docx

respectfully submitted.

S

--

Samuel N. Dorf, PhD
Associate Professor
Department of Music
University of Dayton
300 College Park
Dayton, Ohio 45469-2946
Phone: 937.229.3986

Performing Antiquity: Ancient Greek Music and Dance from Paris to Delphi, 1890-1930

Anthology to Accompany Gateways to Understanding Music

No one has to do everything. Everyone has to do something...What's your GREEN DOT?

Minutes
Oakwood Inclusion Coalition (OIC) Meeting
Wednesday, April 28, 2021
7:00 pm
Zoom meeting

Present: Kristi Hale (chair), Judy Cook, Jeremy Newport, Sam Dorf, Healy Jackson, Leigh Ann Fulford, Madeline Iseli, Roger Crum, Dan Turben, Kyle Ramey [add zoom list?]

Excused: Norbert Klopsch

New Business

- I. Welcome: Kristi Hale welcomed members and offered opening words and introduced the standing committees and some of the library resources.
- II. Madeline Iseli introduced Michael Carter, Senior Advisor to the President and Chief Diversity Officer at Sinclair Community College.
- III. Remarks by Michael Carter, Senior Advisor to the President and Chief Diversity Officer at Sinclair Community College.
- IV. Viewing of "The Danger of a Single Story," TED Talk by Chimamanda Ngozi Adichie
- V. Breakout Rooms
- VI. Michael Carter facilitated a group discussion and heard reports from the small groups:
 - Topics that arose included: how differences are emphasized. What is Oakwood's "single story."
 - Members' individual stories were shared as well as strategies for conversation.
 - What stories DON'T we hear? Whose stories don't you hear in a group?
 - Being mindful of cultural taxation and the hidden labor of being an outsider.
- VII. Closing: Leigh Ann Fulford shared that the OIC Summer Big Read will be Isabel Wilkerson's *Caste*. Copies of the book will be available at the Wright Memorial Library. There will also be a new OIC logo and branding package. Next meeting will be Wednesday, July 28th at 7pm.

Meeting adjourned at 8:36pm

Respectfully submitted, Sam Dorf

Stacel, Lori

From: Jeremy Newport <newporjd@yahoo.com>
Sent: Thursday, April 29, 2021 7:57 AM
To: Klopsch, Norbert S.;Judy Cook;Kristi Hale
Subject: Bank Account

So Jeff Wrenn got back to me this week and he was missing forms such as our meeting minutes and also our IRS EIN letter. All that is squared away now.

Can everybody make it to the bank today to sign final documents? If not, he could do DocuSign. Just let me know availability. In addition, he will need our initial deposit to open the account.

Kind regards,
Jeremy Newport

Sent from my iPhone

Stacel, Lori

From: Kristi Hale <hale@wrightlibrary.org>
Sent: Thursday, April 29, 2021 8:45 AM
To: Jeremy Newport;Klopsch, Norbert S.;Judy Cook
Subject: RE: Bank Account

Jeremy,

I'm swamped this week, so I'd prefer DocuSign.

Thank you,
Kristi

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

From: Jeremy Newport [mailto:newporjd@yahoo.com]
Sent: Thursday, April 29, 2021 7:57 AM
To: Norbert S. Klopsch <Klopsch@oakwood.oh.us>; Judy Cook <judygcook@woh.rr.com>;
Kristi Hale <hale@wrightlibrary.org>
Subject: Bank Account

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.

So Jeff Wrenn got back to me this week and he was missing forms such as our meeting minutes and also our IRS EIN letter. All that is squared away now.

Can everybody make it to the bank today to sign final documents? If not, he could do DocuSign. Just let me know availability. In addition, he will need our initial deposit to open the account.

Kind regards,
Jeremy Newport

Sent from my iPhone

Stacel, Lori

From: Stafford, Cindy
Sent: Thursday, April 29, 2021 11:09 AM
To: Klopsch, Norbert S.;Jeremy Newport
Cc: Kristi Hale;Judy Cook;Jacques, Robert;Stafford, Cindy
Subject: RE: Bank Account
Attachments: W9 form revised October 2018.pdf

Jeremy:

We need a completed W-9. I have attached the form. We also need a copy of your IRS approved 501 (c) 3 letter.

Thanks,

Cindy

Cindy S. Stafford, CPA
Finance Director
City of Oakwood
30 Park Avenue
Oakwood, Ohio 45419
(937)298-0402(w)
(937)297-2940(f)
Stafford@oakwood.oh.us

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

From: Klopsch, Norbert S.
Sent: Thursday, April 29, 2021 10:46 AM
To: Jeremy Newport <newporjd@yahoo.com>
Cc: Kristi Hale <hale@wrightlibrary.org>; Judy Cook <judygcook@woh.rr.com>; Stafford, Cindy <stafford@oakwood.oh.us>; Jacques, Robert <Jacques@oakwood.oh.us>
Subject: RE: Bank Account

Jeremy,

Attached are the three invoices from Josh Green that we need to pay as soon as possible.

I am copying Oakwood Finance Director Cindy Stafford and City Attorney Rob Jacques on this email so you three can coordinate whatever is needed for the city to immediately disburse the MLK Funds to our OIC.

Norb

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

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

From: Kristi Hale <hale@wrightlibrary.org>
Sent: Thursday, April 29, 2021 8:45 AM
To: Jeremy Newport <newporjd@yahoo.com>; Klopsch, Norbert S.
<Klopsch@oakwood.oh.us>; Judy Cook <judygcook@woh.rr.com>
Subject: RE: Bank Account

Jeremy,

I'm swamped this week, so I'd prefer DocuSign.

Thank you,
Kristi

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

From: Jeremy Newport [mailto:newporjd@yahoo.com]
Sent: Thursday, April 29, 2021 7:57 AM
To: Norbert S. Klopsch <Klopsch@oakwood.oh.us>; Judy Cook <judygcook@woh.rr.com>;
Kristi Hale <hale@wrightlibrary.org>
Subject: Bank Account

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.

So Jeff Wrenn got back to me this week and he was missing forms such as our meeting minutes and also our IRS EIN letter. All that is squared away now.

Can everybody make it to the bank today to sign final documents? If not, he could do DocuSign. Just let me know availability. In addition, he will need our initial deposit to open the account.

Kind regards,
Jeremy Newport

Sent from my iPhone

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.	<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.</p> <hr/> <p>2 Business name/disregarded entity name, if different from above</p> <hr/> <p>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.</p> <p> <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input 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) ▶ _____ </p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p style="font-size: small;">(Applies to accounts maintained outside the U.S.)</p>
	<p>5 Address (number, street, and apt. or suite no.) See instructions.</p> <hr/> <p>6 City, state, and ZIP code</p> <hr/> <p>7 List account number(s) here (optional)</p>	<p>Requester's name and address (optional)</p> <p>CITY OF OAKWOOD ACCTS PAYABLE 30 PARK AVE OAKWOOD OH 45419</p>

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					
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; border: 1px solid black; height: 20px;"></td> <td style="width: 5%; text-align: center;">-</td> <td style="width: 25%; border: 1px solid black; height: 20px;"></td> <td style="width: 5%; text-align: center;">-</td> <td style="width: 40%; border: 1px solid black; height: 20px;"></td> </tr> </table>		-		-	
	-		-		
or					
Employer identification number					
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; border: 1px solid black; height: 20px;"></td> <td style="width: 5%; text-align: center;">-</td> <td style="width: 70%; border: 1px solid black; height: 20px;"></td> </tr> </table>		-			
	-				

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 ▶	Date ▶
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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 [*]

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: Jeremy Newport <newporjd@yahoo.com>
Sent: Thursday, April 29, 2021 4:00 PM
To: Kristi Hale;Judy Cook;Klopsch, Norbert S.
Subject: Bank Account

Hello OIC Team,

So I've signed all paperwork. Jeff needs final signatures from Judy in person before setup. Once her in person signature is received, he can set up a docuSign for Kristi's final signature.

On the matter of initial deposit, Cindy informed me today she would not be releasing funds to the OIC. She has discussed the matter with Robert Jacques and although we may provide a W9 similar to a vendor, she wants our approved IRS determination letter verifying our 501(c)3 status. The IRS is extremely behind processing applications right now, according to their website they haven't processed any since April of 2020 and are about 900+ applications behind.

Cindy said she needs to confirm with Robert Jacques the legal matters of releasing funds. Calling her back shortly to see where she is with Robert.

Kind regards,
Jeremy Newport

Sent from my iPhone

Stacel, Lori

From: Kristi Hale <hale@wrightlibrary.org>
Sent: Friday, April 30, 2021 10:10 AM
To: Joshua D. Green;healyjackson@gmail.com;Iseli, Madeline;Jeremy Newport;Judy Cook;Klopsch, Norbert S.;Kyle Ramey;LAD;Roger Crum;sdorf1@udayton.edu;Turben, D
Cc: Smith, Susan
Subject: OIC - setting up next leadership team meeting

OIC Leadership,

Great job with the meeting on Wednesday! Thanks to Leigh Ann and Madeline for putting forth a meaningful program. As best I know, we had about 82 participants. One participant in Elizabeth Schmidt's breakout session said that she is in the process of moving from New Jersey to Oakwood. She is a person of color, and she picked Oakwood because of what she read about the OIC. Impact!

I sent out a Doodle poll to set up the next leadership team meeting. Dan, let me know if you didn't get the link and I will send you a link.

Thanks,
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: Kristi Hale <hale@wrightlibrary.org>
Sent: Monday, May 3, 2021 12:00 PM
To: Joshua D. Green;healyjackson@gmail.com;Iseli, Madeline;Jeremy Newport;Judy Cook;Klopsch, Norbert S.;Kyle Ramey;LAD;Roger Crum;sdorf1@udayton.edu;Turben, D
Subject: FW: How Politically Diverse is Oakwood?
Attachments: How Politically Diverse is your neighborhood..PNG

OIC Leadership,

The New York Times offered this political map by address, and Oakwood is purple (versus blue or red), which I found interesting.

Have a good day,
Kristi

From: Reference Desk
Sent: Monday, May 3, 2021 11:49 AM
To: Kristi Hale <hale@wrightlibrary.org>
Cc: Elizabeth Schmidt <schmidt@wrightlibrary.org>; Kate Chesar <chesar@wrightlibrary.org>
Subject: How Politically Diverse is Oakwood?

I captured this great graphic (attached) from the New York Times. Oakwood is purple.

Here's the link - <https://www.nytimes.com/interactive/2021/04/30/opinion/politics/bubble-politics.html?action=click&module=Opinion&pgtype=Homepage>

Elizabeth



Research Librarian
Wright Memorial Public Library

1776 Far Hills Avenue,
Oakwood, OH 45419-2531
T 937 294-7171 | F 937 294-8578
reference@wrightlibrary.org | wrightlibrary.org

Enter your address to see the political party of the
thousand voters closest to you.

Cornell H

New Germ



Whites Corn

Shakerville

Stacel, Lori

From: Leigh Ann Fulford <ladfulford@gmail.com>
Sent: Monday, May 3, 2021 12:04 PM
To: Kristi Hale
Cc: Joshua D. Green;healyjackson@gmail.com;Iseli, Madeline;Jeremy Newport;Judy Cook;Klopsch, Norbert S.;Kyle Ramey;Roger Crum;sdorf1@udayton.edu;Turben, D
Subject: Re: FW: How Politically Diverse is Oakwood?

What a cool tool!

I think highly educated communities are typically more purple than red or blue--I hope we can capture the purpleness in our membership. I don't feel we have done that yet. THANK YOU for sharing!

LA

On Mon, May 3, 2021 at 11:59 AM Kristi Hale <hale@wrightlibrary.org> wrote:

OIC Leadership,

The New York Times offered this political map by address, and Oakwood is purple (versus blue or red), which I found interesting.

Have a good day,

Kristi

From: Reference Desk
Sent: Monday, May 3, 2021 11:49 AM
To: Kristi Hale <hale@wrightlibrary.org>
Cc: Elizabeth Schmidt <schmidt@wrightlibrary.org>; Kate Chesar <chesar@wrightlibrary.org>
Subject: How Politically Diverse is Oakwood?

I captured this great graphic (attached) from the New York Times. Oakwood is purple.

Here's the link - <https://www.nytimes.com/interactive/2021/04/30/opinion/politics/bubble-politics.html?action=click&module=Opinion&pgtype=Homepage>

Elizabeth



Research Librarian

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--

Leigh Ann Fulford

*For there is always light,
if only we're brave enough to see it.
If only we're brave enough to be it.
--Amanda Gorman, "The Hill We Climb"*

Stacel, Lori

From: Kristi Hale <hale@wrightlibrary.org>
Sent: Monday, May 3, 2021 4:50 PM
To: Joshua D. Green;healyjackson@gmail.com;lseli, Madeline;Jeremy Newport;Judy Cook;Klopsch, Norbert S.;Kyle Ramey;LAD;Roger Crum;sdorf1@udayton.edu;Turben, D
Cc: Smith, Susan
Subject: Next OIC Leadership team meeting

OIC Leadership,

Most of you have responded to the Doodle poll – many thanks. It looks like the best date is going to be Tuesday, May 18th at 4 p.m.

I will send a virtual meeting link.

Thanks,
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: Newport, Jeremy <Jeremy.Newport@rsmus.com>
Sent: Wednesday, May 5, 2021 11:33 AM
To: Stafford, Cindy
Cc: Klopsch, Norbert S.;Kristi Hale;Judy Cook;Jacques, Robert
Subject: RE: EXT: Fwd: Bank Account
Attachments: W9 form revised October 2018.pdf

Hello Cindy,

Please see the attached.

Kind regards,

Jeremy Newport
Assurance Manager

RSM has created a [COVID-19 resource center](#) on our website to support you, including a weekly webcast series beginning Wednesday, March 18, to address business continuity planning, tax and regulatory guidance, industry impact, the overall economy and other emerging trends. We are also in touch with officials in Washington, D.C. and the states regarding tax relief. Please [sign up to receive our tax alerts](#) to get updates as they are available.

RSM US LLP
6 S. Patterson Blvd, Dayton, OH 45402
M: 937.408.0007 | E: Jeremy.Newport@rsmus.com | W: www.rsmus.com



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From: "Stafford, Cindy" <stafford@oakwood.oh.us>
Date: April 29, 2021 at 11:10:16 AM EDT
To: "Klopsch, Norbert S." <Klopsch@oakwood.oh.us>, Jeremy Newport <newporjd@yahoo.com>
Cc: Kristi Hale <hale@wrightlibrary.org>, Judy Cook <judygcook@woh.rr.com>, "Jacques, Robert" <Jacques@oakwood.oh.us>, "Stafford, Cindy" <stafford@oakwood.oh.us>
Subject: RE: Bank Account

Jeremy:

We need a completed W-9. I have attached the form. We also need a copy of your IRS approved 501 (c) 3 letter.

Thanks,

Cindy

Cindy S. Stafford, CPA
Finance Director
City of Oakwood
30 Park Avenue
Oakwood, Ohio 45419
(937)298-0402(w)
(937)297-2940(f)
Stafford@oakwood.oh.us

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

From: Klopsch, Norbert S.
Sent: Thursday, April 29, 2021 10:46 AM
To: Jeremy Newport <newporjd@yahoo.com>
Cc: Kristi Hale <hale@wrightlibrary.org>; Judy Cook <judygcook@woh.rr.com>; Stafford, Cindy <stafford@oakwood.oh.us>; Jacques, Robert <Jacques@oakwood.oh.us>
Subject: RE: Bank Account

Jeremy,

Attached are the three invoices from Josh Green that we need to pay as soon as possible.

I am copying Oakwood Finance Director Cindy Stafford and City Attorney Rob Jacques on this email so you three can coordinate whatever is needed for the city to immediately disburse the MLK Funds to our OIC.

Norb

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

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

From: Kristi Hale <hale@wrightlibrary.org>
Sent: Thursday, April 29, 2021 8:45 AM
To: Jeremy Newport <newporjd@yahoo.com>; Klopsch, Norbert S. <Klopsch@oakwood.oh.us>; Judy Cook <judygcook@woh.rr.com>
Subject: RE: Bank Account

Jeremy,

I'm swamped this week, so I'd prefer DocuSign.

Thank you,
Kristi

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

From: Jeremy Newport [<mailto:newporjd@yahoo.com>]
Sent: Thursday, April 29, 2021 7:57 AM
To: Norbert S. Klopsch <Klopsch@oakwood.oh.us>; Judy Cook <judygcook@woh.rr.com>;
Kristi Hale <hale@wrightlibrary.org>
Subject: Bank Account

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.

So Jeff Wrenn got back to me this week and he was missing forms such as our meeting minutes and also our IRS EIN letter. All that is squared away now.

Can everybody make it to the bank today to sign final documents? If not, he could do DocuSign. Just let me know availability. In addition, he will need our initial deposit to open the account.

Kind regards,
Jeremy Newport

Sent from my iPhone