

Outside the Box Inc is a nonprofit organization dedicated to supporting adults with intellectual and developmental disabilities through various programs in Indianapolis and Fishers, Indiana.

Effective Date: 10/31/2022  
**Updated Date: 01/13/2025**

## **Purpose**

The purpose of this Donation Policy is to provide clear guidelines for the acceptance, processing, and management of donations to Outside the Box, Inc. ("the Organization"). This policy ensures that all donations are handled consistently, ethically, and in accordance with applicable federal and state laws, including the laws governing non-profit organizations in Indiana.

## **General Donation Guidelines**

### **A. Types of Donations**

The Organization accepts the following types of donations:

- **Monetary Donations:** Cash, checks, credit card contributions, and electronic funds transfers (EFTs).
- **In-kind Donations:** Goods or services donated in lieu of monetary contributions.
- **Planned Gifts:** Bequests, charitable remainder trusts, and other future planned donations.
- **Securities:** Stocks, bonds, or other securities that are transferable to the Organization.

### **B. Donor Restrictions**

Donors may specify restrictions on their donations, including but not limited to how the funds are used. The Organization will make every reasonable effort to honor these restrictions. However, donations that are overly restrictive or unclear may be declined.

## **C. No Goods or Services in Exchange for Donations**

Outside the Box, Inc., operates as a 501(c)(3) tax-exempt organization, and in accordance with IRS regulations, it does not provide goods or services in exchange for donations, except for token acknowledgments or benefits of nominal value. Any benefits offered to donors will be disclosed to ensure compliance with IRS guidelines.

## **Methods of Donations**

A. Donors may make donations through the following channels:

- **Online:** Via the Organization's website and third-party platforms (e.g., PayPal, Boomerang).
- **By Mail:** Donations via check or money order made payable to Outside the Box., Inc.
- **In Person:** Donations may be made during events or by visiting the Organization's office(s).
- **Planned Giving:** Donors may contact the Organization's development office to discuss planned giving options.
- **Selected Annual Events:** (Chip In, ITB, and other events as scheduled)

## **B. Acknowledgment and Receipts**

The Organization will issue a written acknowledgment for all donations received, which includes the amount donated, date of the donation, and a statement that no goods or services were provided in exchange for the donation, as applicable. For donations of \$250 or more, a detailed receipt will be provided, in compliance with IRS regulations.

## **C. Processing Time**

Donations will be processed promptly upon receipt, and donors will receive acknowledgment within 30 days of the donation.

## **Donation Acceptance Criteria**

### **A. Approval of Donations**

While the Organization welcomes donations of all types, it reserves the right to decline any donation that:

- Is not in alignment with the Organization's mission or objectives.
- Poses potential legal or reputational risk to the Organization.
- Is from a source that violates the Organization's ethical standards or may create a conflict of interest.

### **B. Non-Cash Donations**

The Organization may accept in-kind donations of goods or services. These donations must be approved by the appropriate staff or board member. Donors of non-cash items may be required to complete a donation form, which will list the donated items and their estimated value. The Organization may provide a receipt for the donation but is not responsible for appraising the value of the donated goods.

**{ Donation PDF above }**

### **C. Donations of Securities**

Donors wishing to contribute securities (stocks, bonds, etc.) should contact the Organization's development office to make arrangements for transferring ownership. The value of securities will be determined on the date the gift is transferred to the Organization.

### **D. Anonymous Donations**

The Organization will accept anonymous donations but will respect the donor's request for confidentiality to the fullest extent permitted by law. If requested, the donor's identity will not be disclosed in any public reports or publications.

## **Gift Restrictions and Use of Funds**

### **A. Designated Gifts**

Donors may choose to designate their contributions to a specific program, project, or fund. The Organization will make every effort to use the funds as designated; however, if the designated use becomes obsolete or impractical, the Organization reserves the right to redirect the funds to the closest available program that aligns with the original intent.

### **B. Undesignated Gifts**

Donations made without specific designation will be used where most needed by the Organization, as determined by the Board of Directors or management.

## **Financial Transparency and Accountability**

### **A. Financial Reports**

The Organization is committed to financial transparency and will make annual financial reports, including audited financial statements, available to donors upon request. These reports will also be available on the Organization's website.

### **B. Use of Donations**

The Organization ensures that all donations are used in a manner that directly supports its mission. The Board of Directors, along with the Executive Director, will oversee and monitor the allocation of funds to ensure responsible management and adherence to donor intentions.

## **Ethical Guidelines for Soliciting Donations**

### **A. Donor Privacy**

The Organization is committed to safeguarding the privacy of its donors. Donor information will not be shared with outside parties without prior consent unless required by law. Donors may request to be removed from the Organization's mailing list at any time.

### **B. Conflict of Interest**

The Organization adheres to a strict policy regarding conflicts of interest. Board members, staff, and volunteers must disclose any personal or financial interests that could affect their ability to act in the best interests of the Organization. Any potential conflicts of interest will be addressed according to the Organization's Conflict of Interest Policy.

## **Compliance with Legal Requirements**

### **A. IRS Compliance**

The Organization complies with all IRS regulations for 501(c)(3) organizations regarding charitable donations. It will issue receipts and acknowledgment letters as required by IRS rules, and all donations will be processed and accounted for in accordance with the IRS rules for tax-exempt organizations.

### **B. Indiana State Law**

The Organization adheres to all applicable state laws governing charitable organizations in Indiana, including registration with the Indiana Attorney General's office if required for charitable solicitation purposes.

## **AMENDMENTS**

This Donation Policy may be amended from time to time by the Board of Directors of the Organization. Any significant changes will be communicated to donors, and the updated policy will be made available on the Organization's website.

### **Contact Information:**

For more information about making a donation, please contact:

- [Michelle Miller](#), Executive Director
- [Cat Howard](#), Director of Development
- [Kyrie Forrester](#), Development Administrator

Thank you for supporting Outside the Box, Inc.