

Marine Toys for Tots Program



Standard Operating Procedures (SOP) for Local Toys for Tots Campaigns

2024



1 August 2024

Hello 2024 Toys for Tots Campaign Coordinators,

I am always excited at this time of year as we are all getting ready for a new Marine Toys for Tots campaign! We are only weeks away from our first Annual Coordinator Training Conference outside of the “DMV” – the District/Maryland/Virginia geographic area. St. Louis is a wonderful city, and the Hyatt will host a great conference. I hope to see many of you there in September.

This SOP has a few significant updates for you longtime Local Community Organization (LCO) Coordinators or Marine Forces Reserve Marines/Sailors who are on multiple Coordinator tours. Please don’t throw it aside as you may miss something important. I learn something new each year after re-reading it. Highlights of some very important information are as follows:

a. Section 4.2: To ensure the Foundation is not supplementing campaigns that do not require assistance, those that are self-supporting will not receive additional toys. As an example, a campaign that collects 4,683 toys, purchases 1,085 toys (total of 5,768 toys) and assists 823 children can distribute 7.01 toys per child. There is no reason for the Foundation to supplement a campaign that is that successful.

b. Section 5.14: Please get your After-Action Reports in prior to the end of the day, 15 January 2025. I am confident all Coordinators can get this accomplished...ON TIME and ACCURATELY!

c. Section 6.24: You are not authorized to spend personal funds, i.e., using your own personal credit card, to make purchases for your local campaign. If you do, you will not be reimbursed.

d. Section 11.3: You are not authorized to sell, raffle, exchange, and/or barter expensive donated toys in exchange for money (or something else of value). You must distribute items like Sony PlayStations, expensive LEGO sets, vintage toys that are brand new and still “in the box,” and bicycles, etc. Have a plan for these items as invariably campaigns receive some very expensive donations.

I look forward to a great 77th year of this amazing Program. Each of you Marines, Sailors, and volunteers are the reason why it is so great! Have a very successful 2024 local campaign!

Semper Fidelis,

A handwritten signature in black ink, appearing to read "M D Cooper".

David Cooper
Vice President, Operations

**STANDARD OPERATING PROCEDURES
FOR LOCAL TOYS FOR TOTS CAMPAIGNS**

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- R Volunteer Service Verification Form
- S Blank Certificate of Liability Insurance (COI)
- T Photo Release Authorization (for adults and for children)

GLOSSARY OF ABBREVIATIONS & ACRONYMS	
ACRONYM	DEFINITION
AOR	Area of Responsibility
CEO	Chief Executive Officer
CFC	Combined Federal Campaign
CMC	Commandant of the Marine Corps
CO	Commanding Officer
COI	Certificate of Liability Insurance or Conflict of Interest
CMFR	Commander, Marine Forces Reserve
ForO	Force Order
GIK	Gift in Kind
HQMC	Headquarters Marine Corps
HTC	Home Training Center
I&I	Inspector – Instructor
IRS	Internal Revenue Service
LCO	Local Community Organization
LOI	Letter of Instruction
MFR	Marine Forces Reserve
MCCUU	Marine Corps Combat Utility Uniform
MCL	Marine Corps League
MCO	Marine Corps Order
MFR	Marine Forces Reserve
MOU	Memorandum of Understanding
MTFTF	Marine Toys for Tots Foundation
NIST	National Institute of Standards and Technology
NLT	not later than
OSD	Office of the Secretary of Defense
OMFR	Office of Marine Forces Reserve
PAO	Public Affairs Office(r)
PI&E	Public Information and Education
PII	Personal Identifiable Information
SOP	Standard Operating Procedure
TFT	Toys for Tots
USMC	United States Marine Corps
VP	Vice President

SECTION I --- PURPOSE

1.1 Overall Purpose of Standard Operating Procedures (SOP)

a. The purpose of the Standard Operating Procedures (SOP) for Local Toys for Tots Campaigns is to provide Toys for Tots Coordinators with a source reference document for managing local Toys for Tots (TFT) campaigns. A thorough understanding of this SOP will arm TFT Coordinators with the knowledge required to execute a successful campaign.

This SOP should be used in conjunction with the Marketing Guide published by the Marketing & Development office. You can find that document on the Secure Section, #9 Marketing and Promotional Materials.

1.2 Coordinator Goals

The goal of each Toys for Tots Coordinator is to conduct a successful Christmas toy collection and distribution campaign in the local community that is a credit to the United States Marine Corps. Planning and coordinating a local campaign is a challenging task. This document is designed to make the work of the TFT Coordinator easier by outlining the procedures for conducting an effective campaign.

1.3 Campaign Direction and Management

The Commander, Marine Forces Reserve (CMFR), is tasked by the Commandant of the Marine Corps (CMC) to direct and manage the Marine Corps Reserve Toys for Tots Program (hereafter “the Program” or “the Marine TFT Program”). The Office of Marine Forces Reserve (OMFR), Headquarters Marine Corps (HQMC) exercises staff responsibility for the day-to-day operation and coordination of the Program.

1.4 Campaign Support

a. The Marine Toys for Tots Foundation (MTFTF), an IRS recognized 501(c)(3) not-for-profit public charity, is the fundraising, funding, and support organization for the U. S. Marine Corps Reserve Toys for Tots Program. The Foundation was created at the behest of the U. S. Marine Corps and provides support in accordance with a Memorandum of Understanding (MOU) with CMFR who directs the Marine TFT Program. The Foundation raises funds to support CMFR, its subordinate units, and authorized local community campaigns in their TFT endeavors. The MTFTF Vice President, Operations (VP, Ops) is the principal liaison between the Foundation, OMFR, local Marine Corps Reserve Unit TFT Coordinators and Local Community Organizations (LCO’s) authorized to conduct local community TFT campaigns.

b. As the SOP is hung on the public accessible website, Foundation Staff email addresses are not published in the document. Email addresses may be found in the Secure Section for all Foundation Staff here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure->

[site/foundation-contacts.aspx](http://www.toysfortots.org/site/foundation-contacts.aspx). Please visit the Secure Section or contact the Foundation Staff via telephone to inquire about email addresses. Contact information is listed below:

c.

<u>Foundation</u>	<u>MTFTF Position</u>	<u>Name</u>	<u>Phone Number</u>
Executive Staff	President & CEO	Jim Laster, Lieutenant General, USMC (Ret)	703-640-9433
	Executive Assistant	Sara Mills	703-649-2029
	Director, Information Technology	Matthew McDonald	703-649-2039
	IT Specialist	Steven Boone	703-649-2047
	Director of Finance & Accounting	Melanie Turner	703-649-2027
	Donor Relations & Processing Administrator	Jennifer Laine	703-649-2023
	Administrative Assistant	Christin Jones	703-649-2042
Marketing & Development	Vice President, Marketing & Development	Ted Silvester, Colonel, USMC (Ret)	703-649-2021
	Deputy Vice President, Marketing & Development	Kelley Hardison	703-649-2034
	Deputy Vice President, Business Development	Gunnar Spafford	703-649-2038
	Communications Manager	MaryKate Cobb	703-649-2040
	Marketing Associate, Gift-in-kind (GIK)	JoAnn Roxburgh	703-649-2028
	Community Manager	John Haehn	703-649-2036
	Social Media Manager	Jennifer Bass	703-649-2050
Operations	Vice President, Operations	David Cooper, LtCol, USMC (Ret)	703-649-2022
	Deputy Vice President, Operations	Mike Stuckey, GySgt, USMC (Ret)	703-649-2041
	Operations Accounting Manager	Valerie Anderson	703-649-2024
	Regional Campaign Manager, Region 1	Karen Torrence	703-649-2026
	Regional Campaign Manager, Region 2	Jennifer Campeau	703-649-2035
	Regional Campaign Manager, Region 3	Brianna Roberts	703-649-2033
	Regional Campaign Manager, Region 4	Tatiana Dingle	703-649-2037
	Regional Campaign Manager, Region 5	Tammy Weatherholtz	703-649-2025
	Regional Campaign Manager, Region 6	Katherine Barnes	703-649-2031
	Regional Campaign Manager, Region 7	Angie Gill	703-649-2046
Warehouse Manager	Mike Barclay	703-649-2030	

Foundation Public Web Address: <http://www.toysfortots.org>

1.5 SOP Improvement

The goal is to make this document useful and user-friendly for local campaigns. Marine TFT Coordinators are encouraged to submit, via email, any recommendations for improving this document to the Foundation's Vice President, Operations and the Foundation's Deputy Vice President, Operations.

SECTION II --- PROGRAM ORGANIZATIONS AND RESPONSIBILITIES

2.1 Headquarters, U.S. Marine Corps (HQMC)

a. The Marine Corps Reserve Toys for Tots Program became an official activity of the United States Marine Corps on 6 September 1995 with the concurrence from the Office of the Secretary of Defense (OSD) approving Marine Corps Order (MCO) 5726.14D – c U.S. MARINE CORPS RESERVE TOYS FOR TOTS PROGRAM. The Commandant of the Marine Corps (CMC) directs CMFR to conduct the annual U.S. Marine Corps Reserve Toys for Tots Program as part of the Marine Corps' Community Outreach Program(s).

b. HQMC provides overall program guidance through Marine Corps Order (MCO) 5726.14F – U.S. MARINE CORPS RESERVE TOYS FOR TOTS PROGRAM.

2.2 Marine Forces Reserve (MFR)

a. Exercises cognizance over the U.S. Marine Corps Reserve Toys for Tots Program.

b. Publishes Force Order (ForO) 5000-24.2 – POLICY FOR THE CONDUCT OF THE ANNUAL MARINE CORPS RESERVE TOYS FOR TOTS PROGRAM.

2.3 Marine Toys for Tots Foundation (MTFTF)

Overall, the MTFTF engages in two categories of activities: Program Services and Support Services.

a. Program Services

1) Collection and Toy Distribution: This is the process of obtaining and delivering toys to local Toys for Tots Coordinators and providing the support and assistance those Coordinators need to conduct effective toy collection and distribution campaigns in their communities. Toy collection includes a combination of locally donated toys, those purchased by the Foundation, and those donated by corporations (GIK).

2) Support of Local Coordinators: This involves arranging the creation, publication, manufacture, and delivery of an array of promotional and support materials to local Coordinators. It includes managing all financial matters for local Coordinators as well as updating and publishing an SOP for the conduct of local programs. Concisely stated, this activity encompasses providing a wide range of support to over 860 local Toys for Tots Coordinators and their support groups. Today, there are nearly 52,000 Marines, Marine Corps League members, veteran Marines and volunteers involved in annual campaigns.

3) Education: The Foundation conducts an annual Public Information and Education (PI&E) campaign. This activity is designed to give the public a clear understanding of the benefits that accrue to individuals, communities, and the Nation from Toys for Tots. It increases

visibility and name recognition and serves to call the public to support the overall Program. The campaign includes distributing a series of news releases, distributing TV and radio public service announcements, publishing newsletters, arranging media events and appearances, arranging for national corporations to incorporate information about Toys for Tots into their paid advertisements, conducting special events, maintaining a website, and distributing educational material about Toys for Tots to the general public.

b. Support Services

1) Management and General Activities: This involves accomplishing the spectrum of business management activities necessary to make an organization efficient and effective and to ensure the program and the Foundation operate in compliance with IRS regulations, federal and state laws, and charitable standards.

2) Fundraising: The Foundation pursues a range of fundraising projects each year. Projects include national corporate sponsors, a direct mail campaign, the Combined Federal Campaign (CFC), special events such as golf tournaments, and special projects such as “in memory of/in honor of” donations, and internet donations.

c. Specifically, the Foundation:

1) Determines what organizations, in addition to Marine Corps Reserve Units, are specifically authorized to conduct local community Toys for Tots Campaigns as part of the U.S. Marine Corps Reserve Toys for Tots Program.

2) Provides toys to supplement local Toys for Tots campaigns conducted by Reserve Units and authorized LCO’s.

3) Develops and disseminates annual AAR requirements.

4) Provides administrative, advisory, and logistical assistance and other support to Reserve Units and authorized Local Community Organizations per the Foundation SOP, ForO 5000-24.2, and other agreements with MFR.

5) Receives and manages cash donations and other funds forwarded by Reserve Units and LCO’s authorized to conduct local community Toys for Tots campaigns.

6) Provides promotional and other campaign support materials.

7) Handles state charitable registration filings and files all required IRS forms.

8) Responds to all requirements from charity oversight organizations.

9) Serves as the tax-deductible agent for the program (all donations and other funds that come to the Foundation are tax deductible).

10) Acts as National and Regional fundraising and toy raising agent for Marine Toys for Tots.

11) Coordinates activities and involvement of National and Regional corporate, group, and individual sponsors (those who desire to provide individual support or to conduct a promotion involving Toys for Tots that will benefit the Nationwide program).

12) Promotes National media exposure and public awareness of the Program.

13) Registers and holds the patent and trademark rights to the Marine Toys for Tots name and logo.

14) Acts in cases of illegal use of the Toys for Tots name or logo.

15) Reviews selection criteria/selects the Reserve Unit and LCO Campaigns & Coordinators of the Year.

2.4 **Marine Corps Reserve Units**

a. Exercise cognizance over local U.S. Marine Corps Reserve Toys for Tots Campaigns in their communities.

b. To best support the campaign, Commanding Officers (COs) / Inspector – Instructors (I-Is) will assign the “right” individual as the Local Coordinator – a Marine or Sailor who has exceptional planning skills, is driven to excel, and who has an outgoing and strong personality that will enable him/her to harness volunteer and community support for this strategically important Marine Corps program. Ensure the service member assigned possesses a SECRET security clearance or initiates the paperwork to apply for a security clearance. Of note, the requirement for MFR Coordinators to possess a security clearance does not mean that he/she will have access to classified information. The security clearance satisfies the requirement for all TFT Coordinators to have a background investigation. Once assigned, the Coordinator will receive an Acknowledgement of Responsibilities (AOR) form from the Foundation to be signed by the Coordinator and the Inspector – Instructor or Commanding Officer, then returned to the Foundation prior to the start of the campaign (see [Appendix A](#)).

c. Arrange for at least one Marine Corps League (MCL) Detachment and/or other organization to assist with the annual campaign. Such groups become an important element of the local TFT Program/Team. The MCL Detachment/organization must be capable and prepared to conduct the campaign in the event the reserve unit is mobilized.

d. Become familiar with and have a local implementation plan per the guidance provided in [Appendix N](#) in the case of a unit mobilization. This appendix has been approved by CMFR and the President & CEO, Marine Toys for Tots Foundation. This ensures a local campaign will be conducted in the event a unit is mobilized.

- e. Develop a Plan of Action and Milestone (POA&M) for the conduct of local campaigns.
- f. Develop and conduct local Toys for Tots media/public relations campaigns.
- g. Arrange toy drop off locations with local businesses.
- h. Ensure that toys are collected on a timely basis, sorted as required and staged and distributed to less fortunate children's family directly or through local social service agencies, church groups, or other legitimate organizations.
- i. Send all locally received unsolicited cash contributions and funds raised by supporting organizations to Marine Toys for Tots Foundation following the deposit process outlined in [Section VII](#).
- j. Maintain the ability for the Foundation to contact the Coordinator directly throughout the campaign.
- k. Submit AAR via the Secure Section of the local website. Complete the report and follow the instructions to transmit to the Foundation no later than 15 January each year.

2.5 Local Community Organizations (LCO's)

- a. An organization supporting a nearby Marine Reserve Unit will be required to work with and be guided by the directions of that unit in all matters pertaining to the U.S. Marine Corps Reserve Toys for Tots Program. The local Reserve Unit can authorize this organization to support the Reserve Unit's campaign.
- b. An organization, or individual volunteer wanting to organize a local campaign, which is located too distant from a Reserve Unit to support its Toys for Tots campaign, may submit or have one of its members submit an application to the Marine Toys for Tots Foundation for authorization to conduct a local community campaign in that organization's community (<https://www.toysfortots.org/coordinators-corner/application-start.aspx>). Organization Coordinators or an individual authorized to conduct a local community Toys for Tots campaign must complete and submit this application annually – **not later than 30 June** – and adhere to all Toys for Tots directives as if it were a Marine Corps Reserve Unit.
- c. Individuals or organizations, such as other charities, other non-profits, churches, etc., are not authorized to conduct local community Marine Toys for Tots campaigns without the approval of the Marine Toys for Tots Foundation.
- d. LCO's authorized to conduct local Toys for Tots Campaigns will accomplish the tasks outlined in [Section 5.4](#).

e. Toys for Tots Coordinator applicants will be subject to a criminal/credit/sex offender background check, conducted a minimum of every five-years, to ensure upstanding citizens are associated with the program.

f. Submit Toys for Tots AARs via the Secure Section of the local website. Complete the report and follow the instructions to transmit it to the Foundation not later than 15 January each year.

2.6 The Marine Corps League (MCL)

a. The MCL National Headquarters provides support to CMFR and the President, Marine Toys for Tots Foundation by assigning a National MCL liaison to directly communicate with the Foundation and MCL Detachments throughout the Nation.

b. MCL Detachments are an important force multiplier to the Marine Corps Reserve Toys for Tots Program. Detachments are a special type of LCO. Please see [Section 2.5](#) above for additional requirements and information.

c. MCL Detachments are not permitted to conduct a local community Marine Toys for Tots campaign without approval of the Marine Toys for Tots Foundation.

SECTION III --- DIRECTIVES FOR MARINE TFT PROGRAM

3.1 Key Documents

Documents providing guidance for the annual Marine Corps Reserve Toys for Tots Program are explained in subsequent paragraphs.

3.2 MCO 5726.14F – U.S. MARINE CORPS RESERVE TOYS FOR TOTS PROGRAM

a. This directive provides general guidance for the Toys for Tots program. Toys for Tots Coordinators should review this document prior to beginning each annual Toys for Tots campaign.

b. A copy of MCO 5726.14F is available in the unit's master directives file. Coordinators of approved LCO's needing this order may visit the Foundation's Coordinator's Corner webpage (https://www.toysfortots.org/about_toys_for_tots/coordinators_corner/Default.aspx).

3.3 ForO 5000-24.2 – POLICY FOR THE CONDUCT OF THE ANNUAL MARINE CORPS RESERVE TOYS FOR TOTS PROGRAM

a. The Force Order contains specific and essential information about Toys for Tots. Coordinators must be familiar with this document.

b. The Force Order is periodically updated by MFR and may be viewed on the Foundation's Coordinator's Corner webpage (https://www.toysfortots.org/about_toys_for_tots/coordinators_corner/Default.aspx).

3.4 Memorandum of Understanding Between Marine Forces Reserve and Marine Toys for Tots Foundation

The MOU defines command relationships, direct and general support requirements, and the policies and procedures governing the relationship between MFR and the Marine Toys for Tots Foundation.

3.5 Standard Operating Procedures (SOP) for Local Toys for Tots Campaigns

This document is prepared, printed, and distributed by the Marine Toys for Tots Foundation annually. This document serves as a single reference to help Toys for Tots Coordinators with their annual local campaigns. This document is also available online here: (https://www.toysfortots.org/about_toys_for_tots/coordinators_corner/Default.aspx).

3.6 Foundation Memorandums

Periodically, the Foundation provides directives and guidance through Memorandums that are required to be more persistent than sending out emails. All Memorandums can be found on the

Secure Section here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/> under #8 – Orders, Directives, and Memorandums.

Current Memorandums are listed below:

<u>Memorandum Number</u>	<u>Memorandum Title</u>
2024 Memo 001	Group Sales Transfer
2024 Memo 002	High Value Donations (yet to be published)
2024 Memo 003	Other Than Christmas Campaign Events and Endeavors
2024 Memo 004	Increasing LCO Campaigns
2024 Memo 005	Promotional Materials and Toy Collection Box Process
2024 Memo 006	Process for Requesting Promotional Materials for Events
2024 Memo 007	Partnership with Ryder: Process For Renting Ryder Vehicles

SECTION IV --- MARINE TOYS FOR TOTS FOUNDATION (MTFTF) PROGRAMS AND SUPPORT

4.1 Mission

a. The mission of the MTFTF is to assist the U. S. Marine Corps in providing a tangible sign of hope to children in need at Christmas. This assistance includes supporting the U. S. Marine Corps Reserve Toys for Tots Program by raising funds to provide toys to supplement the collections of local TFT campaigns, to provide promotional and support material and defray the costs of conducting annual TFT campaigns. Other Foundation support includes providing administrative, advisory, financial, logistical, and promotional support to local Marine Toys for Tots Coordinators; managing funds raised and monies donated based on the use of the Marine Toys for Tots name or logo; providing other support the Marine Corps, as a federal agency, cannot provide; and conducting public education and information programs about TFT that call the public to action in support of this patriotic community action program.

b. The United States Marine Corps, the Marine Corps Reserve Toys for Tots Program, and the Marine Toys for Tots Foundation is inclusive and assists all children in need within our capabilities during the Christmas holiday season. Every family in need who registers, no matter their race, ethnicity, religious affiliation, gender, age, sexual orientation, and disability, will receive toys for their children, as long as the local campaign has donated toys to support them.

4.2 Supplemental Toy Program

a. The Foundation purchases toys/books for Marine Corps Reserve Units and LCO's in order to supplement local campaign's collection efforts and to allow local campaigns to meet the need in their area. These purchases, twice annually, are meant to supplement local campaigns, not replace the requirement for local toy and monetary collections. The first supplemental support is purchased by the Foundation and focuses on ages that are frequently less represented by donors and are hard-to-fill categories for local campaigns. The second supplemental support, also purchased by the Foundation, is requested by campaigns on an "as needed" requirement during the first two weeks of December.

b. Initial Supplemental Toy Shipment.

1) Supplemental toys are purchased for campaigns based on size. See below for more information:

- a) Extra Small Campaign: 0 - 999 children assisted in previous year's campaign
- b) Small Campaign: 1000 - 2,499 children assisted in previous year's campaign
- c) Medium Campaign: 2,500 - 7,499 children assisted in previous year's campaign
- d) Large Campaign: 7,500 - 19,999 children assisted in previous year's campaign

e) Extra Large Campaign: 20,000 - 49,999 children assisted in previous year's campaign

f) Double Extra-Large Campaign: 50,000 and above children assisted in previous year's campaign

2) Campaigns will receive the initial supplemental shipment provided that:

a) The campaign's carryover inventory is less than or equal to 35% of the previous year's distribution.

b) The campaign has a fund balance as recorded in the Campaign Financial Report that is less than 125% of the supplemental toy value package (taking into consideration the historical spending amount from the previous year's campaign). For example, the value of the supplemental toy package for a small campaign last year was approximately \$6,000. If the campaign has a balance of \$13,500 or greater in their Campaign Financial Report (after subtracting the amount spent from the previous year), then the campaign will not receive the supplemental toy package.

c) Campaigns that are self-supporting will not receive Supplemental Toys. As an example, a campaign that collects 4,683 toys, purchases 1,085 toys (total of 5,768 toys) and assists 823 children can distribute 7.01 toys per child. There is no reason for the Foundation to supplement a campaign that is that successful.

d) The Foundation Staff understands that there may be exceptions to the three above rules. If a campaign Coordinator determines there is a need for his/her campaign to receive the initial supplemental toy shipment, he/she should contact their Regional Campaign Manager.

e) The suppliers will begin shipping toys and books in early November. The intent is for shipments to arrive at the local campaigns between 12 November (after the Marine Corps Birthday and Veteran's Day) and the Wednesday before Thanksgiving. This provides Coordinators time to assess the status of their inventory, as well as the campaign's individual family and/or organization requests, prior to distribution in December.

b. Second Supplemental Toy Shipment.

1) Normally the Monday after Thanksgiving, local campaigns may request additional support from the Foundation due to a lack of local donations to meet the demand of the campaign's registrations. The quantity of toys purchased and distributed depends on both toy and monetary fundraising success by the Foundation. The request form will be open on the Secure Section after Thanksgiving and will include the following:

a) Requested number of children that the shipment is required to support by age/gender.

b) Verification of shipping address.

c) Description of efforts taken by the campaign to leverage local media to urge the local populace to donate due to a lack of toys to support their community.

d) The online form will pre-populate the campaign's fund balance as recorded in the Campaign Financial Report to ensure the campaign has exhausted its resources to support its anticipated deficiency.

2) After the campaign is completed and AAR's are submitted, the Foundation will look at local campaign financial reports to determine if the local campaign has enough money to fund their second supplement shipment. If so, the Regional Campaign Manager will contact the local Coordinator and transfer funds from the local campaign to the Foundation's account.

4.3 Gift-In-Kind

a. Donations from corporations, i.e., gift in kind (GIK) toys provided to the Foundation, are distributed to local campaign sites. In 2019, the Foundation partnered with one of our long-time toy vendors, Group Sales, to provide third-party logistics (3PL) services for corporate GIK. All corporate GIK will be shipped from the donor to Group Sales. Group Sales will receive those toys, sort them by age/gender, and then ship them to campaigns designated by the Foundation during the Supplemental Toy Program window based on local campaign needs.

4.4 Support/Promotional Material

Each year, the Foundation purchases support and promotional materials for the annual campaign. Details concerning ordering supplies and the items included in a support package can be found in [Section XIII](#).

4.5 Direct Mail

The Foundation conducts a National direct mail campaign to raise funds and to educate and inform the public about the U.S. Marine Corps Reserve Toys for Tots Program. This campaign raises much of the funding for the support and promotional materials and the supplemental toys mentioned above. This campaign has grown each year and, equally important, has contributed to significant increases in donations directly to local campaigns. The Foundation conducts an electronic version of this direct mail campaign also. Electronic solicitations reduce the production costs associated with direct mail and serve as an excellent complement to our direct mail program.

4.6 Regional Campaign Manager Administrative Reviews

At the completion of the annual campaign, Regional Campaign Managers conduct internal administrative reviews of all campaign sites. Information being reviewed includes: 1) type of

unit; 2) date After Action Report (AAR) was submitted; 3) Deposit slips submitted; 4) Verification forms submitted; 5) Accuracy of receipts submitted; 6) Appropriate & inappropriate purchases; 7) Personal reimbursements; 8) Credit card used for all purchases; 9) Secure Section menu tools utilized; 10) Adherence to SOP guidelines; and 11) Accuracy of AAR submission. These audits will further break down each site's donation and purchase history to determine the percentage of funds disbursed for toys, food, gas, clothing, promotions, storage, thank you items, office supplies, public relations, etc. Results of these internal reviews will be used by the Foundation staff to become more familiar with each campaign site, identify classifications of purchases and possible errors in accounting, determine the ratio of toy purchases to other program expenditures, aid in determining Regional and National Coordinators of the year, and inform the subsequent year's application process.

SECTION V --- PROGRAM OVERVIEW

5.1 Background

The U.S. Marine Corps Reserve Toys for Tots Program is an official activity of the U.S. Marine Corps and a mission assigned to MFR. The Commandant of the Marine Corps (CMC) has delegated the authority and responsibility for directing and managing the program to CMFR. **The Marine Toys for Tots Foundation (MTFTF) is the sole authorized fundraising and support organization for the U.S. Marine Corps Reserve Toys for Tots Program.** MTFTF was created at the behest of the Marine Corps, is recognized by the Office of the Secretary of Defense (OSD) as the Program's fundraising and support organization and provides support in accordance with a Memorandum of Understanding (MOU) between CMFR and the President & CEO, MTFTF.

5.2 Annual Local Toys for Tots Campaigns

The concept of the U.S. Marine Corps Reserve Toys for Tots Program is that Toys for Tots Coordinators conduct local community toy collection campaigns from October through December each year. Local TFT Coordinators, working with local social welfare agencies/organizations/groups, church groups and other local philanthropic organizations, normally complete the toy distribution to children in need of the community on or about 20-24 December. **The focus of annual local campaigns is on toy collection and distribution.** Although, fundraising efforts are authorized (see [Section 5.8](#) and [Section 7.2](#)), **the primary focus of local campaigns is the collection and distribution of toys.** It is essential to understand that toy collection campaigns are conducted only in the community (area of responsibility - AOR) in which the local campaign is held. **Soliciting toys from sources outside the local community (area of responsibility) is not permitted.** Such actions encroach on other local campaigns and are unauthorized. See [Section 6.1](#) and [Section 6.2](#) for greater detail concerning Area of Responsibility (AOR) and Locales.

5.3 Marine Forces Reserve (MFR)

a. Marine Forces Reserve directs the activities of the Toys for Tots Coordinators for each Marine Corps Reserve Unit which conducts a local campaign in the community surrounding a Reserve Training Center or Home Training Center (HTC). CMFR has authorized the President & CEO, MTFTF to approve Local Community Organizations (LCOs - MCL Detachments and other groups) to conduct local TFT Campaigns in communities without a Marine Corps Reserve Unit. Since the inception of local organizations supporting a campaign, MTFTF has relaxed the requirement for an organization to support a campaign. Although non-MFR units are still called LCOs, many campaigns are administered by individual volunteer Coordinators without local organization support.

b. MTFTF is tasked to manage the activities of these LCOs. The baseline condition to approve an LCO is that they pass the required criminal, credit, and sex offender background investigation. Once approved, they are required to attend the Annual Marine Toys for Tots

Training Conference held each September locations to be determined. Coordinators conduct their campaigns in accordance with Marine Corps Order 5726.14F, ForO 5000-24.2 and the Foundation Local TFT Campaign SOP. The Force Order and Foundation SOP give specific instructions regarding the conduct of a local TFT campaign. **If a Coordinator is unable or unwilling to follow the rules, policies, and procedures of these documents, they will not be approved for future campaigns.**

5.4 Roles of the Coordinator

a. The principal role of the local TFT Coordinator is to conduct and supervise the planning, organization, coordination, and execution of the annual toy collection and distribution campaign. **Fundraising is not the principal role of the local Coordinator**; however, local Coordinators are authorized to accept unsolicited donations on behalf of MTFTF. The local Coordinator is responsible for the accountability of collected and purchased toys, the proper handling of local campaign funds ([Section VII](#)), and the accurate reporting of all aspects of the campaign through the submission of the AAR. Coordinators accomplish this through the oversight of all aspects of the campaign, ensuring that Marines and/or volunteers are acting responsibly, and funds are used appropriately.

b. Although, not the primary focus of local Coordinators, Coordinators may conduct fundraising projects within their local communities, once approved by their Regional Campaign Manager, events such as golf tournaments, foot races, bicycle races and similar purely voluntary participation and non-invasive events. All funds raised from such events must be forwarded to MTFTF (see [Section VII](#) for greater detail about Fund Handling rules and procedures). Special Events may be authorized as they create goodwill, good visibility for the local campaign, community spirit, and enhance the image of the local campaign and the U.S. Marine Corps.

c. Fundraising Events, i.e., Special Events must be approved by the Regional Campaign Manager. Request approval through the Secure Section by completing the Event Approval Form (<https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/forms/event-approval.aspx>). Also, see [Section 6.22.a.6](#) concerning Special Event additional insurance requirements.

5.5 Prohibitions

Local Coordinators are prohibited from direct mail or door-to-door solicitations, telemarketing, email solicitations, or other intrusive fundraising projects. See [Section 7.2.e](#) for additional information on this topic. The acceptance of gift cards as donations should be avoided, but if they are donated, the gift cards may be used by the Coordinator to purchase toys. **The purchase of gift cards as items to distribute to children is prohibited.** Gift cards are simply too easy to misplace or be stolen. Also, the accountability with their use is difficult and cumbersome at best. The mission of Toys for Tots is to provide toys to children in need, not gift cards.

5.6 Important Documents

The Marine Corps Order (MCO 5726.14F), Force Order (ForO 5000-24.2), this document, the Logbook and Financial Report, and the file copies of correspondence, receipts, etc., should be maintained in an accessible location and readily available to the TFT Coordinator at all times, especially during the October-December time frame. These documents, when consolidated, comprise a turnover folder/binder that must be organized by the current Coordinator. The turnover folder/binder once created, must be maintained and updated so that it is an effective tool to be transitioned to a follow-on Coordinator as necessary. See [Appendix D](#) & [Appendix N](#) for additional information on this topic. All orders, and this SOP are posted on the Foundation website: https://www.toysfortots.org/about_toys_for_tots/coordinators_corner/Default.aspx.

5.7 Coordinator Information

a. One extremely important task is that of keeping the Marine Toys for Tots Foundation informed of the Coordinator's full name, addresses for the campaign's warehouse for supplemental toy and promotional material purposes, telephone number (both a campaign number and a personal number for Foundation purposes only), and an email address of the current Toys for Tots Coordinator (personal/Foundation only). Having current information makes communications with Toys for Tots Coordinators much quicker and enables greater responsiveness by headquarters and support elements. The Foundation will provide current Coordinator address information to OMFR as needed.

b. CONTACT YOUR REGIONAL CAMPAIGN MANAGER AS SOON AS POSSIBLE WHEN YOUR CONTACT INFORMATION CHANGES!

5.8 Fundraising

All donated funds received by the campaign using the Toys for Tots name and logo may be accepted on behalf of and must be forwarded to the Marine Toys for Tots Foundation. Marines are not authorized to solicit cash donations or conduct fundraising projects. Marines are authorized to accept unsolicited cash donations on behalf of the Marine Toys for Tots Foundation. MCL Detachments and LCO's that support Toys for Tots may conduct selected fundraising projects subject to specified conditions. **Marines/Volunteers are NOT authorized to purchase toys/other items using locally donated funds until the local donations have been processed through the Foundation.**

5.9 Fund Handling

As the fundraising and support organization for the U.S. Marine Corps Reserve Toys for Tots Program, MTFTF is responsible for managing all funds donated and raised or received using the Toys for Tots name and logo. The Foundation is an IRS-recognized 501(c)(3) not-for-profit, public charity. Accordingly, donations and funds raised, which are received by MTFTF, are deductible on federal income tax returns. Contributions and funds raised, which are not received by MTFTF, are not tax deductible. MTFTF is the only organization authorized by each state, the District of Columbia, and U.S. territories to receive donations and raise funds using the Toys for Tots name and logo. Therefore, any organization, which accepts donations or raises funds using

the Toys for Tots name and logo that does not forward the donations and funds to MTFTF, is in violation of federal and state laws. Summarized, all funds raised and donations received based on use of the Toys for Tots name and logo must be forwarded to the Foundation in order for donors to be able to declare the donations as tax deductions on federal income tax returns and to protect the local Coordinator, the donors, the integrity of the Toys for Tots program, the Marine Corps and the Foundation. Additionally, forwarding all donations and funds to the Foundation is necessary to ensure that the Toys for Tots program is operated in accordance with the Internal Revenue Service (IRS), state laws and charitable standards.

5.10 Financial Institution Purchase Card

The Financial Institution Purchase Card allows local Coordinators to shop and purchase toys and other items essential to the annual campaign at local vendors and most Foundation-partner wholesale vendors. Purchases can only be made if funds are available in the local Foundation managed account. Once items have been procured using the Purchase Card, follow the procedures outlined in [Section VIII](#) of this SOP to ensure all bills are paid in a timely manner. All accounts are corporate liability accounts. While individual names are embossed on each card for security/accountability reasons, there is no personal liability associated with the purchase card unless improper activities and/or purchases are recorded. The card holder is responsible for the proper care and use of the purchase card. The preferred and principal method of payment for all purchases is the Toys for Tots Purchase Card.

5.11 Account Safeguards

The Foundation earmarks all funds received from local Toys for Tots Coordinators specifically for the benefit of the local communities covered by the campaign. Local Toys for Tots Coordinators can view an online account statement containing deposits, purchases, and, occasionally, transfers from/to the Foundation which is kept current by the Foundation staff. This online statement will enable Coordinators to know the amount of funds available for local purchases. Visit the Secure Section of the local website using the username and password provided by the Foundation staff (both are case sensitive). The Foundation expends funds from a local account when the Coordinator verifies in writing that an invoice/purchase card purchase is legitimate; however, invoices and/or purchase card purchases approaching the due date will be paid with or without verification. The Verification Request form must still be submitted for record keeping purposes. Funds earmarked for a local campaign are not otherwise expended by the Foundation. **Of note, failure to submit Verification Requests and itemized legible receipts in a timely manner will result in TFT Purchase cards being deactivated and campaigns being put on probation. Continued problems with the Coordinator's inability to forward the proper paperwork to the Foundation will result in (1) LCOs disapproved for follow-on campaigns or (2) Marine Unit COs and/or I-Is contacted through the Office of Marine Forces Reserve (OMFR) at Headquarters Marine Corps (HQMC).**

5.12 Local Toy Drop Locations

a. All local toy collection box locations are considered unattended. The Pension Protection Act of 2006 requires that all donors be provided with a receipt for any donation to a charity. **Unattended receptacles are exempt from this requirement. It is imperative that each receptacle have on it the unit and/or campaign name and address to afford all donors the opportunity to record this information in their personal records for use during the preparation of their tax returns.**

b. If Marines and/or volunteers are present at a drop site, it is for carrying out a special event and to answer questions about the Toys for Tots campaign, not to provide tax acknowledge letters to donors.

5.13 Local Toy Donations

To enable the Foundation to provide a complete explanation and description of the U.S. Marine Corps Reserve Toys for Tots Program's impact, there is a system in place to determine the value of local toy donations ([Appendix P](#)). The Foundation utilizes the services of a statistician to analyze and report the average value of locally donated toys. This report is included with other information presented to our financial auditors for examination and verification. The statistician has his representatives contact local Coordinators, visit local campaign sites and collection points, view, photograph, and gather local data and pricing for these items. The statistician compiles the information, analyzes trends, and reports the results to the Foundation. These representatives carry out this assignment annually during late November/early December.

5.14 After Action Reports

a. A critical responsibility of a Coordinator is completing and submitting the Annual After-Action Report (AAR) by the **due date of 15 January**. Located in the Secure Section of the local website, this report contains essential information the Foundation must compile for release to the U.S. Marine Corps, corporate sponsors, independent auditors, the IRS, State Attorneys General, and the American public. It is important to realize that the AAR online form will "timeout" if the Coordinator doesn't remain "active" on the form or by clicking the "submit" button. Should the computer remain idle for an extended period, ALL data entered during the current visit will be LOST. The report may be "submitted" at any time to save any/all information provided. The Coordinator may log into the report as many times as needed/desired until the site locks at midnight (PST), 15 January each year. **IT IS ESSENTIAL THIS REPORT BE COMPLETED AS ACCURATELY AS POSSIBLE AND SUBMITTED ON TIME**, as the AARs inform reports for CMC, CMFR, the auditors, etc.

b. The Weekly Report form is on the Secure Section of the local website. By completing this report each week, information will be automatically added into the AAR. Adjusting entries may be required at the completion of the campaign, but the time and effort needed to complete the AAR will be dramatically reduced by utilizing this online tool. Weekly Reports are available year-round, to allow Coordinators to track donations within the TFT automated system. Weekly Reports feed the AAR which becomes available immediately after the New Year's Day holiday.

The Weekly Report will be available until the AAR has all Foundation supplied information finalized and posted. A sample AAR is in [Appendix Q](#).

5.15 Communication

a. There are many situations where the Foundation may need to communicate with a Coordinator. Of course, the Coordinator must maintain communications with the Foundation from the start of the campaign (1 October) until all administrative requirements have been completed (AAR submitted by 15 January, all Verification Requests and itemized legible receipts have been submitted to pay vendors, etc.). Just as important, Coordinators must be reachable by email and phone throughout the year to answer questions that might arise from annual audit, out-of-cycle GIK donations, inventory questions, etc. **The Foundation must have a direct phone number and email address for all Coordinators.** FOUNDATION ONLY numbers will not be released to the public, but they are essential for a strong Foundation – Coordinator relationship.

b. **Communication with the public, either by email, phone, or social media, MUST BE professional and cordial.** During the more hectic days of the campaign, it is important to have emails (Foundation provided - toysfortots.org) and phones manned by personnel knowledgeable of local activities and procedures. This assures callers that they have reached a professional organization; one which recognizes and responds to calls received, and one which considers its donors and supporters important.

SECTION VI --- GENERAL INSTRUCTIONS FOR TFT CAMPAIGNS

6.1 Area of Responsibility (AOR)

The area of responsibility for a local Toys for Tots campaign is the geographic area that can be supported by the resources the Local Coordinator can muster. Normally, local campaigns have geographic boundaries corresponding to counties. The Foundation verifies with each Local Coordinator annually during the summer to ensure we know what areas across the Nation are covered and not covered.

6.2 Locale

a. Every Marine Home Training Center (HTC) / Local Community Organization (LCO) campaign is in an area having its own geographic and demographic challenges. The Coordinator should obtain as much background information as he/she can from his/her predecessor, civilian volunteers and others who have previously worked with Toys for Tots and understand how it has functioned in the past.

1) Units may be supported by civilian volunteer networks to cover as much territory as possible, but it should not attempt to cover an area that exceeds its capability. Most units have an established area they can manage effectively.

2) The Foundation will not attempt to assign areas of coverage for each campaign site. Toys for Tots Coordinators should work closely with adjacent units/local community campaigns to determine the most effective method of covering as much territory as possible without overlapping coverage, duplicating effort, and confusing the public.

3) Should a contribution be in an area not covered by a Toys for Tots campaign site, and it would be unreasonable to transport the toys to a campaign site, suggest to the donor that the toys be donated to a charity/agency in their local community to benefit local children.

4) As with any other issue that may arise regarding the conduct of a Marine Toys for Tots campaign, any problems related to the geography of your campaign area and/or demographics within that area are too great to list in this SOP. Coordinators must rely upon his/her experience and common sense; however, should clarification be needed LCO TFT Coordinators must contact their Marine Toys for Tots Foundation Regional Campaign Manager. Marine Unit TFT Coordinators should contact the Foundation and OMFR to seek advice/guidance after notifying their chain of command.

6.3 Focus of Effort for Local Toys for Tots Campaigns

a. The primary focus of effort for a local Toys for Tots campaign is the collection and distribution of new, unwrapped toys to children in need within the community at Christmas. To accomplish this, the Coordinator plans for:

1) Positioning toy collection containers throughout the community, retrieving toys from collection sites, storing, sorting, and distributing toys for the bulk of the annual campaign.

2) Conducting local toy donation projects and events are important elements of the annual campaign. The local Toys for Tots Coordinator approves all such projects and events.

a) Marine Reserve Units and LCOs authorized to conduct Toys for Tots campaigns are permitted to authorize toy donation projects only in their own local community – area of responsibility – and only for the current campaign.

b) Marine Reserve Units and LCOs authorized to conduct Toys for Tots campaigns are permitted to authorize selected fundraising projects (see [Section VII](#) for greater detail about Fund Handling rules and procedures) only in their own local community – area of responsibility – and only for the current campaign.

c) Marine Reserve Units and LCOs will not solicit toy donations or authorize the solicitation of funds from individuals, businesses, or other organizations located outside their area of responsibility. Such actions encroach on other local campaigns and are not authorized.

6.4 **Qualifications for a Toys for Tots Coordinator**

a. A Toys for Tots Coordinator should be a mature individual possessing excellent communication and organization skills, and one who can juggle several projects at the same time. He/she should be familiar with the community, the geography of the area, and the people with whom he/she will work. He/she must meet people well, be comfortable in front of a camera and a crowd, must think well on his/her feet, and must remember that as a Toys for Tots Coordinator he/she represents the U.S. Marine Corps always. Of note:

1) **The Coordinator must reside within the community/county that they are responsible for.** This prevents the Coordinator driving significant distances to and from their residence to their area of responsibility (AOR). Shipping address and warehouse must be in the community/county that is being serviced as well.

b. Toys for Tots is the largest single community action and public relations program of the U.S. Marine Corps. An individual equal to the task must be selected.

c. Toys for Tots Coordinators will either possess a valid SECRET security clearance (MFR personnel) or submit to a criminal, credit, and sex offender background check (LCO personnel) every five-years before being assigned the duty (MFR) or being issued a letter of approval to participate (LCO).

d. MFR Coordinators require an Acknowledgement of Responsibilities (AOR) form signed by their CO or I-I (see [Appendix A](#)).

6.5 **Conflict of Interest (COI)**

A COI is defined as a personal interest or relationship that conflicts with the faithful performance of official duty (http://ogc.osd.mil/defense_ethics/topics/conflicts_of_interest.html). In your duties as a Campaign Coordinator, you must not put yourself in a position where there is a conflict of interest or the appearance of a conflict of interest. Coordinators are not to accept gifts, gratuities, free trips, personal property or other items of value from an outside person or organization that could be construed as an inducement to obtain business from the Foundation, e.g., printing, advertising, services, etc.

6.6 **Uniform/Attire for Personnel Involved in Toys for Tots**

a. The uniform/attire for any event must be a judgment call made by the person in charge of the campaign based on the Toys for Tots event. For public appearances, media appearances and non-physical activities, the suggested uniform for Marines is Dress Blue Bravos (or the Service Uniform when appropriate). When involved in toy pick up details or other work details, the suggested uniform is the Marine Corps Combat Utility Uniform (MCCUU). Personnel must use discretion since the MCCUU uniform is not an authorized leave and liberty uniform; however, CMC signed a policy waiver on 19 October 2007 that remains in effect (see <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/documents/CMC%20Waiver%20Authorization.pdf>).

b. Local Toys for Tots Coordinators must dress appropriately for each situation and remember that as a representative of the U.S. Marine Corps, one should always pick up toys or make appearances neatly attired and well groomed. Appearing disheveled and unkempt opens the door to disappointment and criticism from sponsors and donors. When in doubt, “dress up, not down” (General Robert H. Barrow, USMC, 27th Commandant).

6.7 **Other Volunteer Assistance**

a. Local civilian and veteran organizations, committees, or groups may support the U.S. Marine Corps Reserve Toys for Tots Program.

b. These LCOs can support local Reserve Unit Toys for Tots campaigns. If in a community without a Reserve Unit, the organization may conduct a local community campaign upon approval of the Marine Toys for Tots Foundation.

c. These organizations must comply with the provisions of the Marine Corps Order, Force Order, and this SOP when supporting Toys for Tots.

d. [Section II](#) provides specific details about the involvement of organizations other than Marines and Marine Corps League detachments in Toys for Tots.

6.8 **Storage and Warehouse Facilities**

a. One of the first challenges each campaign faces is finding a location to store campaign support material and collected / purchased toys. This facility may act as your distribution center as well. The most advantageous arrangement for a storage / warehouse facility is to have it donated. Many owners / agents that donate facilities will not charge rent but will have the Coordinator pay for utilities. No matter the arrangement, you will most likely need insurance and will be required to sign a lease.

1) Insurance is discussed in [Section 6.22](#).

2) A lease provides the legal terms of the arrangement between a local campaign and the Coordinator. Since the Marine Toys for Tots Foundation is the legal authority as a 501(c)(3) entity, the lease is between the Foundation and the facility owner. The Foundation has authorized LCO Coordinators to sign leases on its behalf.

3) The Foundation does not authorize MFR Coordinators to sign leases. Federal laws and regulations are very clear: Only a contracting officer can purchase goods or services or contract for them on behalf of the government. Without a warrant as a contracting officer, issued by an authorized government official, an individual cannot obligate government funds. Although, the funds obligated when a MFR Marine or Sailor signs a lease are not government funds, the Marine Toys for Tots Foundation uses extreme caution in order to protect servicemembers. **THEREFORE, ALL LEASES BETWEEN MFR PERSONNEL AND STORAGE / WAREHOUSE FACILITIES MUST BE SIGNED BY THE DEPUTY VICE PRESIDENT, OPERATIONS.** Forward all leases via email to mike.stuckey@toysfortots.org, in either .docx format (Microsoft Word) or .pdf. Once the lease is edited and revised, the Deputy Vice President, Operations will forward it back to the Coordinator. The Coordinator will remain the local point of contact with the owner / agent, but the Deputy Vice President, Operations will sign the lease for the Foundation.

4) A copy of all co-signed leases, both MFR unit and LCOs, must be forwarded to the Regional Campaign Managers via the Secure Section here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/forms/lease.aspx>.

6.9 Only New, Unwrapped Toys/Books

a. Since 1980, Marines have collected and distributed only new, unwrapped toys. The rationale for this is (1) Marines do not have time to refurbish used toys, and (2) there could be legal ramifications should the program distribute dangerous or dirty toys that could cause injury or illness to a child. Lastly, one of the Marine Corps' principal goals for the Toys for Tots program is to send a message of hope to less fortunate children. The best way to accomplish this goal is through a shiny, new toy, or a new, exciting book to read. This goal cannot be accomplished through "hand-me-down" toys.

b. Toys should be unwrapped to enable Coordinators and volunteers to determine that the gift is safe for distribution and to identify the appropriate age and gender for each gift.

c. Gift certificates/cards are very popular and sometimes donated to a local campaign. These cards are an easy and safe way for a donor to give money to a charity. In most instances, gift cards will be from toy/department stores. The logical conclusion is that the donor intended the card to be used to purchase toys. This shall be done, and the resulting number of toys purchased should be included in the “Toys Collected” area of the Weekly and After-Action Reports, i.e., gift cards for toys are NOT considered monetary donations. They are immediately converted into toys. Other gift cards donated may be given to assist in overhead costs for a local campaign. In this instance, the cards SHALL be considered a monetary donation, but be used to cover local costs (including, but not limited to gasoline and food for volunteers, tape, and trash/sorting bags). The total value of these “overhead support” gift cards is to be placed in the “Donations Collected” AND the “Donations NOT Forwarded to the Foundation” sections of both the Weekly and After-Action Reports. The comments section of the AAR will explain why funds were kept locally. Such a retention of funds is an exception to the rule and is ONLY allowed for gift card donations to offset overhead costs. Attempts to circumvent this system will result in the campaign being terminated, and the Coordinator’s approval revoked.

d. Marine Forces Reserve is “resource constrained” throughout the year, but especially during the holiday season. Even with the support of tens of thousands of volunteers, it is not feasible to collect and distribute additional items such as clothing and food. Other agencies exist to provide these services.

6.10 **Homemade Toys**

a. Of growing concern is the donation of homemade toys, and whether Toys for Tots will accept such toys, even though they may not have undergone required testing procedures. The Foundation is taking the position that since homemade toymakers are not producing toys for the purposes of making a profit and have no reason to cut corners to increase profit margins or reduce their inventory, and that the toys are generally safe with minimal moving parts that could cause injury, we will continue to accept homemade toys. In doing so, there are three layers of safety that must be in place to ensure this policy continues.

1) Layer One: Toy makers must understand the requirement that homemade toys be safe (no small parts; rounded edges; lead-free paint; etc.);

2) Layer Two: Toys for Tots Coordinators (and their volunteer assistants) must take steps to ensure the makers are informed of the Layer One requirement, carefully inspect homemade toys when they are donated, AND make every effort to distribute such toys appropriately; and

3) Layer Three: Parents must ensure that any toy provided is safe and age appropriate.

6.11 **Toys Resembling Weapons**

a. In the interest of safety for all concerned, toys that look like *realistic weapons* will not be distributed. Should a donation have only an orange tip to distinguish it from a real weapon, that donation shall also not be included in the local distribution, i.e., an Airsoft rifle. There are toys

that could be categorized as toy guns yet are not realistic looking. Such items are generally Nerf-type “Blasters” or water pistols/rifles and may be distributed.

b. In some communities where hunting and fishing is very popular, knives may be donated and/or purchased by the Coordinator. Hunting knives, like Buck knives, are authorized to be distributed if they are provided directly to a parent or guardian. **Knives must never be distributed directly to a child.**

6.12 **Local Toy Drop Off Locations**

Since toy drop off sites change from year to year, each Coordinator must post drop/collection sites on their local website. Be sure to update changes, as needed. Collection/drop site information posted on the local website will provide valuable information to local donors and sponsors and may contribute to a lesser number of phone calls during the campaign.

6.13 **Toy Valuation**

To provide a complete picture of the impact of the annual Toys for Tots campaign, the value of local toy donations is included in the Foundation’s Financial Statement. To determine the average value of locally donated toys, the Foundation engages the services of a statistician to gather information and then mathematically determine the average value of a locally donated toy. Local Coordinators must fully cooperate in this endeavor, as it has a tremendous impact on the program and the Foundation’s Financial Statement. Details regarding the process by which this valuation will be completed may be found in [Appendix P](#).

6.14 **Toy Distribution**

a. Eligibility criteria for a family to receive toys for their child(ren) is determined at the local campaign level. By working with local social service agencies and utilizing their capabilities and expertise, a local determination of need may be established. A highly effective way to help a Coordinator in this endeavor is for local applicants to register with local social service and support agencies to develop a list of families requesting support in the community. Occupations, religious affiliations, or racial backgrounds are not how Toys for Tots recipients are identified. Financial need is the basis for which assistance is provided. Military members may fall into this category and may be assisted. To lessen the appearance of favoritism, it is required that any military member receiving gifts be registered and accept gifts in the identical manner as other recipients.

b. Although, eligibility to receive toys is determined at the local campaign level, **campaign Coordinators are not authorized to request documents proving citizenship (a passport) or store any personal identifiable information (PII)**. The National Institute of Standards and Technology (NIST) Special Publication 800-122[5] defines PII as "any information about an individual maintained by an agency, including (1) any information that can be used to distinguish or trace an individual's identity, such as name, social security number, date and place of birth, mother's maiden name, or biometric records; and (2) any other information that is linked or

linkable to an individual, such as medical, educational, financial, and employment information."
WE OF COURSE ASK FAMILIES TO PROVIDE SOME PII TO PROPERLY IDENTIFY THE PARENT/GUARDIAN AND THE CHILD(S) RELATIONSHIP TO THE PARENT/GUARDIAN, BUT WE WILL NOT KEEP AND/OR STORE IT!

c. The use of local social service agencies and other legitimate organizations to identify children in need and help Coordinators distribute toys in the local community is encouraged. This will reduce the possibility of one family receiving support from multiple charities and/or organizations to the detriment of other families not receiving toys. For the benefit of the Toys for Tots Program, Marines should, to the extent feasible, distribute some toys directly to children in need (e.g., hospitals, orphanages, special children's events, etc.).

d. Working with local social service agencies can simplify the distribution process in local campaigns. Such agencies should register/work with the local Coordinator to ensure support is provided equally to all agencies and to reduce the possibility of duplication of effort and support to families. When distributing to social service agencies and other legitimate organizations, campaign Coordinators should maintain records of each organization to which toys are given, the number of toys issued, and the approximate number of children to receive toys. The easiest way to do this is have the organizations register through your campaign's local website. Knowing exactly which agencies are participating and how they intend to distribute the toys will greatly assist in the AAR process.

e. Conduct a limited screening of organizations applying to receive toys to ensure they are legitimate organizations that are recognized and considered credible in the community. One suggestion for determining the legitimacy of an organization is to ask for the Federal Identification Number or a copy of their IRS 501(c)(3) letter of determination (will have Fed ID # on it – see Foundation letter at [Appendix E](#)). There are other tax-exempt charitable organizations that a campaign may have the opportunity to work with. Additional information can be found on the IRS website here: <https://www.irs.gov/charities-non-profits/other-tax-exempt-organizations>.

f. Once toys are provided to a local social service or support agency, it is recommended that the local Toys for Tots campaign NOT be involved in the distribution of toys. There are past examples where the local social service agency did not correctly identify the demand for assistance, and they were unable to fulfill the requests from their families. News media then attempted to tarnish the Marine Corps Reserve Toys for Tots Program instead of laying blame on the local social service agency.

6.15 **Toy Transfers**

The transfer of toys from one Toys for Tots campaign Coordinator to another is NOT considered a distribution of toys. Toys may be counted as distributed in the community ONLY when passed directly to families or to an organization approved by the campaign. Both the transferring campaign and the receiving campaign must note the transfer on their AAR. **THE MOST EFFICIENT WAY FOR COORDINATORS TO HANDLE UNIT-TO-UNIT TRANSFERS**

IS TO HAVE (1) OPEN COMMUNICATION BETWEEN COORDINATORS TO ENSURE THAT THE TOY/BOOK/STOCKING STUFFER COUNT IS AGREED UPON AND (2) FOR THE RECEIVING COORDINATOR TO IMMEDIATELY INPUT THE INFORMATION INTO HIS/HER WEEKLY REPORT (found on the Secure Section here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/weekly-status-report/>).

6.16 **Toy Accountability & Carryover Inventory**

a. Toys/gifts will be categorized in three subsets: toys/gifts, books, and stocking stuffers. When recording the total in each category, accuracy is the principal goal. While the volume of donations may preclude counting every item, “estimates” of the number of donations must be calculated. Record each category as 1 item = 1 item in each subset. The Foundation has created the necessary calculations to adjust numbers within the AAR system for books and stocking stuffers. **DO NOT CALCULATE THESE ADJUSTMENTS ON YOUR OWN. AGAIN, 1 TOY, OR 1 BOOK OR 1 STOCKING STUFFER EQUALS 1 TOY, 1 BOOK, OR 1 STOCKING STUFFER ON THE AAR!!!**

b. **OF NOTE, BATTERIES ARE ACCESSORIES AND ARE NOT COUNTED AS TOYS.**

c. Every year, late individual and/or corporate donations create an inventory in many locations. In many instances, this inventory creates a bank of toys enabling the local campaign to be better prepared for the following year. **In all cases, any remaining inventory must be carefully accounted for and properly stored to ensure availability for the coming year.**

1) To assist Coordinators to accurately report local carryover inventory, modifications to the AAR have been developed. Verification of the previous year’s inventory is essential before reporting the specifics of the local campaign. Toy counts will be automatically tabulated and verified as entries are made. Separate entry points for toys, books, and stocking stuffers will further enhance our ability to accurately record donation numbers. Entries for toys collected, purchased, and received from the Foundation will be followed by the current year toys/gifts distributed numbers. These entries, when combined/tabulated, will result in the number of carryover items to the next campaign. It is imperative that the carryover inventory is verified before and after entry. Instructions and documentation are provided throughout the AAR form to assist in accurately reporting any inventory. Should numbers not balance, a suggestion would be to first visit the local storage area to confirm the results reported in the AAR. Should the numbers not match, it will be necessary to revisit the AAR to make appropriate adjustments. Changes in the areas of toys/gifts collected and/or toys/gifts distributed will then bring the report in line with results from the inventory.

2) When a campaign has carryover inventory from the previous year, that carryover inventory count is verified with the Coordinator’s submission of the AAR. In many instances, the carryover inventory is damaged during the time between campaigns, i.e., January to October. For example, toys break due to how they were packed, rodents get into the storage facility, the

warehouse or storage facility isn't climate controlled, and the toys become unusable, etc. Annually in September, the Foundation requires Coordinators to recount their carryover inventory so that each campaign has the correct starting number with respect to its carryover inventory. The carryover inventory number can only be less than or equal to the carryover inventory count that was reported on the campaign's AAR.

d. Should any local inventory equal 35% or more of the total toys/gifts distributed during a campaign, the Foundation will initially exclude such site from receiving supplemental toys. While an inventory represents preparedness for future campaigns, the Foundation does not wish to exacerbate the challenges facing a local Coordinator. If extraordinary circumstances exist, contact the Foundation to discuss. Many sites will be visited by the Foundation staff, independent contractors, and auditors to verify any remaining inventory. When sites are selected for visits, the Foundation will contact the local Coordinator and provide advance information/guidance about the upcoming event.

e. Inaccuracies in reporting can, and do, have a cumulative effect on the overall Program. In no other area do we become more acutely aware of this than with carryover inventory. **YOUR BEST EFFORT MUST BE MADE TO ACCURATELY REPORT OUR INVENTORY.** Listed below are some suggestions:

1) Conduct a physical inspection/count of all remaining toys/gifts. Estimate the number of items that are on, or in, each pallet, box, bag, or other container, then determine the total number of containers and complete the mathematical calculation.

2) Once calculated, compare to the AAR, and if not accurate, adjust the report in areas that are typically estimated, i.e., toys/gifts collected, or toys/gifts distributed.

3) Inaccurate inventories discovered between campaigns (16 Jan - Sep) must be brought to the attention of the Foundation. This is done through the annual Carryover Inventory Adjustment that each local Coordinator does in September. The Foundation distributes a detailed Memo describing this process.

f. Inaccurate inventory totals have an immediate and negative impact on the Foundation. Such inaccuracies will be detected during the annual audit, and if determined to be a "material error," the Foundation could receive a negative audit report, i.e., Modified Opinion. The goal of every organization is to receive an Unmodified Opinion at the end of its annual audit. The Foundation may also receive a Management Letter identifying an accounting weakness in the program. Attention to detail will ensure this does not occur.

g. Since 2012, the Foundation engaged the services of an inventory accounting firm to visit any site that has **2,500 or more toys, books, and/or stocking stuffers reported on the current AAR or that has established a pattern of carrying over 2,500 toys, books, or stocking stuffers from the previous year's AAR.** This visit will serve to verify or correct the number of toys reported as carryover inventory before the audit process begins.

6.17 Toys for Tots Name and Logo

a. The Marine Toys for Tots Foundation has registered the Toys for Tots name and logo with the U.S. Patent and Trademark Office of the U.S. Department of Commerce (**Name - Register number 1,946,913; Logo - Register number 1,929,756**). The continuous and exclusive use of the Toys for Tots name and logo by the U.S. Marine Corps Reserve Toys for Tots Program is from October 1948 through the present.

b. CMFR appoints local Marine Reserve Unit Toys for Tots Coordinators. President & CEO, Marine Toys for Tots Foundation appoints local Toys for Tots Coordinators for campaigns conducted by LCOs. Such duly appointed local Toys for Tots Coordinators may authorize local businesses to use the Toys for Tots name and logo in connection with annual local U.S. Marine Corps Reserve Toys for Tots campaigns, subject to the following:

1) The Toys for Tots name and logo are to be used principally for obtaining toy donations within the Coordinator's community.

2) Use of the Toys for Tots name and logo for projects or events can be authorized only for the duration of one year's campaign.

3) The Toys for Tots name and logo cannot be used by a local Toys for Tots Coordinator, a local business, organization, or individual to conduct direct mail or telemarketing, or email fundraising campaigns.

4) Toys for Tots Coordinators are not authorized to allow the use of the Toys for Tots name and logo outside the local community/area of responsibility.

c. MFR and the Marine Toys for Tots Foundation are authorized to use the Toys for Tots name and logo on their respective websites. Additionally, every Toys for Tots campaign will have a website to advertise the U.S. Marine Corps Reserve Toys for Tots Program, as well as events and activities taking place in the local community. Local sites will also recognize local sponsors and donors and post collection/drop sites for the surrounding area. Donors visiting these sites can ALSO donate online. By connecting more than 860 local websites to the Foundation website, online donations will be traceable to their origin and deposited into the proper local campaign account.

d. Use of the Toys for Tots name and logo for Regional and National undertakings may only be authorized by the Marine Toys for Tots Foundation.

e. The Marine Toys for Tots Foundation is the only private, officially incorporated organization authorized to use the Toys for Tots name as part of their organizational title and the Toys for Tots logo as their organizational logo. No other officially incorporated or chartered organization is authorized or can be authorized to use the Toys for Tots name and logo as a part of the name of their organization.

f. LCOs, authorized by the local Marine Reserve Unit to assist with the local campaign, or authorized by the Marine Toys for Tots Foundation to conduct a local Toys for Tots campaign in a community without a Marine Reserve Unit as part of the U.S. Marine Corps Reserve Toys for Tots Program, may use the Toys for Tots name and logo during the period they are authorized to be a part of the Toys for Tots program. This authorization may be granted by either the local Reserve Unit or the Marine Toys for Tots Foundation.

g. Reserve Units and LCOs authorized to conduct Toys for Tots campaigns must be protective of the Toys for Tots name and logo. Reserve Units and LCOs must insist on reviewing and approving all business, media and individual requests to use the name and/or logo. Additionally, should anyone request to use the name or logo in areas beyond an individual unit's area of responsibility, that request must be forwarded to the Foundation, Attn: Vice President Marketing & Development.

h. Guidance for addressing the improper or illegal use of the Toys for Tots Name or Logo is contained in [Appendix G](#).

6.18 **Criminal Activity Alert**

In recent years, criminals/disreputable persons/organizations have gone door-to-door soliciting donations, conducted telemarketing schemes, conducted campaigns using the Toys for Tots logo without permission, and visited toy drop off locations and collected toys claiming to be civilian representatives of the U.S. Marine Corps Reserve Toys for Tots Program. To avoid problems such as this, the local Toys for Tots Coordinator should develop an identification card, letter, badge, a 'T' shirt, or other way(s) to ensure that Toys for Tots personnel are easily identified (see [https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/miscellaneous/-Name Tag Examples](https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/miscellaneous/-Name%20Tag%20Examples)). Notify drop off locations of the identity of those who will collect toys. In all other cases, notify local authorities and the Foundation to begin inquiries to halt these activities and hold the individual/organization accountable for their actions.

6.19 **Current Contact Information**

The names of Toys for Tots Coordinators, unit telephone numbers, email addresses and mailing addresses change frequently. It is essential that Marine Toys for Tots Foundation is notified immediately should any changes in names, mailing addresses, phone numbers, and email addresses occur. **It is imperative that the Foundation has both an email address and a phone number (preferably a mobile number) so that we can immediately contact a Coordinator. If this is a personal email address or mobile phone number, WE WILL NOT RELEASE IT TO THE PUBLIC.**

6.20 **Corresponding with the Foundation**

a. All correspondence to the Foundation, except monetary donations and funds from a fundraising event, **should be sent to the appropriate Regional Campaign Manager via email.** If a Coordinator must send correspondence to the Foundation via "snail mail," the appropriate

address is: Marine Toys for Tots Foundation, Attn: [whoever you want the correspondence to go to], 18251 Quantico Gateway Drive, Triangle, VA 22172.

b. The Regional Campaign Manager will work on your request or issue and respond in a timely manner. Email is preferred vice phone calls as each Regional Campaign Manager has about 120 local campaigns in their Regions.

c. Forward all monetary donations, i.e., checks and money orders to the Marine Toys for Tots Foundation’s caging company using the overnight mail envelopes and billable stamps. These envelopes and billable stamps are provided to Coordinators at the beginning of the campaign. **DO NOT FORWARD ANY OTHER CORRESPONDENCE TO THE CAGING COMPANY IN BOONE IA AS IT WILL SIGNIFICANTLY DELAY ANY ACTION REQUESTED.**

d. When corresponding with the Foundation, Coordinators should provide the city and state in which the organization is located and their six-letter Accounting Code in the email subject line (e.g., Anchorage, AK; AKANCH). This will assist the Foundation staff in processing such correspondence.

e. Addresses to use when corresponding with the Foundation:

<u>Monetary Donations: Checks & Money Orders Only – NO CASH!!!</u> Via Overnight Billable Stamp	<u>ALL Other Correspondence (email FIRST)</u> Via Pre-Addressed, Pre-Paid envelope
Toys for Tots Desk CDS Global 2005 Lakewood Dr Boone, IA 50036	MTFTF Attn: (Regional Campaign Manager, Region ___) 18251 Quantico Gateway Drive Triangle, VA 22172
Do not give out the Boone address to anyone!	

6.21 Insurance

a. Marine Toys for Tots Foundation Commercial General Liability Coverage

1) The Foundation has insurance to protect the Foundation headquarters, its officers, employees and board members, its furniture, and office equipment.

2) The Marine Toys for Tots Foundation has liability insurance which protects Marine Toys for Tots from claims submitted by volunteers, those who assist with the distribution of toys, parents of children injured by a distributed toy, and other participants in the Marine Toys for Tots Program. The Foundation can provide a certificate of insurance (COI) should one be required for an event or donated services. The insurance request form can be found on the Secure Section here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/forms/required-insurance.aspx>. An example of a blank COI can be seen in [Appendix T](#).

3) From the perspective of a Coordinator, you will most likely be asked by the owner of a storage facility/warehouse for a COI that provides liability insurance ensuring that the Foundation is protected against damage to the facility, i.e., forklift backs into a wall, windows broken, etc. Remember that the toys in the facility are not covered by the general liability policy. Clarification that yes, the policy covers these instances and maybe a few more examples.

4) For additional protection to the Foundation, Coordinators and volunteers MUST sign a Hold Harmless Agreement (see [Appendix C](#)).

5) Insurance for fundraising events is much more restrictive. REMEMBER THAT THE MARINE TOYS FOR TOTS FOUNDATION IS LIABLE FOR ANY MISHAP THAT OCCURS AT AN EVENT WHERE THE CAMPAIGN, I.E., THE FOUNDATION, IS THE SPONSOR. The Foundation mandates Coordinators find a company/organization/agency to act as the sponsor where Toys for Tots is the beneficiary of toys and monetary donations. This will decrease the Foundation's liability risk exponentially. If a Coordinator desires to have an event where the local campaign, i.e., the Marine Toys for Tots Foundation, is the sponsor, submit an Event Approval Form which is located here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/forms/event-approval.aspx>.

6) Fundraising events, i.e., "Special Events" are not covered by the Foundation's Commercial General Liability Coverage. Specifically, the policy states, "This insurance will not apply to "bodily injury", "property damage" and "personal and advertising injury" caused in whole or in part by the acts or omissions of you or someone acting on your behalf arising out of a "special event".

7) "Special event" means a sporting, cultural, business or other type of unique activity, in a certain place occurring during a limited or fixed interval of time (one-time, annual) and presented to a live audience brought together to watch or to participate. "Special events" include, but are not limited to, street fairs, music festivals, revenue generating or public relations activities, regardless of the location or relationship to the operations of any insured. This insurance does not apply to claims arising from:

- (a) Any overnight trips;
- (b) Any events with more than 500 attendees at any one time;
- (c) Carnivals and fairs that include mechanical rides;
- (d) Parades;
- (e) Water sports or water-related events;
- (f) Any events involving aircraft or power watercraft;

- (g) Trampolines or bounce houses;
- (h) Fireworks;
- (i) Firearms, including firearm displays;
- (j) Automobile rallies and motorcycle rides or poker runs;
- (k) Political rallies or protests;
- (l) Any circus, zoo or other event featuring human interaction with live animals;
- (m) Fairs, carnivals, rodeos or festivals;
- (n) Rodeos or equestrian activities;
- (o) Street fair or street art exhibition;
- (p) Any events with outdoor concerts;
- (q) Organized contact sports including, but not limited to, football, soccer, hockey, and rugby;
- (r) Winery, distillery, brewery, or bar tours;
- (s) Armed Security Personnel; and
- (t) Haunted Houses or Haunted Trails;

8) FINALLY, ALCOHOL WILL NOT BE SERVED AS PART OF A MARINE TOYS FOR TOTS PROGRAM SPONSORED FUNDRAISING EVENT. The policy clearly states, “This insurance does not apply to any “injury” for which liability is imposed on the insured by reason of the selling, serving or furnishing of any alcoholic beverage at or in connection with a “special event” sponsored, funded, organized, promoted, endorsed, or supported in whole or in part by any insured.

9) THE FOUNDATION MAY BE ABLE TO PURCHASE ADDITIONAL COVERAGE, I.E., A RIDER, FOR A CAMPAIGN SPONSORED EVENT. THE COST OF THE RIDER WILL BE BORNE BY THE LOCAL CAMPAIGN. COMPLETE THE INSURANCE REQUEST ON THE SECURE SECTION (<https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/forms/required-insurance.aspx>) AND WORK WITH THE DEPUTY VICE PRESIDENT OF OPERATIONS IN OBTAINING THE ADDITIONAL COVERAGE.

10) If an incident or accident occurs that results in damage to property covered by the Foundation's General Liability insurance, first notify your Regional Campaign Manager and the Deputy Vice President, Operations as soon as possible. Please provide as much information as possible to include a detailed description of what happened and any pictures that you took. After INITIAL notification of the incident/accident to the Foundation, you will need to initiate a claim. As the Foundation is negotiating a new insurance carrier at the time of publishing, you will need to contact the Deputy Vice President of Operations to get the claims phone number / email address. **PLEASE REMEMBER, YOU HAVE ALL THE SPECIFIC INFORMATION AND DETAILS WHICH IS WHY THE PROCESS BEGINS AND ENDS AT THE LOCAL COORDINATOR LEVEL.**

b. Marine Corps Reserve Units:

1) Since Toys for Tots is an official mission of the U.S. Marine Corps Reserve, Marines in a duty status are protected whenever acting in support of the Toys for Tots Program. Such protection includes all military equipment and facilities used in support of Toys for Tots.

2) Civilian volunteers are not protected by the U.S. Government. Marine Units must have all civilians sign a Gratuitous Service Agreement & Hold Harmless Agreement to ensure awareness that they are not covered should there be an accident (see [Appendix B](#)). **All such agreements should be retained locally for at least two years.** Safety can be reviewed in [Section XV](#) of this manual.

3) Civilian equipment and facilities used in support of Toys for Tots are not protected by the U.S. Government. Coordinators are encouraged to establish insurance coverage when receiving a donated vehicle, storage space or any other donated item in support of Toys for Tots (see insurance request form on the Secure Section here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/forms/required-insurance.aspx>.) Insurance to protect Toys for Tots from damage or liability is mandatory.

4) Reserve Units faced with a need for insurance coverage should contact their Regional Campaign Manager before purchasing a policy. If needed, payment of the policy premium shall be made with the Toys for Tots Purchase Card.

5) In the event it becomes necessary to rent a vehicle to support the local campaign, **FULL COVERAGE INSURANCE for the vehicle is mandatory.** In addition to purchasing insurance for the vehicle, a list of drivers **MUST** be provided at the time the vehicle is rented. Not providing this list of drivers will void the insurance should an accident occur while someone other than the renter was driving. Should an accident occur, payment, **less any deductible**, will then be covered by the insurance policy and not the Marine Corps unit or the local Toys for Tots campaign. **Should an accident be the result of reckless or irresponsible driving, payment for repairs will be the responsibility of the driver's personal insurance policy.** No money will be obligated from any Toys for Tots account in the event a driver is ticketed as responsible for improper operation of the vehicle. Contact your respective

Regional Campaign Manager for assistance. Payment of the policy premium should be made with the Toys for Tots Purchase Card.

6) Should a site be the recipient of a donated vehicle to aid in collection efforts for the campaign, there most likely will still be a requirement to secure insurance for the vehicle. It is not possible to purchase insurance for a donated vehicle; therefore, **only two options are available:**

a) **The owner of the vehicle continues to provide insurance for the vehicle (may require a driver list or a limited number of drivers).**

b) **Limit the number of drivers authorized to operate the vehicle to only one person. The insurance coverage will then extend from his/her personal policy.**

c. LCO's:

1) Civilian volunteers are not protected by the U. S. Government. All volunteers must sign a Hold Harmless Agreement to ensure awareness that they are not covered should there be an accident (see [Appendix C](#)). **All such agreements should be retained locally for at least two years.** Safety can be reviewed in [Section XV](#) of this manual.

2) Civilian equipment and facilities used in support of Toys for Tots are not protected by the U.S. Government. LCO Coordinators are encouraged to establish responsibility for insurance coverage when receiving a donated vehicle, storage space or any other donated item in support of Toys for Tots. Insurance to protect Toys for Tots from damage or liability is mandatory.

3) LCO's faced with a need for insurance coverage should contact their Regional Campaign Manager before purchasing a policy. If needed, payment of the policy premium shall be made with the Toys for Tots purchase card.

4) In the event it becomes necessary to rent a vehicle to support the local campaign, **FULL COVERAGE INSURANCE for the vehicle is mandatory.** **In addition to purchasing insurance for the vehicle, a list of drivers MUST be provided at the time the vehicle is rented. Not providing this list of drivers will void the insurance should an accident occur while someone other than the renter was driving.** Should an accident occur, payment, *less any deductible*, will then be covered by the insurance policy and not the local Toys for Tots account. **Should an accident be the result of reckless or irresponsible driving, payment for repairs will be the responsibility of the driver's insurance policy.** **No money will be obligated from any Toys for Tots account in the event a driver is ticketed as responsible for improper operation of the vehicle.** Contact your respective Regional Campaign Manager for assistance. Payment of the policy premium should be made with the Toys for Tots Purchase Card.

5) Should a site be the recipient of a donated vehicle to aid in collection efforts for the campaign, there most likely will still be a requirement to secure insurance for the vehicle. It is

not possible to purchase insurance for a donated vehicle; therefore, **only two options are available:**

a) **The owner of the vehicle continues to provide insurance for the vehicle (may require a driver list or a limited number of drivers).**

b) **Limit the number of drivers authorized to operate the vehicle to only one person. The insurance coverage will then need to extend from his/her personal policy.**

6.22 **Toy Collection / Distribution Other Than Christmas**

a. Units are not encouraged to conduct toy collection campaigns outside the recognized window of October through December. Events supporting Toys for Tots are permitted but should focus on informing the community of the upcoming campaign.

b. Units are encouraged to distribute toys from their carryover inventory in special circumstances. In the case of a local disaster or a high visibility incident, TFT units **are approved to distribute toys**. Examples of situations where it is appropriate for a Coordinator to distribute toys is after a hurricane or other natural disaster, if a family's home was destroyed by fire, etc.

c. If a local campaign desires to have an event to assist children in need outside of the Christmas holiday season, the Coordinator must submit the event request via the Secure Site to their Regional Campaign Manager. If the event cannot be locally supported, the Foundation will take each request on a case-by-case basis.

6.23 **National Involvement**

Refer all questions and requests from local individuals or corporations pertaining to national support or sponsorship to the Vice President, Marketing and Development at the Foundation.

6.24 **Reimbursement Policy**

a. Each year, Marines and volunteers erroneously spend personal funds to ensure the local Toys for Tots campaign operates unimpeded. This is not the authorized method of conducting Toys for Tots business, and personal reimbursements can prove difficult.

b. With planning, local Coordinators can virtually eliminate the need for the expenditure of personal funds. Several suggestions are described in the Toys for Tots Standard Operating Procedures manual that accomplish this goal; however, there may be times when a volunteer makes a purchase intended for the local campaign without first inquiring about the correct procedure(s) to follow. In such an instance, contact your Regional Campaign Manager immediately, and the following reimbursement policy is in effect:

1) All itemized legible receipts for purchases made with personal funds must be retained.

2) **Reimbursements will be made ONLY after the completion of the annual campaign** to reduce administrative time spent on this project.

3) **Please note, if a Regional Campaign Manager notifies a Coordinator that their purchase card has been turned off and the Coordinator makes a conscious decision to use their personal credit card, the Foundation WILL NOT reimburse the Coordinator. Exceptions to this policy will ONLY be granted at the Vice President, Operations level.**

c. Reimbursement request(s) received at the Foundation **after** 1 March following the current campaign will not be honored (e.g., 1 March 2025 for the 2024 Toys for Tots campaign).

6.25 **Campaigns of the Year**

a. Upon the conclusion of the annual campaign, a special committee reviews the performance of all Coordinators to determine the Reserve Unit and LCO Coordinators & Campaigns of the Year both Nationally and for each Toys for Tots region. The criteria used to determine the Coordinators and campaigns of the year include the following:

- 1) Scope of the campaign
- 2) Adherence to administrative procedures
- 3) Spirit of teamwork demonstrated
- 4) Attention to detail
- 5) Planning
- 6) Effectiveness of execution of the local plan
- 7) Responsiveness
- 8) Timeliness
- 9) Communication w/local businesses, volunteers, and recipients AND Marine Toys for Tots Foundation
- 10) Results of Internal Review

b. The Toys for Tots Coordinators for the Regional and National campaigns of the year conducted by a Reserve Unit and by a Local Community Organization are recognized for their outstanding performance by the presentation of the following awards:

- 1) Display plaque for the organization

- 2) Marine Toys for Tots Foundation Founder's Medallion
- 3) Navy and Marine Corps Commendation/Achievement Medals and Department of the Navy Meritorious Public Service Award (National/Regional honorees)
- 4) Campaign of the Year Volunteer Shirts (13 per regional site)
- 5) Campaign of the Year Volunteer Hats (13 per regional site)
- 6) Commendation Letter

SECTION VII --- FUND HANDLING PROCEDURES

7.1 General

a. The Marine Toys for Tots Foundation is the sole authorized fundraising and support organization for the U.S. Marine Corps Reserve Toys for Tots Program.

b. Local Coordinators are authorized to accept unsolicited donations on behalf of the Marine Toys for Tots Foundation. The Foundation, an IRS recognized 501(c)(3) not for profit public charity, is responsible for managing all funds donated and raised using the Toys for Tots name and logo. Donations and funds raised, which are received by the Foundation, are deductible on federal income tax returns. Contributions and funds raised, which are not received by the Foundation, are not tax deductible. The Marine Toys for Tots Foundation is the only organization authorized by the states to receive donations and raise funds using the Toys for Tots name and logo. Therefore, any organization which accepts donations or raises funds using the Toys for Tots name and logo and does not forward the donations and funds to the Foundation, is in violation of state laws.

c. Donations and funds raised become IRS recognized charitable contributions (tax deductible) only upon receipt by the Marine Toys for Tots Foundation.

d. The Foundation is the only authorized Toys for Tots agent registered by each state attorney general to receive and manage donations and funds raised using the Toys for Tots name and logo.

e. To summarize, all funds raised and donations received based on use of the Toys for Tots name and logo are forwarded to the Foundation to enable donors to declare the donations as tax deductions on federal income tax returns. Forwarding donations to the Foundation also protects the local Coordinator, the donors, the integrity of the Toys for Tots program, the Marine Corps and the Foundation. Concurrently, forwarding all donations and funds to the Foundation is necessary to ensure that the Toys for Tots Program is operated in accordance with the Marine Corps Order, Marine Forces Reserve Force Order, the Foundation SOP, the Internal Revenue Service Tax Code, state laws and charitable standards.

f. In recent years, more of our donors have expressed interest in making donations In Honor or In Memory of an individual or group. Listed below are ways in which such donations can be processed:

1) Direct the donor to the local website and instruct them to choose the “Ways to Donate” tab from the home page. From there, locate and select the “Donate In Honor or In Memory” tab and follow the prompts and directions for making a credit card donation In Honor or In Memory. A greeting card will be sent to the recipient identified informing them of the donation.

2) If the donor would prefer to mail in a check for their In Honor or In Memory donation, they should make their checks payable to “Toys for Tots” and download, print, and complete the

form found at the following link: <https://www.toysfortots.org/donate/donation-docs/mail-in-donation-form.pdf>

Checks and completed forms can be mailed to:

Marine Toys for Tots Foundation
Attn: In Honor/In Memory Administration
18251 Quantico Gateway Drive
Triangle, VA 22172

3) In the absence of a completed form, please include the name of the individual or group to be honored or remembered, the name of the individual or group to be notified of the gift (this is typically a family member or Next-of-Kin), the address of the person to be notified, and the name of the individual or group who is making the donation (how the Foundation should refer to the donor in the acknowledgement card). Notification can only be sent if the above information is provided.

g. If an individual desires to donate stock, mutual funds, assets, etc., direct them to the “Ways to Donate” page of the Foundation’s website: <https://www.toysfortots.org/donate/Default.aspx>. For additional information, please have the individual contact the Vice President, Marketing & Development.

7.2 **Fundraising**

a. A Marine in uniform or acting in an active-duty status, while not in uniform should not solicit cash donations or personally conduct a fundraising project.

b. LCO’s, which assist local Reserve Unit Toys for Tots Campaigns may conduct local fundraising projects upon approval of the Reserve Unit Toys for Tots Coordinator and subject to the conditions set forth in sub-paragraphs 7.2.d. through 7.2.h.

c. LCOs authorized to conduct local community campaigns, in communities without a Marine Reserve Unit, may conduct local fundraising projects subject to the conditions set forth in sub-paragraphs 7.2.d. through 7.2.h.

d. Fundraising Events such as golf tournaments, foot races, bicycle races and similar purely voluntary participation and non-invasive events, i.e., Special Events must be approved by the Regional Campaign Manager. Request approval through the Secure Section by completing the Event Approval Form (<https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/forms/event-approval.aspx>). Events must have a detailed plan and scope of the project submitted for review by the Foundation before obligating any financial support to the event. Of principal consideration when reviewing such plans is the return of investment of donors’ gifts to Toys for Tots. Should an event appear to be unable to increase the available funds for the local campaign, the event will not be approved. All donations received, and funds raised from such events must be forwarded to the Foundation. Fundraising events may be

supervised by active-duty Marines, but solicitations must be conducted by the civilian volunteer support network. See [Section 6.21.a.7](#)) concerning Special Event additional insurance requirements.

e. Fundraising projects that invade the privacy of members of the local community are not authorized. Examples include door-to-door solicitations, telemarketing, direct mailing of fundraising letters, and similar invasive projects. Such activities irritate people, can cause embarrassment to the Marine Corps, and adversely affect the Marine Corps' public image. ***Do not engage in e-mail, direct mail, or telemarketing for fundraising. Local units are not registered as fundraisers in their states, and therefore not authorized by law to do so. The Foundation works directly with agencies who are registered in every state and legally permitted to fundraise on Toys for Tots' behalf. The funds raised by the Foundation are used to purchase toys and books to supplement local campaigns.***

f. Raffles are events often requiring registration with a State Gaming Commission. In the event such a registration is required, Toys for Tots will not authorize the conduct of a raffle. Should another local organization wish to conduct a raffle, Toys for Tots will not underwrite or sign a contract for the conduct of such an event. The sponsoring organization is responsible for all aspects of the raffle. Conducting gambling (raffles) events can affect a charity's standing with the Internal Revenue Service. Contact the respective Regional Campaign Manager before committing to such a fundraising event. In the event a raffle is authorized and conducted, personal information about the prizewinners must be forwarded to the Foundation as well as a description of the prize won.

g. Toys for Tots Coordinators are not authorized to contract or work with professional fundraising organizations in which the fund raiser receives a portion or percentage of funds raised. This includes third party fundraising organizations and websites such as GoFundMe.

h. Funds raised using the Toys for Tots name and/or logo must be expended for Toys for Tots mission-related items or services. Toys for Tots funds cannot be used to pay expenses related to missions assigned to the U.S. Marine Corps other than Toys for Tots, or for personal items or services, or for any non-TFT items or projects. Use of Toys for Tots funds for any non-TFT purchase constitutes a misappropriation of funds and can be punished under the Uniform Code of Military Justice, or by local civil courts. Should a coordinator desire to make a unique purchase, he/she will need to fill out the Purchase Approval Form and await the Foundation for approval. Before funds may be spent on any unique purchase, an email explaining the purpose of the purchase must be submitted to the Foundation (appropriate Regional Campaign Manager) and a return email must be received from the Foundation authorizing such purchase.

7.3 **Handling of Unsolicited Monetary Donations and Funds Raised**

a. In recent years, there have been instances where Coordinators failed to live up to their responsibility of properly caring for monetary donations to Toys for Tots. As a result, the fund handling procedures outlined below have been significantly modified to add an additional layer of oversight/control to the handling of cash donations.

1) Fund handling procedures for TFT Coordinators:

a) The two-person rule remains in effect. All monetary donations must be counted by the Coordinator and a second person to ensure accuracy of the count, as well as provide one additional layer of oversight for donations from the local community. The second person verifying the amount cannot be a spouse or significant other in a personal relationship.

b) Ensure that entries are appropriately entered on the deposit slip by verifying that dates on checks are not either post-dated or over 6-months old, that the checks are made payable to TOYS FOR TOTS, that the dollar value matches between the numeric number and the written number, and that the check is appropriately signed by the account holder.

c) Using the stamp provided by MFTTF, stamp the unit account code and city/state **on the memo line on the front of each check (do not stamp near bank encoded info area (MICR))**. If the stamp has been lost or misplaced, contact the appropriate Regional Campaign Manager to ensure correct organization information is handwritten on the memo line of each check and to order a replacement stamp. The account code can be found in the TFT Coordinator Binder.

d) Cash donations may not be directly used for the purchase of toys or to purchase any other goods or services. All donations must process through the Foundation.

(1) The process for depositing cash donations is as follows:

(a) Go to a local U.S. Post Office/Wal-Mart/etc. to convert all cash to a money order made out to Marine Toys for Tots Foundation.

(b) Do NOT deposit cash into a local savings or checking account and then forward it to the Foundation.

(c) Include with other “check” donations and forward via overnight mail to the Foundation donation processing company in Boone, Iowa.

e) **Local Toys for Tots bank accounts are NOT authorized.** All funds are to be sent directly to the Foundation’s donation processing company in Boone, IA via overnight mail using the envelopes and billable stamps provided. As the stock of envelopes and billable stamps is depleted, contact the appropriate Regional Campaign Manager for a resupply.

f) Prepare the deposit slip in the Secure Section of the local website. **Signatures from both the Coordinator and a person certifying the deposit amount are required on this form before sending via overnight mail to Boone, IA.**

g) Once each week (more often, if necessary) forward checks and deposit slips to the Foundation-designated address in Boone, Iowa, using the overnight billable stamps provided. **Do**

not release this address to the public – it is intended for use only within the Toys for Tots program. Should local donors begin sending unidentified checks to this address, the deposit process will be delayed. If local donors desire to send their donation directly to the Foundation, provide the following address: Marine Toys for Tots Foundation, 18251 Quantico Gateway Drive, Triangle, VA 22172. This action will result in the donation being deposited into the Foundation account for use in support of the national effort. If a donor would like the donation to be allocated for a specific campaign, they must submit that information in writing along with the donation.

(1) Include only donation checks and money orders with the deposit slip to the Foundation-designated address in Boone, Iowa, using the overnight billable stamps provided (**do NOT send any other paperwork with donations**).

(2) Send all other correspondence and requests for assistance/action to the Foundation via email .

(3) Failure to send donations or correspondence to the correct address can result in significant delays in processing the correspondence and in updating unit accounts.

h) Keep funds in a locked safe or in a secure location until mailed.

1) Fund handling by the Foundation:

a) The Foundation earmarks all funds received from local Toys for Tots Coordinators specifically for the benefit of the locality of the forwarding Coordinator. Local Toys for Tots Coordinators can view an online Financial Report containing deposits, purchases, and, occasionally, transfers from/to the Foundation which is kept current by the Foundation staff and is available 24-hours a day, seven days a week. Visit the local website, log in using the assigned username and password (both are case sensitive) in the spaces provided. Once logged in click the link “Enter Secure Section” and then click the tab at the top of the page “FINANCIAL REPORT” to view local account transactions.

b) The Foundation sends a letter of acknowledgment to all donors for their tax records. The goal is to have all letters in the mail by 31 January each year. Calling earlier to request such a letter or to check on its progress will not expedite matters. See IRS Publication 1771 (<https://www.irs.gov/pub/irs-pdf/p1771.pdf>), page 3, paragraph titled, “Contemporaneous” for more details.

c) Refer to [Section V Section 5.12](#) – “All toy drops for local campaigns are considered unattended;” otherwise an extraordinary requirement to provide donors with receipts will be added to the list of Coordinator responsibilities.

d) The Foundation keeps local TFT Coordinators advised of the amount of funds available for use in their local campaign via their Online Financial Report. Bank statements are transmitted to the Foundation website each weekday. Units may access the Online Financial

Report through the Secure Section of the local website only if a username and password have been provided. Coordinators should refer to the Toys for Tots binder provided to determine the username and password assigned or contact the appropriate Regional Campaign Manager. Contact the Foundation if problems occur. The Foundation will provide a copy of the Financial Report upon request. This statement **does not include deposits in transit or invoices that have not been received by the Foundation.**

7.4 Mishandling of Toys for Tots Funds

a. Funds that are not forwarded directly to the Foundation but are used to purchase items or are deposited into a local account upon receipt from the donor are mishandled funds. Such funds have been misappropriated from the Foundation.

b. A local Coordinator who does not forward to the Foundation funds donated or raised using the Toys for Tots name and/or logo, but retains those funds locally and expends those funds, faces the following:

1) He/she has failed to comply with the Toys for Tots fund handling procedures as outlined in the Marine Corps Order, the Marine Forces Reserve Order, the Foundation SOP, and has violated the agreement signed certifying compliance; hence will be removed as a Toys for Tots Coordinator.

2) He/she must disclose the amount retained on his/her income tax return and pay taxes on the amount.

3) He/she must advise the donors that the funds are not tax deductible because they were not managed by an IRS recognized 501(c)(3) not for profit charity.

4) All Coordinators, Marine or civilian may be subject to disciplinary action and prosecution by either military or civil authorities.

7.5 Matching Gifts Processing Procedures

a. Many corporations will match monthly or payroll deduction gifts as well as annual gifts from their employees as a way of showing their support for their employees’ charitable causes. Employees obtain matching gift applications from their HR/personnel office, or they go to an online portal. They then fill out the form and submit it with their donation check.

1) Below are instructions on completing the matching forms:

Name of the Organization	Marine Toys for Tots Foundation (Note: This must match IRS records)
Address of the Organization	18251 Quantico Gateway Drive, Triangle, VA 22172 (Again, Foundation address must be used to match IRS records). Do not use Local Address or caging address.

Designation	Local Unit “City, State”. Please enter local unit name (six letter code (example: AKANCH)) to ensure the gift is transferred to the proper account upon receipt.
Telephone Number and Fax Number	703-640-9433; Fax: 703-649-2054 (This is the main number for the Foundation)
FEIN	20-3021444
Matching Gift Point of Contact	Melanie Turner (or Jennifer Laine)
Website	https://www.toysfortots.org/donate/matching-gift.aspx
Email Address	matchinggifts@toysfortots.org
Amount of Gift	Donor Donation Amount
Tax Deductible Gift Amount	Same as Amount of Gift less benefits received from gift
Date Gift Received	Date check received
Signature of Officer	Ted Silvester (Requires the signature of a Toys for Tots Officer, not a local Coordinator)
Title of Officer	VP, Marketing & Development

2) Forward the completed form in a preprinted envelope (provided), to the Foundation for processing. Matching gifts must be received at the Foundation for proper accountability and gift verification.

b. A local unit may receive a letter citing issues with processing the application. This occurs when the donor has used the local unit address to process a matching gift. To properly process a donation, the parent organization (holds the Group Exemption from the IRS) is asked to send a letter confirming a local chapter as covered under the Group Ruling 501(c)(3) status on company letterhead. **Donors must be instructed to use the Foundation address on the matching form – NOT a local campaign address.** Should a donor use a local address, they must correct and resubmit the form with the information above and designation to the local chapter. (The local campaign’s address should never be used as this information is verified with the IRS.) Should any questions arise, please contact Melanie Turner at 703-649-2027.

c. The Foundation has added a new link to our national website for Corporate Matching Gift (<https://www.toysfortots.org/donate/matching-gift.aspx>). Donors may check if their employer will match their donation by searching for their company name.

SECTION VIII --- PURCHASING METHODS AND PROCEDURES

8.1 Local Purchase using the Toys for Tots Purchase Card

The Coordinator of each unit, with an account in good financial standing – balanced, with all purchases reconciled with itemized legible receipts, and with a positive balance – will receive a Financial Institution purchase card from the Foundation. This card will be managed by the Foundation and will be used for authorized Toys for Tots purchases where credit cards are accepted. Purchase procedures are listed in section 8.3 below. Coordinators with Foundation-issued Purchase Cards will consider this the method of payment for all purchases; however, exceptions will occur. When questions arise, contact the appropriate Regional Campaign Manager to discuss.

8.2 Other Purchasing Methods

a. In the event the Purchase Card is not accepted, please use the following procedure (**using a personal credit card or other personal methods of payment is not authorized and will not be reimbursed**):

b. Check Request. Local Coordinators may request a check from the Foundation for the purchase of toys or other items; however, ACH is the preferred method. If a vendor must have a check, email a copy of the W-9 with an itemized legible receipt/invoice to their Regional Campaign Manager. **THIS IS THE PREFERRED METHOD. Before requesting a check for a vendor, ensure the vendor provides a W-9 to keep on file at the Foundation.** The Foundation prepares the check in the amount requested, makes it out to the vendor indicated, and then forwards the check to either the vendor directly or the local Coordinator. The local campaign account is debited when the check is prepared. Of note, checks are cut at the Foundation weekly on Wednesday's and take an estimated 5-7 business days of delivery.

8.3 Purchase Procedures

a. In all instances where purchases are made by Toys for Tots Coordinators, it is important to verify such purchases to the Foundation as soon as possible per the instructions listed below for a detailed flow chart showing this process (see Appendix O):

- 1) Verify Logbook (pending deposits) and Online Financial Report to determine how much is available to spend.
- 2) Develop a plan of action prior to shopping
- 3) Ensure you are following the purchase guidelines found in this SOP (again, see [Appendix O](#))
- 4) Make the purchase ensuring an invoice or itemized legible receipt is provided.

5) **Once the transaction has been posted to the Logbook in the Secure Section, immediately upload the corresponding itemized legible receipt.**

a) Complete the “For the purpose of” field (i.e., toys, gas, supplies, etc.). This specifies the purpose of the purchase.

b) Attach the itemized legible invoice/receipt to the Verification Request Form, note the “EMAIL VR” link next to each Verification Request. Clicking this link will automatically upload into the accounting platform for review by the Regional Campaign Manager.

c) If the vendor requires a check and the Coordinator wants it sent directly to him/her for hand delivery, email your Regional Campaign Manager with the W-9 from the vendor, itemized legible receipt/invoice and request for hand delivery.

6) **As stated earlier, the preferred method to send Verification Request Forms and invoices/itemized legible receipts to the Foundation is directly through the Secure Section.**

8.4 **Special Provisions for TFT Coordinators**

a. Toys for Tots Coordinators who receive donations late in the campaign can purchase against those funds if the Coordinator has followed the guidelines for making a deposit ([Section VII](#)). The Foundation will guarantee payment even though the donation has not arrived at the Foundation before the purchase is made. Appropriate account adjustments will be made upon receipt of the locally generated donations.

b. Occasionally, and always due to inattention to detail, a local Coordinator will overspend, and the balance will be a negative number. The Foundation covers such errors, but it is the responsibility of the local Coordinator to work closely with the Foundation to correct the mistake and return the account to a positive balance. This will take time, but the Foundation will work with a Coordinator to correct the error. While the account remains in a negative balance, the local campaign is indebted to the Foundation for the amount shown on the Online Financial Report. **If this happens continuously, the Coordinator will be put on probation or his/her approval will be revoked.**

8.5 **Fund Management Keys**

a. Fund management for the U.S. Marine Corps Reserve Toys for Tots Program must follow provisions of the Marine Corps Order, the Force Order and this SOP (see https://www.toysfortots.org/about_toys_for_tots/coordinators_corner/Default.aspx).

b. By using the toy purchase methods described in [Section 8.1](#) and [Section 8.2](#), local Toys for Tots Coordinators encounter no delay in purchasing toys.

c. Purchases of items other than toys, items for a group home/shelter, or conducting projects to increase local awareness or raise funds will occasionally occur. These are items that, when

purchased, could enhance the efficiency of the local campaign, items that could be purchased for the good of children in need in special care, or projects that could be conducted to ensure the success of a local campaign. These items are generally not distributed directly to children in need and the projects are designed to increase awareness and raise funds to support the local campaign. The Foundation recommends that such obligations **not exceed 15%** of the total annual donations received per community. **Before obligating funds for the purchase of such items or the initiation of such projects**, a written explanation of the purchase or project must be submitted to the Foundation for approval. This is to ensure that Toys for Tots donations are spent on items or projects that relate to the Toys for Tots mission.

d. Local Coordinators can, and should, visit the Secure Section of the local website frequently to view local account information and transactions recorded for verifying the account. Compare the amount shown in the Online Financial Report to ensure all transactions are accurate. If errors are noted, contact the appropriate Regional Campaign Manager to discuss. NOTE: errors do not include purchases or deposits that have recently occurred (within 10 days). Time must be allowed for transactions/deposits to process through the system.

8.6 **Purchase Guidelines/Limits**

a. Toys for Tots is not a government agency, but a private, not-for-profit, public charity entrusted with the care of the American public's hard-earned money. Items that are not related to accomplishing the Toys for Tots mission are not authorized (examples include, but are not limited to: clothing, food for distribution, cigarettes, lottery tickets, alcohol, paying off personal debt, etc.).

b. Purchasing items considered as Foundation assets is not authorized. Such examples can include but are not limited to: buildings, vehicles, shipping containers, computers, etc. Assets such as these are not authorized because most likely will cause a taxable event and the Foundation does not have the oversight or tracking capabilities on the staff. Assets may require registration (vehicles), property tax (buildings/vehicles), and they must be depreciated (all items) and reported on the Foundation's annual tax return (IRS Form 990). If a Coordinator is uncertain if their purchase is an asset, then a purchase approval form should be submitted through the Secure Section prior to paying for the item. The Regional Campaign Manager will review the request and route it to the Deputy Vice President, Operations for approval.

1) OF NOTE, IF AN INDIVIDUAL WANTS TO DONATE AN ITEM DESCRIBED ABOVE, CONTACT THE DEPUTY VICE PRESIDENT, OPERATIONS AS SOON AS FEASIBLE. DO NOT ACCEPT THE ITEM UNTIL YOU HAVE HAD POSITIVE COMMUNICATIONS WITH THE FOUNDATION. JUST AS PURCHASES OF ASSETS ARE NOT AUTHORIZED, THE FOUNDATION CAN ONLY ACCEPT ITEMS THAT ARE CONSIDERED ASSETS UNDER VERY STRICT GUIDELINES.

c. When shopping for toys, ensure that all are age and gender appropriate, as well as affordable. When purchasing toys for children, a spending limit for each item should be determined before making any purchase. While the Foundation can receive significant discounts

due to volume purchases, local Coordinators must take advantage of local sales and discounts whenever possible. **A spending limit of no more than \$35.00 per item has been established for the purchase of toys.** If an item being considered for purchase exceeds this amount, approval from the Foundation is required before funds are obligated. **The approval email must be scanned and attached with the itemized legible receipt to the corresponding VR.** This spending limit has been established to ensure that: 1) Toys for Tots can assist the maximum number of children possible; and 2) to ensure that Toys for Tots is fairly distributing gifts of similar value to recipients. While bicycles are routinely purchased, the cost per bicycle is generally greater than \$35.00; therefore, **a spending limit of no more than \$100.00 per bicycle is authorized without Regional Campaign Manager approval.**

d. Special discounts at retail stores are often accompanied by “fine print” and may lead to excessive work for ALL concerned. We have seen examples of this before Toys R Us liquidated. They would offer a free gift card or store item provided the total purchase was \$75.00 or more. Before making multiple purchases (\$75 each in the example), please think carefully about the additional workload added to the Coordinator due to having to upload an itemized legible receipt to each VR. The result: hundreds of extra receipts during a campaign.

e. Toys for Tots Coordinators rely on the continued service of volunteers to ensure a successful campaign is concluded each year. Volunteer services are invaluable, and all should be easily identifiable to the public during and thanked upon the completion of the campaign. There are many ways to recognize volunteer service; however, Coordinators should not purchase lavish gifts each year. Providing ID badges, T-shirts or sweatshirts are appropriate purchases that will enable the general public to identify volunteers that are assisting in the collection/distribution of toys. **The price of any item purchased with the intent to distribute to volunteers for identification or acknowledgement of their support shall not exceed \$25.00 per item.** Certificates, participation pins, or plaques are appropriate purchases to thank volunteers for their service. Often, a heartfelt thank you is all that is required to guarantee the return of a volunteer to participate in this program. **The first recommendation when recognizing volunteers/supporters is to utilize the stair-step approach. The cost of some plaques may exceed this limit. Fill out the Purchase Approval Form for approval BEFORE purchasing.**

f. If a Coordinator makes a purchase that exceeds the pricing limit guidelines as indicated above and does not submit the proper paperwork prior to making the purchase, they will be required to return the item(s). If such items are not returned, the Coordinator is responsible for reimbursing their local campaign account.

1) A Coordinator is authorized to purchase **no more than FIFTY (50) T-shirts and/or sweatshirts without approval if there are funds in the Online Financial Report.** If a Coordinator identifies a need to purchase more than 50 T-shirts and/or sweatshirts, he/she **WILL OBTAIN APPROVAL** from the appropriate Regional Campaign Manager **PRIOR TO PURCHASING.**

g. The purchase of food/drinks by Coordinators is limited to the following occasions:

1) Fundraising events: examples include, but are not limited to golf tournaments, road races, etc. Please remember that the Event Approval Form must be submitted and approved prior to the event taking place.

2) The purchase of bottled water or coffee for sorting and/or distribution days. The purchase of bottled water will not be excessive and will of course be verified via an itemized legible receipt uploaded to the Verification Request. Coffee will not be individual cups of coffee, i.e. volunteers will not be ordering individual Mochas from Starbucks! As an example, something like Dunkin' Donuts Box 'O Joe (<https://www.dunkindonuts.com/en/food-drinks/hot-drinks/box-o-joe>) is appropriate. Cream and sugar may also be purchased if it is comparable with the amount of coffee purchased. Again, these purchases will be verified via an itemized legible receipt when the Verification Request is submitted.

3) Campaign Kick-Off events or End-of-Campaign Thank You events (buffet style to limit expenses) to recognize local sponsors, key supporters, and volunteers.

4) Our donors, supporters, and volunteers expect us to spend our funds wisely – on toys, not food and drink. Questions regarding this policy are to be directed to the appropriate Regional Campaign Manager who will present the request to the Vice President, Operations for approval.

5) If a Coordinator is not hosting an event but intends to use Toys for Tots funds for any items to support an event (i.e., drinks, food, supplies, etc.) then a Purchase Approval Form must be submitted in detail PRIOR to purchasing.

g. Telephones may be purchased to augment existing phone lines to ensure Toys for Tots is directly available to the public, as well as the national Foundation; provided adequate funds are in a local account. The first course of action should be to utilize free services such as Google Voice or have the phones donated. The ability to communicate with the public and the Foundation is an essential element of a successful campaign. Should the local campaign opt to purchase telephones, the following are required:

1) First, there will be **NO SERVICE CONTRACTS**, i.e., no long-term agreements. **Coordinators will obtain pre-paid service plans.**

2) Up to four (4) phones may be purchased for a campaign site. The cost of each phone shall not exceed \$100.00. Once purchased the coordinator must fill out the Campaign Asset Form found on the Secure Section #6 Forms.

3) Pre-paid service plans for phones purchased with Toys for Tots funds **shall not exceed \$50.00 per month** and shall be for the duration of each campaign (generally October through January).

4) All phone numbers must be reported to the Foundation (appropriate Regional Campaign Manager) immediately after purchasing the phones and the plan.

5) Upon completion of the annual campaign, all phones must be turned over to the succeeding Toys for Tots Coordinator.

h. Online shopping has become very popular. We must, however, carefully consider the vendor with whom we conduct business, as, often, internet orders may be delayed due to inventory issues. Prior to placing such orders, please consider using a Toys for Tots vendor listed in [Section 8.9](#) below. Most of these vendors have sufficient stock of items on hand, and the purchase will not result in multiple charges on the Coordinators Purchase Card due to inventory issues. For example, an order of \$1,000 may have numerous receipts as the Purchase Card is not charged until items are shipped. Matching documents to correctly track our donated funds becomes challenging when purchasing online. If shopping online, **UNDERSTAND THAT THE PURCHASE ORDER THAT IS IMMEDIATELY EMAILED IS NOT THE RECEIPT.** Once the transaction is populated to the logbook, ensure that the receipt being submitted matches the verification total.

i. The following items are **NOT AUTHORIZED**:

1) Toys for Tots will not authorize the use of Toys for Tots funds when the operator of a vehicle has been cited for reckless operation of the vehicle. The driver responsible for an accident must pay for any ticket issued and must use his/her insurance company to cover all repairs to any/all vehicles involved.

2) Toll bills that are the result of a driver “running” a toll booth without paying the toll and any penalty will be paid by the driver whose actions caused Toys for Tots to receive the bill and any penalty because of this action.

3) In both above examples, an accident/incident report must be filed/initiated to provide details and determine fault.

8.7 **Toy Buying/Age Recommendations**

Every year Coordinators request guidance concerning the ages for which purchases/distributions of toys are made. Donors normally support Toys for Tots with gifts for children ages 3-8 years. The final decision concerning the age limitation a local campaign will support lies with the local campaign Coordinator. Several factors will play an important part in coming to this decision. These factors include but are not limited to; 1) donation support in the community; 2) ages of the children in need registered in the local community; and 3) local campaign ability to support by either distributing donated toys or purchasing with funds from the local account. Most Coordinators conclude that serving the needs of children from ages less than one year old to twelve years old provides a suitable challenge each campaign year.

8.8 **Unit/LCO Account Safeguards**

To ensure prompt payment of all bills, the Foundation will execute payment of all invoices when they reach the 20–25-day mark, even if the necessary paperwork has not been received. This

does not relieve a Coordinator of the responsibility to complete and submit the form but does ensure the Foundation retains the reputation for paying all bills in a timely manner. **IF A COORDINATOR FAILS TO SUBMIT THEIR PURCHASE RECEIPTS IN A TIMELY MANNER, THEY WILL BE PUT ON PROBATION OR THEIR APPROVAL WILL BE REVOKED.**

8.9 **List of Vendors**

a. Due to the Foundation’s established business relationships with toy companies and brokers, it can purchase toys/books at reduced prices. In many states the Foundation can purchase toys without having to pay state sales tax, thereby increasing its purchasing power. Contact your Regional Campaign Manager for more information or to receive your Sales & Use Tax Exemption certificate (if your state requires it).

b. The below list comprises toy vendors that the Foundation works directly with to purchase toys for the Supplemental Toy Program (see [Section 4.2](#)). These vendors will also work directly with individual Coordinators allowing them to purchase toys at wholesale prices and have the toys shipped directly to the campaign’s warehouse.

TOY VENDORS

Discovery Toys	
<ul style="list-style-type: none"> • Website: http://www.kidslearnthruplay.com/ • POC: Jana Norton • Phone: (301) 529-3344 • Email: discovery2learn@yahoo.com • Notes <ul style="list-style-type: none"> ○ Purchase using the Toys for Tots Purchase Card ○ Discovery Toys provides a minimal 20% discount on local campaign purchases 	

Ground Zero	
<ul style="list-style-type: none"> • Website: www.GroundZero4Toy.com • POC: James Baskin • Email: baskin.james@ymail.com • Notes: Purchase using the Toys for Tots Purchase Card 	

Group Sales

- Website: www.groupsalesinc.com
- POC: Marine Corps Units
 - Robert Myers
 - rmyers@groupsalesinc.com
 - Direct Line: (513) 559-3323
 - Cell Phone: (513) 477-1487
- POC: LCOs
 - Steve Zix
 - szix@groupsalesinc.com
 - Direct Line: (513) 458-1504
 - Cell Phone: (513) 679-1518
- Notes
 - Purchase using the Toys for Tots Purchase Card
 - Group Sales provides 10% of total purchase as a donation back to the Foundation and Local Campaigns



HDI, Inc.

- Website: <https://www.hdiforu.com/>
- POC: Sara Depies
- Phone: (800)-284-5449
- Mobile: (414) 491-0776
- Email: sara@hdiforu.com
- Notes
 - Purchase using the Toys for Tots Purchase Card
 - Shop website anytime. Login and password will be emailed or contact us at CustomerService@HDIforU.com
 - Download our Toys for Tots 2023 catalog at <https://www.hdiforu.com/toys-for-tots-catalog>



New England Doll & Novelty Co., Inc.
(Established 1918)

- Website: www.nedollco.com
- POC: 1stSgt Martin T. Hughes, USMC (Ret)
- Cell: 412-287-3788
- Email: mthughes9999@yahoo.com
- Notes
 - Offering a large variety of toys, electronics, and sports items for ages 0 to 17.
 - Provides a 20% donation back to Toys for Tots.
 - Sells only to nonprofit children's charities. Philanthropist run.
 - 4th generation family business established in 1918, veteran family.
 - Purchase using the Foundation's credit arrangements.
 - Free shipping on all orders, delivered on your designated day.
 - Minimum order is one full trailer load.



OnTime Toys

- Website: <http://www.ontimetoy.com/>
- POC: Chris Thifault
- Phone: (800) 464-8762
- Email: ct@ontimetoy.com
- Notes: Orders should be made using the Foundation's credit arrangements



Rhode Island Novelty

- Website: <https://www.rinovelty.com/>
- POC: Hutch Costello
- Phone: (800) 435-3456
- Email: HCostello@rinovelty.com
- Notes
 - Purchase using the Toys for Tots Purchase Card
 - Contact Hutch Costello to learn more about the special buying program for toys that all campaigns are eligible for.



TK's Toy Box

- Website: <https://www.tkstoybox.com/>
- POC: Tara Kennedy-Kline
- Phone: (484) 824-2160
- Email: tara@tkstoybox.com
- Notes
 - Purchase using the Toys for Tots Purchase Card
 - Free freight on all Coordinator orders
 - 10% free toy allowance on orders placed before Dec 10th



WowToyz

- Website: <http://www.wowtoyz.com/>
- POC: Melody Miller
- Phone: (802) 877-2150
- Email: melody@wowtoyz.com
- Notes: Purchase using the Toys for Tots Purchase Card



BOOK VENDORS

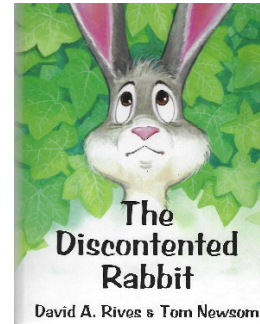
Book Depot

- Website: <https://www.bookdepot.com/>
- POC: Rob Chapman
- Phone: (o) 800-801-7193 x283
(m) 905 980-1080
- Email: rob@bookdepot.com
- Notes
 - Purchase using the Toys for Tots Purchase Card
 - Book Depot provides a minimal 15% discount on local campaign purchases



Moon River Publishing

- Website: www.MoonRiverPublishing.com
- Product: Super Children's Book:
<https://online.flippingbook.com/view/305633692/>
- POC: David Rives
- Phone: (800) 522-7735
- Email: davidrives@hotmail.com
- Notes:
 - 5% discount when pre-paying, with Toys for Tots Purchase Card
 - Free freight on all Coordinator orders



Scholastic

- Website: <https://shop.scholastic.com/teachers-ecommerce/face/facepartner.html>
- Notes
 - Purchase using the Toys for Tots Purchase Card
 - Scholastic provides up to a 60% discount on local campaign purchases using the Family & Community Engagement initiative
 - Coordinators can connect directly with their local representative for book planning by entering their zip code:
<https://education.scholastic.com/education/contact.html>



OTHER VENDORS

Mercy USA (toys) - <https://mercyusa.us/> or 1-866-456-2869.

Target/Wal-Mart/Other Retail Outlets – Purchase using the Toys for Tots Purchase Card.

Arnolds (*Appreciation Plaques*) – Phone orders may be made using the Toys for Tots Purchase Card. Call 530-677-0623. Fax 530-677-6065.

The Charleston Mint (*TFT Christmas Ornaments*) – Phone orders may be made using the Toys for Tots Purchase Card. Call 1-828-883-8988 if interested.

EA Promos (*Shirts, Hats, And Awards*) – Company website: www.eapromos.com. Toys for Tots portal: www.toysfortotspromo.com.

Graphic Printing & Design (*T-Shirts/Hats*) – Phone orders may be made using the Toys for Tots Purchase Card. Call 1-319-338-9744 if interested.

John Wills Studios (Plaques) – Phone orders may be made using the Toys for Tots Purchase Card. Call 1-757-468-0260 if interested.

Marine Corps Association (Awards/Plaques) – Phone orders may be made using the Toys for Tots Purchase Card. Call 1-888-237-7683 if interested.

Marine Corps Direct (T-Shirts/Hats/Promo Items) – Phone orders may be made using the Toys for Tots Purchase Card. Call 1-850-497-2044 for customer service. Website address: www.marinecorpsdirect.org (click on the Shop Toys for Tots link)

Military Promotions (Coins/Ornaments/T-Shirts/Hats/Plaques/Awards) – Phone/email orders may be made using the Toys for Tots Purchase Card. Call/visit 1-936-291-2304 or smith@milpromo.com.

Personalized Just for You (Plaques) – Plaques that are 100% Made in the USA. Standard wood plaques with key hole slots on the back and come personalized with the campaign's name and the recipient's name. Purchases may be made using the Toys for Tots Purchase Card. Call 1-888-987-4838 or email manager@T4Tawards.com. Point of contact is Phil or Glynis Darbonne. Go to their website for more information at <https://purpleheartstore.com/store/ols/categories/toys-for-tots>.

The Premium Connection (Wholesale Gifts, Gadgets and Premiums) – Phone (800) 683-0933 for customer service. E-mail Rick Worth: rickw@premiumconnection.net. Purchase using the Toys for Tots Purchase Card.

Truck Rental – Purchase/Rent using the Toys for Tots Purchase Card at local truck rental stores. Discounts may be available. **DON'T FORGET TO PURCHASE INSURANCE!**

- Ryder: The Foundation has a partnership with Ryder who has graciously discounted the cost to rent a vehicle. Please see Memo 007 or you can call 1-800-345-9282 or visit <https://www.ryder.com/en-us/rent-trucks> if you have any questions. Note that the Account Name is **Marine Toys for Tots Foundation** and the Account Number is **042442**.

SECTION IX --- PURCHASE CARD POLICIES AND PROCEDURES

9.1 **Purchase Card Program**

The Marine Toys for Tots Foundation Purchase Card Program is principally designed to provide Coordinators with the capability to purchase additional toys and gifts to supplement their toy collection efforts. The Purchase Card Program additionally assists in the management and payment of business-related purchases and brings many benefits to local Coordinators, MTFTF, vendors, and the Toys for Tots program. The Purchase Card is designed to streamline the procurement process from beginning to end. The goal for the purchase card is to eliminate the use of traditional purchase orders (except when ordering toys from selected Foundation approved catalog vendors) and check requests. The Purchase Card has built-in spending controls to prevent inappropriate purchases.

9.2 **Benefits**

a. The Purchase Card Program is designed to benefit:

1) **Cardholders**. The Purchase Card streamlines the purchasing procedure and can help improve turnaround time on the delivery of any order.

2) **Toys for Tots**. The Purchase Card program provides a cost-efficient method for purchasing and payment of business-related purchases and is the principal method of payment for all Toys for Tots purchases. The Purchase Card has built-in features that make the program easy to control and manage and therefore reduces processing costs at all levels by minimizing the number of procurement-related invoices and checks. The Purchase Card enables all elements of Toys for Tots to focus on higher value-added activities.

3) **Vendors**. The Purchase Card will be welcomed by vendors who accept Visa. All the vendor is required to do is provide a paid itemized legible receipt to the Cardholder, i.e., Coordinator.

4) The success of the Purchase Card Program and its continuing use depends upon the conscientiousness and cooperation of local Coordinators.

9.3 **Contact Information**

a. For all Purchase Card inquiries contact your respective Regional Campaign Manager by one of the options listed below:

1) **E-mail**: Call the Foundation (or visit the Secure Section of the local website - <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/>) for email address information.

2) **Phone**: (703) 640-9433 or the direct telephone numbers on pages 2-3 of this SOP.

3) Mail: Marine Toys for Tots Foundation, **Attn: Region __ Regional Campaign Manager**, 18251 Quantico Gateway Drive, Triangle, VA 22172

9.4 Obtaining a Card

a. The Purchase Card is a credit card specifically for the Marine Corps Reserve Toys for Tots Program. A Purchase Card will be provided to Toys for Tots campaign sites with accounts in good standing. The Foundation will approve all card holders. Each applicant is required to read through the Purchase Card Guidelines and complete the Toys for Tots Purchase Card Agreement at [Appendix M](#) annually. The Purchase Card Agreement form is to be emailed to the appropriate Regional Campaign Manager, who will submit a complete roster to our financial institution. Once the roster is received, a Purchase Card is mailed to the Foundation, normally in three to five workdays. The Foundation will then process all cards and mail to each Coordinator. Included in the activation instructions may be a PIN for the enclosed card (**do NOT forget, as the PIN may be required each time a purchase is made**). Whenever the associated zip code to a purchase card is requested, **the zip code is the Foundation's (22172), and NOT the Coordinator's local zip code.**

b. The Purchase Card is a corporate credit card, which will not affect the Cardholder's personal credit. However, it is the Cardholder's responsibility to ensure that the card is used within the stated guidelines of this Purchase Card Policies and Procedures as well as policies and procedures relating to the expenditure of Toys for Tots funds.

c. Cardholders should always treat their Purchase Card with the same level of care one gives to his/her personal credit cards. The card should be maintained in a secure location and the card account number should be carefully guarded.

9.5 Types of Purchases

a. The intent of the Purchase Card is to assist Toys for Tots Coordinators/volunteers with the purchase of and payment for all Toys for Tots related goods and services. The Foundation will notify each site about specific spending categories and limits (i.e., transaction limits, daily limits, monthly limits, etc.); however, below are some general guidelines for the various groups of cardholders:

1) Foundation Personnel:

- a) The monthly limit for your Purchase Card is assigned by the Foundation.
- b) The Purchase Card is the preferred method of payment and should be used before opting for any other means of payment.

2) Toys for Tots Coordinators:

a) The Purchase Card is a declining balance account (equivalent to a debit card)

b) The daily or monthly limit for your Purchase Card is the total balance in the local account (as shown in the Online Financial Report: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/financial-report/>).

c) The Purchase Card will be used for all business-related travel and related expenses.

b. The above guidelines are general guidelines. Because of unique situations for each Cardholder, specific limits may be slightly different. To determine specific guidelines, or to discuss changes to existing guidelines, please contact the appropriate Regional Campaign Manager.

c. All purchases must be for business-related purchases only. Purchases not related to Toys for Tots purchases are prohibited and the Cardholder may be subject to disciplinary action.

9.6 **Reconciliation and Approval**

Cardholders will upload itemized legible receipts to the Foundation through the Secure Section for each completed transaction as each purchase occurs. The appropriate Regional Campaign Manager will then review the statement and itemized legible receipts and notify the local Coordinator of any discrepancies. **In the event receipts are not submitted in a timely manner, a hold will be placed upon the account in question until all materials have been submitted.**

9.7 **Credits**

Vendors will issue all credits directly to the individual Purchase Card account for any items they have agreed to accept for return. This credit will appear on a subsequent statement. **UNDER NO CIRCUMSTANCES SHOULD A CARDHOLDER ACCEPT CASH OR GIFT CARDS IN LIEU OF A CREDIT TO THE PURCHASE CARD ACCOUNT. A verification form and itemized legible receipt must be submitted for credit.**

9.8 **Disputed Charges**

The Cardholder is responsible for contacting the vendor to resolve any disputed charges or billing errors within 30 days of the transaction appearing on the online financial report. If the matter is not resolved within 30 days, the Cardholder must contact his/her respective Regional Campaign Manager and complete appropriate documentation.

9.9 **Rejected Purchases**

A vendor, for several reasons, can reject a Cardholder's card. First, the transaction amount may be greater than the authorized amount on the card. Second, the transaction may result in the Cardholder exceeding the credit limit. Third, the Cardholder may be attempting a transaction at an unauthorized vendor or vendor type. Fourth, the Cardholder may be using the wrong PIN or

zip code associated with the card. However, if a Cardholder feels that he/she was erroneously declined, contact the appropriate Regional Campaign Manager for additional assistance.

9.10 **Account/Cardholder Termination**

a. The Purchase Card Administrator is required to close an account if a Cardholder (a) transfers to a different location, (b) moves to a new job within Toys for Tots in which a Purchase Card is not required, (c) terminates his/her association with Toys for Tots, or (d) for any of the following reasons, which will also subject the Cardholder to disciplinary action in accordance with Toys for Tots Policies and Procedures:

- 1) The Purchase Card is used for personal or unauthorized purposes.
- 2) The Purchase Card is used to purchase alcoholic beverages or any substance, material, or service which violates Toys for Tots policies, laws or regulations.
- 3) The Cardholder splits a purchase to circumvent the limitations of the Purchase Card.
- 4) The Cardholder uses another Cardholder's card to circumvent the purchase limit assigned to either Cardholder or the limitations of the Purchase Card.
- 5) **The Cardholder fails to upload itemized legible receipts for all transactions.**
- 6) The Cardholder fails to provide, when requested, information about any specific purchase.
- 7) The Cardholder accepts a cash refund in lieu of credit to the Purchase Card account.
- 8) The Cardholder does not adhere to all the Purchase Card policies and procedures.

b. The improper use of the Purchase Card may lead to disciplinary action, up to, and including prosecution and termination of all association with Toys for Tots.

9.11 **Lost or Stolen Purchasing Cards**

In the event of a lost or stolen Purchase Card, the Cardholder is required to immediately contact his/her Regional Campaign Manager (during normal business hours) and she will ensure appropriate action is taken. If after business hours or on a weekend/holiday, immediately call the number on the back of your card, then notify your Regional Campaign Manager via email. Call the appropriate Regional Campaign Manager on the first business day after the loss/theft occurred.

9.12 **Cardholder Responsibilities**

a. The Cardholder must use the Purchasing Card for **legitimate Toys for Tots purposes only**. Misuse of the card will subject Cardholder to disciplinary action in accordance with Toys for Tots Policies and Procedures. The Cardholder must:

- 1) Ensure that the Purchase Card is used for legitimate business purposes only.
- 2) Maintain the Purchase Card in a secure location always.
- 3) Adhere to the purchase limits and restrictions of the Purchase Card and ensure that the total transaction amount does not exceed the preset spending limits.
- 4) Obtain a receipt or packing slip with item price, shipping, and tax information for ALL transactions.
- 5) Reconcile the online financial report to the receipts and/or packing slips each month.
- 6) Contact the appropriate Regional Campaign Manager if a vendor does not accept Visa for purchases.
- 7) Report erroneous declines or fraudulent charges to the appropriate Regional Campaign Manager.
- 8) Attempt to resolve disputes or billing errors directly with the vendor within 30 days and notify the appropriate Regional Campaign Manager if the dispute or billing error is not satisfactorily resolved. Disputes or billing errors should be reported to the appropriate Regional Campaign Manager immediately.
- 9) Ensure that the correct credit for the reported disputed item or billing error appears on the campaign's Online Financial Report: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/financial-report/>.
- 10) Not accept cash in lieu of a credit to the Purchase Card account.
- 11) If a card is lost or stolen, first contact the respective Regional Campaign Manager. The Foundation Regional Campaign Manager will ensure appropriate action is taken. If you are unable to reach the Regional Campaign Manager, **immediately contact the financial institution via the number on the back of the Purchase Card.**

SECTION X --- FOUNDATION AND LOCAL WEBSITES

10.1 Foundation Website

a. The Foundation public website may be found at the following address:

1) www.toysfortots.org

2) This site has been designed for educating and making the general public aware of the U.S. Marine Corps Reserve Toys for Tots Program and give them an opportunity to support the program by donating to either the national or local efforts.

b. The Foundation secure website may be found at the following address:

1) <http://lco-admin.toysfortots.org>

2) This site has been designed for storing campaign site specific information in a way that offers access to the local coordinator, but ensures local, confidential information remains unavailable for viewing by the general public.

c. A Help and Support System is available to aid with the local website. Online help maybe be accessed through the Help menu. If additional assistance is needed, a support ticket system is available. Use the Submit a Support Ticket option in the Technical Support section of the Control Panel Home Page to request help or submit a suggestion for the Local Website System.

10.2 Local Campaign Website Control Panel

a. The Local Website System may be found at the following address:

1) <http://lco-admin.toysfortots.org>

b. Since 2009, the Foundation has had local websites under the umbrella of the Foundation site. Due to the continued success of the local websites, **contracting web design companies or developing a campaign's own personal Toys for Tots website is NOT authorized**. Campaign funds spent for such purposes will not be approved by the Foundation. Comments, suggestions, and recommendations for improving the local sites are encouraged.

c. To get to a local Toys for Tots website from an internet browser, the following is an example of the unique universal resource locator (URL) necessary to reach the appropriate site:

1) <http://localdomain.toysfortots.org> (example: bellingham-wa would be substituted for local domain for the Bellingham, WA campaign site)

d. Local websites will look much like the Foundation website. This online “branding” will readily identify local sites as legitimate Toys for Tots campaign locations. Much information

from the Foundation site will automatically populate the local site. In addition, many sections of the local site will have an “edit” capability to allow for updating information, events, sponsors, and instructions to supporters and recipients alike.

e. Capabilities included on local websites currently include:

- 1) Online Donations
- 2) Toy Drop Off Locations
- 3) Request Toys
- 4) About Toys for Tots
- 5) Our Partners
- 6) Frequently Asked Questions
- 7) Contact Us
- 8) Local TFT News
- 9) Local TFT Events

f. Given the size of the Foundation staff, it is unrealistic to expect total management of the over 860 Toys for Tots websites; therefore, the ability for local coordinators to manage/change information on the local websites has been included in this project. It is recommended that local coordinators assign a member of their staff/organization to monitor the local website and keep the information on it as current as possible. Outdated information will turn away potential donors!

g. A Help and Support System is available to aid with the local website. Documentation and online help may be accessed in the Technical Support section of the Control Panel Home Page in the top right corner. If additional assistance is needed, a support ticket system is available. Use the Submit a Support Ticket option in the Technical Support section to request help or submit a suggestion for the Local Website System.

h. The utilization of local websites will enable the Foundation to track donations to their source. Campaign sites will greatly benefit from this added capability. In years past, all donations received from online donors were deposited into the national fundraising account. Since this project enables tracking to the source, donations are transferred from the Foundation to the appropriate campaign site weekly during the campaign and monthly February through October.

10.3 **Local Campaign Website Control Panel - Secure Section**

a. The Secure Section of the Local Campaign Website Control Panel site enables Coordinators to manage all their administrative responsibilities. You will review your purchases, upload receipts, record deposits, and verify your account. The following information describes the mechanics of how to do those actions. Each year at the annual Coordinators training conference, the Regional Campaign Managers as well as the IT Specialist provide in-depth training on the Local Campaign Website Control Panel. With that training and the information below, you should have no problem navigating the site and performing the administrative duties of a Coordinator. As always, the Foundation is here to answer any questions that you may have. Before describing the mechanics of the site, the following definitions/explanations are provided:

1) Unit Logbook. In this document you upload all itemized legible receipts and enter deposits accordingly.

2) Financial Report. An online document that is equivalent to your bank statement. This form is updated daily by the Foundation. It records all transactions that occur within your campaign account including deposits (locally sent in and Foundation transferred) and expenses (checks written and credit card transaction).

3) Verification Request (VR) / Receipts. This form is your expense report defining the date of purchase, the purpose of the purchase, and the vendor. The receipt must be an itemized legible receipt of the transaction to include items purchased, quantity of each item and its corresponding price. These two documents together (VR and itemized legible receipt) are submitted through the Unit Logbook directly into the accounting platform.

4) Deposits, i.e., donations. The online deposit form documents the checks that have been received locally and cash that has been exchanged into a money order / cashier's check. The Coordinator will list the check number, donor name, donation amount, and the total amount of the donations. Deposits should be verified by a second person, i.e., use the two-person rule (see [Section 7.3](#)). This form is saved into the Unit Logbook. There will also be a copy printed and submitted with the checks in the overnight courier envelope that is sent to the Foundation's caging company in Boone IA.

5) Weekly Status Report. This tool is utilized to track a campaign's progress on a weekly basis. Coordinators record toys collected and distributed as well as funds donated. The weekly totals are then aggregated into the AAR at the conclusion of the campaign.

6) After Action Report: The Annual After-Action Report (AAR) is the primary report/document that the coordinator submits that describes what occurred during the campaign. It is an official document identifying the number of toys collected and distributed, the number of toys purchased, the number of children assisted, and how much money was donated. It is due on 15 January. This report contains essential information the Foundation must compile for release to the U.S. Marine Corps, corporate sponsors, independent auditors, the IRS, State Attorneys General, and the American public. See [Section 5.14](#) for additional information.

b. Unit Logbook:

1) After uploading and attaching itemized legible receipts to a Verification Request, note the “EMAIL VR” link next to each Verification Request. Clicking this link will automatically upload into the accounting platform for review by the Regional Campaign Manager.

c. Financial Report. The only change with the Financial Report is the added running balance to the right-hand column and a “TOTALS” line at the bottom of the report.

d. Deposits:

1) Fill out the Deposit Slip and click the Submit button to add it to the Unit Logbook.

2) Editing and Deleting of Deposit Slips may now be performed by clicking on the Edit icon (pencil and paper clip) or Delete icon (red trash can) next to each line item in the Unit Logbook.

e. Verification Requests (VRs):

1) Scanned images or PDFs of receipts may now be uploaded and attached.

- (a) Book and click the Edit icon next to the VR to which a receipt is to be attached.
- (b) At the bottom of the VR form note the link to "Add Receipt" link. Click on the link.
- (c) Click the Choose File button to browse for and select a receipt to attach.
- (d) Add a MEMO to the attached receipt for identification purposes.
- (e) Click the Submit button to upload and attach the receipt.
- (f) To “EDIT” or “DELETE” an attached receipt, click on the "Edit Receipt" link at the bottom of the VR “EDIT” form.
- (g) Click the "Edit Receipt" or "Delete Receipt" link next to the corresponding receipt. Add additional receipts to the VR by clicking the "Add Receipt to VR >>" link at the top of the page.
- (h) Once finished adding receipts to the VR, click the View icon (red printer) or Edit icon next to a VR in the Unit Logbook to see/review the attachment(s).

2) Once scanned itemized legible receipts are uploaded and attached to a Verification Request, note the Email VR icon (blue envelope) next to each Verification Request in the Unit Logbook. Once the itemized legible receipt is attached to the VR it will automatically upload into the accounting platform for review by the Regional Campaign Manager.

3) Adjustments. To adjust Deposits and Verification Requests, use the Edit icon next to each transaction in the Unit Logbook.

4) Notes:

a) Simply submitting a VR and attaching itemized legible receipts to it will not email it to your Regional Campaign Manager. You MUST click the Email VR icon for it to be emailed.

b) The Email VR icon is only visible AFTER receipts have been attached to the VR.

c) There is a size limit to the VR Email that can be sent. That limit is currently set at 2 MB. The size of the email is based on the size of the VR plus attached receipts. It may be necessary to resize your scanned receipts in order to avoid exceeding this limit. Especially if you are attaching multiple receipts or multiple page receipts. Most scanners and phones produce high resolution files that can exceed the limit by themselves. To avoid this issue, receipt files should either be scanned or resized to fit a dimension area of 800 pixels wide by 1000 pixels tall. This is basically the size of a standard piece of printer paper. There are directions for how you can resize your receipts on the Add/Edit Receipt form.

f. Reports:

1) Access the Weekly Status Report and Weekly Status Report Log.

a) The Weekly Status Report will be the Report for the current week of the campaign season. It is not required to use the Weekly Status Report, but we recommend it, as the After-Action Report will pull any data entered from the Weekly Status Report during the campaign and save valuable time when it is time to complete the AAR.

b) The Weekly Status Report Log may now be edited. Click the Report number link in the far-left column of the Log, then make any necessary changes.

2) After Action Report:

a) The After-Action Report is not available until the completion of the campaign season in the first week of January. Previous campaign After Action Reports may be viewed at any time.

3) Required insurance information for warehouse space / storage or events is now an online form that may be completed/submitted via computer.

4) Requests for Supplemental Toys may be completed online and submitted beginning on 1 December.

g. Printing Forms and Reports. Some campaigns may find that when printing out Verification Requests or Deposit Slips, they print out smaller than in the past depending upon the internet browser being used. If this the case, use the Print Preview option before printing to adjust the scaling of the printout to the desired size.

10.4 Cyber/Internet/Website Security

a. Website Information/Common Problems/Reminders

1) Common problems encountered in trying to get to either Toys for Tots website include:

a) For either website: Security settings on the computer may require adjustment. Identified issues related to operation and performance of the websites should be submitted to the Foundation IT Specialist via Support Ticket or email.

b) Do not try to access the sites from search engines (Google, Yahoo, etc.). Use only your system's internet browser (Firefox, Internet Explorer, Google Chrome, or Safari, to name a few).

b. Information listed below may be found on the Foundation's public website (<http://www.toysfortots.org>), the secure website (<http://lco-admin.toysfortots.org>), or the local campaign website (example: <http://quantico-va.toysfortots.org>):

- 1) Marine Corps Order 5726.14F (Applies to all) – public
- 2) Marine Forces Reserve Order 5000-24.2_ (Applies to all) – public
- 3) Foundation Standard Operating Procedures Manual (Applies to all) – public
- 4) Application to participate in the current TFT Campaign (Applies to LCO's only) – public
- 5) Foundation Contact Information – secure
- 6) After Action Report Form (Applies to all) – secure
- 7) Local campaign financial information – secure
- 8) GIK Toy and Service Support Letters – secure
- 9) IRS Letter of Determination (SOP [Appendix E](#)) – public AND Secure Section

- 10) Sample Gift in Kind Letters – secure
- 11) Local Toys for Tots Events – local
- 12) Toy Drop Off Locations – local
- 13) How to request toys – local
- 14) Local news – local

IT Security Reminders

a. Since the Foundation has moved a large amount of information onto the national and local websites, it has become increasingly important to focus on cyber security. In every aspect of this program, the first and foremost concern is the protection of the reputations and images of the U.S. Marine Corps and the Marine Toys for Tots Program. The American public is counting on both the Marine Corps and the Foundation to carry out this program in an impeccable manner. As such, listed below are some reminders to keep all focused on that concern:

- 1) Ensure all proposed content reflects positively on the Marine Corps and Marine Toys for Tots
- 2) Protect the local username and password
- 3) Review/clean the local website before AND after each campaign.
- 4) Remove outdated information.
- 5) Do not share data collected on the website (donor, volunteer, or recipient alike)
- 6) Use only “trusted” content. This is content that you know the legitimacy of the source.
- 7) Use images only if permission has been granted to avoid copyright infringement.
- 8) Know the websites you include links for in your website and the content and links on those websites. While the website you are including a link for may be for a legitimate entity, links on their website may lead to other websites that could reflect poorly back on the Marine Corps and Marine Toys for Tots.
- 9) Proofread all proposed content. If not sure of content, ASK QUESTIONS
- 10) Keep content simple and easy to read. Applying multiple formatting to your content such as bold text and colored text can have the opposite effect you intend. Supporters are coming

to the websites to get information. They need to be able to read it quickly and easily without the distraction of odd formatting.

11) Avoid using personal or business email addresses – Use disposable addresses (Google, Yahoo, Outlook, etc....) Remove or edit to state public email address is to be the TFT provided @toysfortots.org address.

12) Keep backup content of the website. Create content on a computer, then copy/paste to the website.

13) Website/Social media platforms are used to promote the mission and goals of Marine Toys for Tots; NOT platforms to promote personal opinions and/or agendas

14) Social media platforms are OPEN forums where information may be posted, shared, and commented upon with little oversight. KNOW what is being posted, as well as comments

15) Activate administrative control settings over an account. Public postings must require approval before a post is made public

16) Deactivate/cancel social media account(s) if not continuing with the campaign OR hand over control of the account(s) to the incoming Coordinator

10.5 **Additional Information Technology Guidelines**

a. The following guidelines pertain to the use of technology to support your local campaign. Technology provides many opportunities to improve the efficiency of your Marine Toys for Tots campaign. However, technology changes at a very rapid rate and it is important that all campaigns use caution when considering supplementing their campaign with any technology not provided by the Foundation.

b. To ensure any technology being considered for use by a campaign does not pose a risk to the security, information, and image of the United States Marine Corps, the Marine Toys for Tots Program, or Program donors and sponsors, all third-party technology must be approved by the Foundation before it can be deployed.

c. The following technologies are typical resources used by campaigns to operate and therefore addressed here specifically. Any additional questions pertaining to these technologies or any not covered should be addressed to the Foundation Director of Information Technology, Matthew McDonald at matthew.d.mcdonald@toysfortots.org.

1) Email Edit to state public email address is to be the TFT provided @toysfortots.org address.

a) Email is an important tool for campaigns to communicate with their community and their community to communicate with them. All campaigns must utilize the provided

toysfortots.org email accounts. This establishes professional and consistent accounts that can be maintained year after year through multiple Coordinators.

b) If the campaign will be managed by a different Marine or Coordinator the following year, the provided toysfortots.org email account can be easily updated for the new Coordinator.

2) Phones

a) The Foundation allows campaigns to acquire cell phones according to guidelines previously defined in the SOP (see [Section 8.6.f](#)). Refer to those sections for acquisition and proper use guidelines or contact your Regional Campaign Manager for additional information. When possible, campaigns should NOT use personal or business phones and/or phone numbers for communication between the campaign and the community.

b) If a campaign chooses to use their personal and/or business phones, the Foundation recommends doing so with the use of services such as Grasshopper (www.grasshopper.com) which will provide a campaign with one or more phone numbers that can mask phone numbers and transfer calls to and from your phone(s).

3) Social Media

a) Social Media provides the ability for campaigns to communicate with large audiences of local supporters. Specific guidelines for social media platforms such as Facebook and Twitter are provided in the Marketing Guide that the Marketing & Development office at the Marine Toys for Tots Foundation publishes annually. You can find that document on the Secure Section under the Tools section (Miscellaneous Folder), under 4. Miscellaneous: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/miscellaneous/>. Campaigns should review the guidelines on an annual basis to ensure they are properly managing and securing those platforms.

b) Use of additional Social Media platforms should be reviewed by the Foundation IT Specialist before being deployed.

c) The most important responsibility of campaigns when using Social Media platforms is ensuring any content disseminated on a campaigns account upholds the image and reputation of the United States Marine Corps and the Marine Toys for Tots Program. The Foundation recommends a campaign subjects content to the “Newspaper” test. Before posting information or images, the campaign should consider how the information would be received if it shows up in an article in a print newspaper or online news website. If there is a possibility that the information or images could be perceived or interpreted in a negative manner by the community or press, the information should NOT be posted. If you are not sure about the nature of your content, contact the Foundation’s Social Media Manager, Director of Information Technology, your Regional Campaign Manager, or the VP of Operations before posting the content.

4) Third-Party Online Services

a) **BOTTOM LINE UP FRONT (BLUF): No Third-Party Services are permitted without Foundation approval!**

b) There are many online services that campaigns could potentially purchase and subscribe to supplement their campaign operations. This includes, but is not limited to, domain registration and hosting, website design and development services, online donation platforms, online event registration, online application and form submission databases, Customer Relationship Management (CRM) services, email marketing, and surveys and questionnaire platforms.

c) All these online services have their own Terms of Agreement, Terms of Service, Privacy Policy, Data Ownership and Sharing Policy, Data Security, and Legal Terms that are not governed and owned by the Foundation. Signing up for such a service makes you, and possibly the Foundation, legally bound to those terms and policy. Signing up for a service without first understanding the terms and policy of that service exposes you and Marine Toys for Tots and program supporters to potential risk.

d) Data collected and stored with these services becomes property of the vendor and can be used in whatever manner they designate in their terms and policies. This risks exposing the personal and financial information of donors, supporters, and the families requesting assistance to entities not associated with Marine Toys for Tots and used for purposes not in support of Marine Toys for Tots and intended by those providing the information.

e) Whether it is a free or paid online service, a campaign is required to have the technology reviewed and approved by the Foundation BEFORE acquiring and deploying the technology. Failure to do so may result in denial of expenditures, termination of your campaign, and legal action against you and/or Marine Toys for Tots.

5) Third Party Technology

a) **BOTTOM LINE UP FRONT (BLUF): No Third-Party Technology is permitted without Foundation approval!**

b) Technology hardware is another potential asset to a campaign. Cell phones have been previously addressed, but this also can include, but not limited to, computers and laptops, tablets, barcode readers, scanners, external storage devices such as a USB thumb drive, and audio/visual equipment.

c) The purchasing of any technology hardware through use of the campaign credit card requires review and approval by the Foundation BEFORE purchasing. Any hardware or devices whose primary use is not in support of the campaign will automatically be denied.

d) Any technology purchased with a campaign credit card becomes the property of the Marine Toys for Tots Foundation. Upon completion of the campaign the technology MUST be handed over to the Foundation unless approved otherwise by the Foundation for continued campaign support.

6) Data and Information Security

a) During the annual campaign, you will be collecting and storing data and information pertaining to the Marine Toys for Tots Program, Program donors, Program supporters and sponsors, as well as from families and agencies supporting families.

b) The secure handling, storing, and disposal of this information is an important responsibility of each campaign. Individuals and agencies trust Marine Toys for Tots to use the information they provide us, solely for the use intended it is provided for.

c) Campaign related data and information should only be shared with entities directly related to the Marine Toys for Tots Program or the support of the Program and your campaign. An example of an acceptable exchange of data would be passing information to and from an agency or non-profit through which your campaign is distributing gifts.

d) Campaign related data and information should only be stored on devices such as computers, or online accounts such as “cloud” accounts, under ownership and direct control of the campaign or Marine Toys for Tots unless otherwise approved.

e) Any data or information no longer required by the local campaign or Marine Toys for Tots should be properly disposed, returned to the Foundation, or destroyed.

f) Any questions related to the proper handling of Marine Toys for Tots Program or local campaign data should be directed to the Foundation IT Specialist, your Regional Campaign Manager, or VP of Operations for review and instructions.

SECTION XI --- GIK TOYS, HIGH VALUED TOY DONATIONS, AND SERVICE SUPPORT DONATIONS

11.1 Gift-In-Kind (GIK) Toys

a. Gift in Kind Donations to the Foundation:

1) Gift in kind items are toys, books, or other gifts donated to the Foundation, either individually or in large quantities, by individuals or corporations. The Foundation's Marketing & Development team works directly with businesses / corporations to facilitate the donation.

2) Most GIK is shipped directly to Group Sales in Cincinnati, OH. The process from that point is as follows:

(a) Once the shipment arrives at Group Sales, it is properly received, counted, sorted, pallets restacked by age/gender, and stored for follow-on shipping during the campaign season to those campaigns receiving the first supplemental toy shipment.

(b) The pallets of GIK will ship with the supplemental toy orders throughout both first and second waves, i.e., mid-November to mid-December. Coordinators will sign a bill of lading (BOL) to verify delivery.

(c) At the conclusion of the campaign, the Operations Section will input the number of GIK toys and books into the AAR as is currently done with supplemental toys. Coordinators may adjust the numbers to reflect their determination if an item is a toy or a stocking stuffer.

b. Marine Reserve Units and LCO's frequently receive local donations of large quantities of GIK toys, books, or other items from local individuals or businesses. These donors normally request a letter for tax purposes. For a donation to be tax deductible, the individual and/or business must, in an official letter, donate the items to the Foundation. The Foundation, in turn, asks the local unit/LCO to accept these items on its behalf. The process for this is as follows (sample letters may be found in [Appendix H](#) and [Appendix I](#)):

1) The donor forwards a letter to the Foundation or provides it to the Coordinator for forwarding to the Foundation stating that he/she/the company intends to make a contribution of gifts to the Foundation. A list of the items by nomenclature, quantity and value must be included. This letter must be signed and should be sent directly to the Foundation; however, a copy may be delivered to the local Reserve Unit or LCO, which in turn must mail or fax it to the Foundation.

2) The local Reserve Unit or LCO must send a letter to the Foundation stating that it has received a GIK donation. This letter must include the donor's name and address, list the toys by type and quantity, state the date of receipt, and be signed by the Coordinator. **Dollar values are not to be included in this letter. Should the donor provide a letter to the local Coordinator, forward BOTH to the Foundation TOGETHER (Attention: VP, Marketing & Development).**

3) The Foundation will send the donor a letter of thanks and acknowledge the donation for tax purposes.

11.2 Service Support

a. Local companies frequently donate service support (warehouse space, vehicle support, promotional support, etc.) to Toys for Tots Campaigns. Many of these companies desire to take a tax deduction for such support. **It is important to remind these companies to consult with their tax advisor prior to their donation to verify the legality of taking a tax deduction for their support.**

b. Sample letters for arranging tax deductions for donated service support can be found in [Appendix J](#) and [Appendix K](#). This procedure is similar to GIK donation correspondence.

c. Once the Foundation receives a letter from the company donating service support and a letter from the local Toys for Tots Coordinator certifying receipt of the service support, the Foundation sends to the donor a letter of thanks and acknowledgment of the donation for tax purposes.

d. **Letters donating service support should be submitted to the MTFTF as soon as possible, but no later than 30 days after the actual donation.** The MTFTF will send an acknowledgement letter for tax purposes only AFTER the donated service takes place. (i.e., if an organization donates warehouse space for the month of December, the tax letter cannot be sent until after 30 Dec).

11.3 High Value In-Kind Donations

a. W local campaigns receive donated toys that are of significant value, e.g., Sony PlayStations, expensive LEGO sets, vintage toys that are brand new and still “in the box,” and bicycles, etc. they must be appropriately handled.

b. When high-value toy items are received, either through local donations or Foundation provided gift-in-kind (GIK), a Marine or volunteer may think it better to return them to the retailer for the cash value or exchange the item for less expensive toys, sell, auction, post on eBay / Facebook Marketplace / etc., or barter that toy so that the funds can be used to purchase less expensive toys. That may sound good in theory, but it is not authorized and, in many cases, may be against the law. Exchanging in-kind donations for anything of value is not permitted.

c. When a local campaign receives higher-valued donated toys, the items must be distributed the same as any other toy donation; however, the Coordinator should have a system to distribute these items as there are never enough for each child. Here are a few examples of authorized ways to select children and families to receive these toys:

1) Group Home or Large Family: Homes that have many children benefit with items like a video game or a large LEGO set.

2) Raffle: Allow families to pick a ticket during the distribution and then through a drawing, distribute those toys to winning families. **Tickets are not to be sold and only offered to families qualified to receive toys.**

3) Spin-a-Wheel Giveaway: Make a spinning wheel that families spin during distribution and give away the item the wheel landed on.

4) “First come, first served:” If the distribution event will have a lot of families attending to receive toys, Coordinators provide these items to the families that arrive first.

d. It is imperative that we honor the intent of the donor. Coordinators and volunteers are not permitted to sell, exchange, or barter donated toys. They must be distributed to families with children that we serve.

e. See Memorandum titled, “2024 Memo 002” for more information. It will be distributed on Thursday, 1 August 2024, in conjunction with the publishing of the SOP.

SECTION XII --- TAX INFORMATION

12.1 **Tax Deductibility**

Donations and funds raised in the name of Toys for Tots are tax deductible only if forwarded to the Marine Toys for Tots Foundation.

12.2 **Letter for Tax Records**

a. The tax law has been rewritten, effective January 1, 2007, and requires that every donor receive a receipt for his/her donation to a 501(c)(3), not for profit, public charity. It is more important than ever that donations be processed properly, enabling the Foundation to recognize as many donors as possible and be in compliance with the law. Fortunately, the law does not require that a receipt be provided for items donated at unmanned drop off locations.

b. Toy Donations: All Toys for Tots collection containers are considered unmanned. When personnel are present at a donation drop off site, it is typically for a scheduled event and not to manage the collection container itself; therefore, there is no requirement for a receipt, even though there may be Toys for Tots representatives present. **Each toy collection box MUST have the unit name and address affixed.**

c. Monetary Donations: All donations must be forwarded to the Foundation, as previously detailed in [Section VII](#). When the donation is in the form of cash, a receipt will be provided, if requested. Our assumption is that a donor who does not request a receipt does not wish to deduct this donation on his/her income tax return. When the donation is in the form of a check, a receipt will be provided by the Foundation in the form of a thank you/tax letter or post card.

12.3 **Large Quantity Toy/Service Support Donation**

When an individual or company offers to donate a large quantity of toys or service support for which they want an acknowledgement letter for tax purposes, the TFT Coordinator should follow the procedures outlined in [Section XI](#).

12.4 **IRS Federal Identification Number ([Appendix E](#))**

Occasionally, an individual or company will ask for a tax ID number before donating cash, toys, or service support. The processes outlined in [Section XI](#) are designed to handle situations wherein an individual or company donates toys or service support. When an individual or company makes a cash or check donation, a letter for the donor's individual or company tax records will be forwarded as soon as possible. In the event the Federal ID number is required, refer to [Appendix E](#) of this SOP. Should the donor require additional information, contact the Foundation.

12.5 **State Sales and Use Tax Exemptions**

a. The MTFTF is exempt from Federal Taxes. However, we are not exempt from Sales & Use Tax in all states. MTFTF applies for state sales and use tax exemption in states that require an application. Other states require additional paperwork to be completed and signed by an officer of the Foundation and presented to the vendor for each purchase to qualify for state sales tax exemption (this requires close coordination with the Foundation to process correctly). Some states have no sales tax, and others do not grant tax-exempt status. To qualify for tax exempt purchases in the states granting exemption, the credit card or check used to purchase the item(s) must be issued by the Foundation. In the non-exempt states, the Foundation, Reserve Units, and LCO's must pay state sales tax on all Toys for Tots purchases.

b. Always have your Sales & Use Tax Exemption Certificate on hand when making a purchase. In the absence of a Sales & Use Tax Exemption Certificate, you must always pay tax. Contact your Regional Campaign Manager for more information.

c. A buyer providing an Exemption Certificate is claiming the sale is not taxable and relates to the mission of the organization. If the claim is found to be improper, the state will investigate the Foundation and the individual who made the purchase.

SECTION XIII --- SUPPORT AND PROMOTIONAL MATERIAL

13.1 Support/Promotional Material

Starting in August, campaigns receive support and promotional material from the Foundation. The items and quantities forwarded are based on the total amount of material used in the previous campaign. Orders for support and promotional material are initiated by the Foundation in February, for delivery to campaign sites and the Foundation warehouse. Each unit will receive a shipment based upon the size of the local campaign dependent on the response on the Promotional Materials and Toy Collection Boxes Standard Package Order Sheet found on the Secure Section. Requests for additional materials may be submitted via the Special Order form found on the Secure Section #9 Marketing and Promotional materials.

13.2 Support/Promotional Material Budget

The budget for support/promotional materials has increased exponentially throughout the years. Each item provided is already specially packaged (usually 100 per package). To further break down items for shipment to units/organizations is time consuming and not practical. Each campaign Coordinator must fill out the Promotional Materials and Toy Collection Boxes Standard Package Order Sheet form that indicates if they wish to receive the standard package of promotional materials each year.

13.3 Promotional Items Available:

a. The Standard and/or Special-Order Items:

1) **Collection Boxes – Standard:** Collapsible, corrugated cardboard to place at collection sites. Additional boxes can be ordered after October 15. **If additional boxes are required, fill out the Special Order Form on the Secure Section).** Initial issue, unless otherwise requested: Small Campaigns – 60 boxes; Medium Campaigns – 150 boxes; Large Campaigns – 300 boxes; Extra Large Campaigns – 500 boxes.

2) **Auto Flags (11” X 15”) – Special Order:** White with red train logo. It has a mounting bracket for car windows and can be used for vehicles when picking up toys or participating in a parade.

3) **Banners on a Roll (50 per roll) – Standard:** For use at outdoor events and for placing on a wall to draw attention to a special function.

4) **Bumper Stickers – Special Order:** Give-away items. They may be placed on children’s notebooks or bulletin boards, as well as automobiles.

5) **Business Cards** – **Special Order**: Add a touch of professionalism to your campaign. These cards may be ordered directly from one of the Foundation’s local business partners. Order form is located on the Secure Section, # 5

6) **Car Magnets (8” x 24”)** – **Special Order**: Magnets to aid in the identification of volunteers when picking up toys from drop sites. This item is durable and expensive. Please store properly for use in subsequent campaigns.

7) **Certificates of Appreciation** – **Special Order**: An inexpensive certificate to be used for presentations (i.e., thanking a grade school class). An electronic version is now available on the Secure Section.

8) **Coloring Books** – **Standard**: Six different Toys for Tots logo’ed books with different subject matter.

9) **Commander’s Award** – **Special Order**: More formal certificates with the MFR Commander’s signature. They should be used to thank very special individual and business supporters.

10) **Embroidered Patch** – **Special Order**: For volunteers to put onto a coat or vest or as items given to the public. Aids in identifying supporters of Toys for Tots.

11) **Ink Pens** – **Standard**: Use as give-away items at important functions or as a thank you to supporters.

12) **Iwo Jima Gold Foil Etching** – **Special Order**: This item is provided by the Foundation in limited quantities. These etchings, when matted and framed, make excellent awards.

13) **Lanyards** – **Special Order**: For your volunteers to use around the warehouse and to show when they are picking up toys from the collection points.

14) **Lapel Pins** – **Special Order**: Train-shaped pin on to keep Toys for Tots in the thoughts of all our supporters, year-round!

15) **Letter Head (Stationary) / Letter Head (Envelopes)** – **Special Order**: To write to sponsors or thank you letters to your support

16) **Medium Poster** – **Standard**: This poster should go on toy collection receptacles, in business windows, and in any other public areas in which a great deal of foot traffic is experienced so that toy donations may be generated. There are not sufficient quantities to give posters to individuals. It may also be framed and used as a gift to special supporters.

17) **Pencils** – **Standard**: Use as give-away items at important functions as a thank you to supporters.

18) **Plastic Cups** – **Standard**: Cups that can be used to hold promotional items at events. They should not be used at events if there is alcohol being served, i.e., a bar or party where Toys for Tots is the beneficiary.

19) **Pre-Paid Envelopes** – **Special Order**: To send receipts and Verifications to the Foundation.

20) **Refrigerator Magnets** – **Special Order**: Train-shaped magnets to keep Toys for Tots in the thoughts of all our supporters, year-round!

21) **Rubber Wrist Bands** – **Standard**: Similar to friendship bracelets. Demonstrates support of Toys for Tots.

22) **Small Toys for Tots Bags** – **Standard**: Little bags are used to put your promotional items in at Toys for Tots Events to give to supporters.

23) **Static Window Clings (12" X 24")** – **Special Order**: A plastic Toys for Tots sign suitable for placement in a store window or car window to aid in identifying local drop sites and sponsors.

24) **Thank You Postcards** – **Special Order**: Demonstrates support of Toys for Tots.

25) **Toys for Tots Train Logo Stickers** – **Standard**: Demonstrates support of Toys for Tots.

26) **Toys for Tots Train Logo Train Cutouts** – **Special Order**: Small, heavy-stock paper train cut out for use with local businesses to raise funds for Toys for Tots. Each cutout has bar codes for \$1, \$5, and \$10 donations, and may be filled out with the patron's name and posted on a window/wall where purchased.

27) **Trifold Brochures** – **Standard**: The trifold business brochure can be given to business representatives and potential large contributors who might be interested in knowing how to support Toys for Tots locally or nationally.

28) **Vinyl Banners** – **Special Order**: A durable, but expensive banner. Please store properly. New Units have Priority.

13.4 **Items Available to Recognize Community Support**

There are many conscientious members in every community in the United States that support Toys for Tots. To ensure their continued support, recognition from the U.S. Marine Corps Reserve Toys for Tots Program is encouraged. To support you in this effort, several options are available for your consideration. Refer to [Section 8.6.d](#).

SECTION XIV --- PUBLIC RELATIONS

14.1 **Media Relations**

This Section was reserved for appropriate media items such as Public Service Announcements, sample speeches, etc. The Marketing & Development Team produced a thorough Marketing Guide to help coordinators interact with the media. See the Marketing Guide on the Secure Section at <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/documents/TFT%20Marketing%20Guide%20for%20Coordinators.pdf>. The Marketing Guide will also be produced “hard copy” and forwarded to all Coordinators each September.

SECTION XV --- TOYS FOR TOTS SAFETY PROGRAM

15.1 **Safety Awareness**

All personnel involved in Toys for Tots (TFT) activities will be safety conscious always. Basic references for safety issues are Marine Corps Order 5100.29F, and the Occupational Safety and Health Administration (OSHA) standards contained in Public Law 91-596, and 29 CFR 1960.

15.2 **Facilities**

a. TFT activities will be conducted only in facilities (workspaces, warehouses, office spaces, grounds and buildings) that permit safe activities.

1) TFT facilities must be clear of debris, trash, loose boards, boards with exposed nails/screws, flammable materials, hazardous materials of any type, improperly installed/jury rigged electrical equipment and any other obstacle to safe activities.

2) Under no circumstances will TFT activities be conducted in unsafe facilities.

15.3 **Procedures**

a. TFT Coordinators will review and be familiar with the safety procedures and safety measures set forth in this Section and the procedures for the facilities being used for TFT activities at the beginning of each campaign.

1) Coordinators will ensure that volunteers are briefed on safety procedures and comply therewith.

2) Coordinators will inspect his/her facilities at the beginning of each campaign using the Safety Checklist at [Appendix L](#) and take corrective actions regarding any improper safety conditions discovered.

3) The safety checklist is not all-inclusive but is sufficient to be used as a guide for the basic elements of local safety plans/programs and procedures for each area of a local campaign's facilities. Upon discovering a hazard of any type, the Coordinator must check the "Needs Work" category and write down the work needed and the location of the item for a corrective action plan. Action to correct a safety hazard should be taken immediately.

15.4 **Gratuitous Service / Hold Harmless Agreement**

Each TFT volunteer must sign a "Gratuitous Service Agreement" (all Marine sites) or Hold Harmless Agreement (all LCO sites) before participating in TFT activities. This agreement will be maintained on file with the local campaign. Gratuitous Service Agreements are valid for only one TFT campaign. The Gratuitous Service and Hold Harmless agreements may be found at [Appendix B](#) and [Appendix C](#) or in the Secure Section of the local website (see <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/volunteer-agreements/>). Keep

a copy of the agreement at local site for 2 years. LCO Coordinators must sign the Hold Harmless Agreement and submit to their Regional Campaign Manager annually.

APPENDICES

- A TFT Coordinator Acknowledgement of Responsibilities (USMC ONLY)
- B Gratuitous Service Agreements (USMC Only)
- C Hold Harmless Agreement
- D Program Checklists
- E IRS Letter - Marine Toys for Tots Foundation Federal ID #
- F HOLD FOR FUTURE USE
- G Guidance Addressing Improper/Illegal Use of Toys for Tots Name/Logo
- H Sample Letter (notification of toy donation from local business)
- I Sample Letter (acknowledgment of toy donation)
- J Sample Letter (notification of service support from local business)
- K Sample Letter (acknowledgment of service support donation)
- L Safety Checklist
- M MTFTF Purchase Card Agreement
- N Mobilization Contingency Plan
- O Purchasing Process
- P Donated Toys Valuation Project
- Q After Action Report/Directions
- R Volunteer Service Verification Form
- S Blank Certificate of Liability Insurance (COI)
- T Photo Release Authorization (for adults and for children)



Acknowledgement of Responsibilities

Marine Corps Reserve Toys for Tots Program Marine Forces Reserve (MFR) Unit Campaign Coordinator

Date: _____

Coordinator Rank / Name: _____

Unit Name: _____

The annual Marine Corps Reserve Toys for Tots campaign is the Marine Corps' premier community outreach program. Since 1947, Marine Corps personnel, both in the Reserve and Active Components, have positively touched the lives of millions of less fortunate children assisting them in becoming responsible, productive, patriotic citizens. As stated in ForO 5000-24.2, Enclosure (1), Chapter 1, Section 1.h.,

"In keeping with the Commander's intent, Commanding Officers (Cos) / Inspector – Instructors (I-Is) will select the "right" individual to be the Coordinator; someone who has exceptional planning, coordinating, managing, and supervising skills and will be actively engaged throughout the planning and execution phases of the Program. Due to complex coordination and managerial requirements, recommend E-5s (active duty, AR or SMCR) and above to be appointed as unit Coordinators. When a new Coordinator is appointed, the CO / I-I will ensure a proper turnover takes place between the new Coordinator and the previous Coordinator when feasible. To maintain continuity, the new coordinator should have served as the assistant coordinator during the previous campaign if at all possible."

The Marine or Sailor agrees to:

1. Comply with the provisions of MCO 5726.14F, US MARINE CORPS RESERVE TOYS FOR TOTS PROGRAM; the Marine Forces Reserve ForO 5000-24.2, POLICY FOR THE CONDUCT OF THE ANNUAL MARINE CORPS RESERVE TFT PROGRAM; and the Standard Operating Procedures (SOP) for Local Toys for Tots Campaigns.
2. Deposit all cash donations into the national cash deposit account at Financial Institution (if branch is located in campaign area).

3. Forward all donations and funds to the Marine Toys for Tots Foundation within five (5) working days of receipt.
4. Submit itemized receipts via the online Secure Site within five (5) business days after the transaction posts to the Logbook. Itemized receipts must be submitted NLT the 9th day of the month following when the transaction posted.
5. Complete the annual campaign After Action Report (AAR) and submit no later than 16 January 2025 after the campaign.
6. Complete all purchases using the Financial Institution Purchase Card. Pay particular attention and read Section 6.25 of Reference (d) and Reference (e) concerning the Foundation's reimbursement policy. Use of personal credit cards or personal funds is not authorized to conduct Toys for Tots business. **If you or one of your Marines, Sailors, and/or volunteers makes a conscious decision to use their personal credit card, the Foundation WILL NOT reimburse the Coordinator.** Exceptions to this policy will only be granted at the Vice President, Operations level.
7. Maintain communications with the Foundation from when assigned as the campaign coordinator until all administrative requirements have been completed, i.e. AAR, Verification Requests (VRs) with supporting receipts, etc. Contact your appropriate Regional Campaign Manager to verify that you do not have any outstanding administrative paperwork.
8. Carry out the purpose of the Toys for Tots program by providing toys for economically disadvantaged children at Christmas.
9. Coordinator has, at a minimum, a current SECRET security clearance. The reason for this is not due to the coordinator having access to classified material, it is to satisfy the requirement that every campaign coordinator must have a background investigation.

Coordinator's Rank / Name: _____

Coordinator's Signature: _____

Commanding Officer (CO) or
Inspector – Instructors (I-I)
Rank / Name: _____

Commanding Officer (CO) or
Inspector – Instructors (I-I)
Signature: _____





**MARINE CORPS RESERVE TOYS FOR TOTS PROGRAM
GRATUITOUS SERVICE AGREEMENT
(USMC Sites ONLY)**

I, _____, by signing this Agreement, agree to provide gratuitous
(Name of Volunteer)

and/or volunteer services as a Toys for Tots volunteer for _____,
(Marine Unit and/or Command)

in compliance with 10 U.S.C. §1588. I agree to provide such services without expectation of compensation. I further understand that such gratuitous service does not constitute Government service for purposes of Federal retirement benefits or preference in hiring for paid Federal employment positions. Any reimbursement for incidental expenses shall be subject to the availability of funds and the discretion of the commanding officer/coordinator of

_____ and the Marine Toys for Tots Foundation.
(Name of Marine Unit and/or Command)

In compliance with 10 U.S.C. §1588(a)(3)(A), the nature of my service will be to provide volunteer services for the Toys for Tots Program. I understand that as a Toys for Tots volunteer, I will not be considered a Federal employee for any purpose other than the Federal Tort Claims Act (28 U.S.C. §§1346(b), 2671, 2672, and 2674-2680) and the Military Claims Act (10 U.S.C. §§ 2731-2738). I may also be entitled to compensation under the Federal Employees' Compensation Act (5 U.S.C. §§ 8101-8193), should I suffer any personal injuries in the performance of my volunteer services for the Toys for Tots Program.

I understand that as a Toys for Tots volunteer, any personal information provided to me during my volunteer services is, and will be, protected from release to any individual by the Privacy Act of 1974. I agree to hold myself to the highest standards of confidentiality in this regard. I further understand that any issues pertaining to military members, their families, donors, or recipients of Toys for Tots items will be discussed ONLY with those individuals with a "need to know."

This document encompasses all understandings between myself and

_____ as it pertains to my volunteer services for the Toys for Tots Program.
(Marine Unit and/or Command)

Volunteer Signature/Date: _____

Coordinator Signature/Date: _____



Waiver, Release and Hold Harmless Agreement

In consideration of permission granted by the **Marine Toys for Tots Foundation ("Foundation")** allowing me to participate as a **Toys for Tots Volunteer** during the _____ **Marine Corps Reserve Toys for Tots Program National Campaign (the "Activity")**, which will occur from **1 January** _____ **through 30 March** _____.

I (together with my parent or guardian, if I am under a legal disability or am under the age of eighteen (18)) represent and agree, on behalf of myself and my heirs, successors, assigns, and any other person claiming by, under or through me, as follows:

1. I acknowledge that participating in the Activity involves certain risks, some of which I may not fully appreciate, and that injury, death, property damage or other loss or harm could occur to me or others. I accept and voluntarily incur all risks of any injury, damage, loss or harm to me which arises during or results from my participation in the Activity, including any associated travel, and regardless of whether or not caused in whole or in part by the negligence, action, omission and/or other fault of the United States Marine Corps and/or the Foundation, the Foundation's Board of Directors, Officers, employees, agents or insurers ("Released Parties").
2. I acknowledge that should I operate my personal vehicle while participating in any Activity on behalf of the United States Marine Corps and/or the Foundation, it is my duty to have a current personal auto insurance policy which must provide for bodily injury liability, property damage liability, as well as physical damage liability. I acknowledge and understand that my personal auto insurance policy is primary & non-contributory. I accept and incur all risks of any bodily injury or property damage liability, personal injury, and/or property damage that may occur to my personal vehicle as result of the use while participating in any Activity.
3. I expressly hold harmless the Released Parties from all losses, liabilities, damages, costs or expenses (including but not limited to reasonable attorneys' fees and other litigation costs and expenses) incurred by any of the Released Parties as a result of any claims or suits that I (or anyone claiming by, under or through me) may bring against any of the Released Parties to recover any losses, liabilities, damages, costs or expenses that arise during or result from the operation of my personal vehicle while participating in the Activity, regardless of whether or not caused in whole or part by the negligence, action, omissions and/or other fault of any of the Released Parties.
4. Prior to participating in any Marine Toys for Tots Activity, I affirm that within the past fourteen (14) days, I have not been diagnosed with, demonstrated any symptoms of, nor have I been exposed to any communicable diseases, including but not limited to the virus commonly referred to as "COVID-19." I also acknowledge that by entering any Marine Toys for Tots premises and/or participating in any Marine Toys for Tots Activity that there are risks to me and to those with whom I interact of exposure, directly or indirectly, to communicable disease(s) including, but not limited to, the virus "severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2)", "COVID-19" and/or any mutation or variation thereof.
5. I also waive all claims against any of the Released Parties for any injury, damage, loss or harm to me, whether known and unknown, which arises during or results from my participation in the Activity, regardless of whether or not caused in whole or part by the negligence, action, omission and/or other fault of any of the Released Parties. I release and forever discharge the Released Parties from all such claims.

6. I further agree to indemnify and hold the Released Parties harmless from all losses, liabilities, damages, costs or expenses (including but not limited to reasonable attorneys' fees and other litigation costs and expenses) incurred by any of the Released Parties as a result of any claims or suits that I (or anyone claiming by, under or through me) may bring against any of the Released Parties to recover any losses, liabilities, damages, costs or expenses that arise during or result from my participation in the Activity, regardless of whether or not caused in whole or part by the negligence, action, omissions and/or other fault of any of the Released Parties.

7. I have carefully read and reviewed this Waiver, Release and Hold Harmless Agreement. I understand it fully and I execute it voluntarily.

EXECUTED this _____ day of _____, 20_____ .

Volunteer
Signature: _____

Volunteer
Name: _____

Parent or
Guardian
Signature
(if applicable): _____

Parent or
Guardian
Name (if
applicable): _____

Volunteer / Parent or Guardian Email Address

Volunteer / Parent or Guardian Phone Number

Emergency Contact Name

Relationship to Volunteer

Emergency Contact Email Address

Emergency Contact Phone Number

Emergency Contact Address

Campaign Timeline Checklist

<u>Month</u>	<u>Task</u>	<u>Expectation</u>	<u>Reference</u>	<u>Date for Action</u>	<u>Assigned to</u>	<u>Date Accomplished</u>
<u>January</u>	After Action Report	Complete AAR by the 15th	Local Website	NLT 1/15		
	Closeout	All bills paid, and paperwork submitted	Regional Campaign Manager			
	Recognition /Thank you	ID / Recognize all major donors and volunteers. Request approval to conduct an end-of-campaign event that is cost effective. This includes adhering to the purchasing guidelines for all purchases relevant to the event.	SOP - Section 8.6.d. – Regional Campaign Manager/ Financial Report			
	Turnover folder	Previous years’ information to include: copies of receipts for all toy purchases, accounting of toy inventory (carryover from previous campaign), copies of correspondence to /from MFR and MTFTF. Lists of key civilian volunteers and advisors, media contacts, business supporters, social service agencies, church groups, and other local organizations that assisted and their contact information.				

<u>Month</u>	<u>Task</u>	<u>Expectation</u>	<u>Reference</u>	<u>Date for Action</u>	<u>Assigned to</u>	<u>Date Accomplished</u>
<u>February</u>	Assign Coordinator	June 30 – Deadline to apply to be an LCO coordinator	Section 2.6	June 30 last day to apply to run a campaign for current year		
	Assign Assistant Coordinator	Coordinator “understudy” - to assume duties as Coordinator in their absence (as soon as possible after Coordinator assigned).				
	Application	Assign Coordinator for current campaign and complete application & background check	www.toysfortots.org - click on About Toys for Tots, click on Coordinator's Corner, click on Application	Available January 15 – June 30		
<u>March / April / May</u>	Preparation Period	Organization / Planning Meetings - Include local sponsors, supporters, and volunteers - Review recurring events - results of previous campaign - (Good / Bad / Keep / Modify / Drop)	SOP- Section VI & Turnover folder			
<u>June / July</u>		LOI (Letter of Instruction) & Planning are keys to success.	SOP- Section VI			
	Organizational Meeting	Organizational Meeting - Form committees / teams and develop a plan of action.	Presentation available on local website			

<u>Month</u>	<u>Task</u>	<u>Expectation</u>	<u>Reference</u>	<u>Date for Action</u>	<u>Assigned to</u>	<u>Date Accomplished</u>
	Logistics Team	Manages volunteer support and supplies such as: ID's, shirts, hats (purchasing guidelines in the SOP). Oversees drop locations, schedules, transportation, insurance, and vehicle requirements	Presentation available on local website - SOP Section VIII and Section 6-21			
	Operations Team	Ensure that staff members are knowledgeable. Provide a map of the area and a binder containing pick-up, schedules, dates and times of upcoming events, a list of drop-off sites and a list of local contacts include staff names& contact phone #'s. Include support agencies contact info & phone #'s.	SOP / Secure Section			
	Media Team	Maintains schedule of events, assigns support staff, and responds to local inquiries (from the media and / or sponsors) reviews all radio, television, and newspaper schedules, interviews, & appearances	Presentation available on local website - Media Guide- SOP/ Local Website			
	Donor Team	Seeks out campaign support to be donated, does grant application, utilizes 501 (c) 3				

<u>Month</u>	<u>Task</u>	<u>Expectation</u>	<u>Reference</u>	<u>Date for Action</u>	<u>Assigned to</u>	<u>Date Accomplished</u>
	Warehouse Team	Organize teams to accept, sort, and distribute toys. - Become familiar with the warehouse safety checklist				
	Annual TFT Training	Coordinator RSVP for the annual training - only one (1) representative per site - Purchase airline ticket (if flying) according to LOI	Regional Campaign Manager	NLT 8/1		
	Acknowledgement of Responsibility	Marine Reserve Sites only	Appendix A - Local website/ Regional Campaign Manager	NLT 8/31		
	Promotional Material Shipping address	Accurate promotional material shipping address to Foundation- must be able to accept cases / pallet of boxes (Small – 45 boxes; Medium – 105 boxes; Large – 225 boxes; Extra Large – 300 boxes)		NLT 7/15		
<u>August</u>	SOP	Read updated version	Local website			
<u>September</u>	Promotional Materials	Promotional materials shipped / to each site directly from the vendor - review uses for each item - New units receive after attendance at annual training	Section XIII			
	Annual TFT Training	To introduce, review, train, and discuss preparations for the upcoming TFT Campaign				

<u>Month</u>	<u>Task</u>	<u>Expectation</u>	<u>Reference</u>	<u>Date for Action</u>	<u>Assigned to</u>	<u>Date Accomplished</u>
	Coordinate w/ adjacent coordinators	Maintain communication w/other units- ensures maximum coverage of area without overlap	Annual training / County list provided by Regional Campaign Manager			
	Inventory	Verify Toy Inventory from previous campaign to ensure accuracy and condition	SOP Section VI - Previous AAR/ local website			
	Registration	Dates, Location, Requirements available on local website		To public by October 1		
	Fund Handling	Donation (cash/ checks/ money orders) send in at least weekly via overnight delivery directly to Des Moines, IA addressed labels. Follow deposit guidelines	SOP Section VII - Local website	Weekly		
<u>October</u>	Execution Phase Begins	National Kick-off October 1				
	Warehouse/ Distribution Site	Safety Checklist completion- Layout planning				

<u>Month</u>	<u>Task</u>	<u>Expectation</u>	<u>Reference</u>	<u>Date for Action</u>	<u>Assigned to</u>	<u>Date Accomplished</u>
	Collection Box Distribution	All collection boxes must have contact information on them- Toys for Tots (ID's charity) Organizations Name (Local unit/POC) Address/City, State/Zip (Local Unit/Org info) Every TFT collection site is UNMANNED drop site (does NOT require a receipt.) Local coordinator CANNOT issue tax receipts	SOP	Dates of drop off/collection/ final collection listed on local website		
	Warehouse Addresses	Provide address to Foundation via Secure Section form for large donation to include availability of: forklift, pallet jack, dock, manpower, and total square footage		NLT 10/15		
	Registration	Dates, Location, Requirements available on local website	Local website	10/1		
<u>November / December</u>	Toy Valuation Project	VP Ops will contact to advise local Coordinators of the selection of his/her site to be visited by a data collection representative. Coordinate w/ the rep to ensure sufficient samples are viewed, photographed from the site. Information will be included in the Foundation's annual audit.	Section 6.13			

<u>Month</u>	<u>Task</u>	<u>Expectation</u>	<u>Reference</u>	<u>Date for Action</u>	<u>Assigned to</u>	<u>Date Accomplished</u>
	Registration	Emergency sign up dates and locations available on local website				
	1st Supplemental toys delivery	Qualified campaigns receive the first shipment based on: inventory and funds in account. Take inventory of shipments-ensure packing list and contents match. The Foundation will enter this number on your AAR	Third week of November			
	Shopping	Purchase Guidelines	Section 8 - Online financial report fund availability			
	Second supplemental toy request	On an as needed basis - if media has been contacted, registration is closed, and funds are depleted	Local website-Regional Campaign Manager/VP Ops	No earlier than 12/1		
	Distribution	Complete distribution of toys on or before December 24		NLT 12/24		
	Final collection box pick-up			Site determination		

<u>Month</u>	<u>Task</u>	<u>Expectation</u>	<u>Reference</u>	<u>Date for Action</u>	<u>Assigned to</u>	<u>Date Accomplished</u>
<u>Event Planning</u>	Event planning tips	Large events up to 1 year out / smaller 3-6 months - type of event, location, date & time, # of participants/ teams (expected/ desired), permits (city/county/usage/ licensing), support requirements, and details	Secure Section Event Approval Form (https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/forms/event-approval.aspx)			
	Organizational Guide	<ul style="list-style-type: none"> • WHO – Contact (TFT & Event organizing/content) • WHAT – type of event • WHEN – Date / time • WHERE – Site • HOW - Ideas to improve • Local Support (Logistics) – transportation, food, toilets, tent, booth, advertising - Insurance (liability), Personal conduct (TFT personnel & attendees), additional business support, security (depending on type of event & size), # of people attending, escorts (if needed), and periodic checks/ onsite 				

<u>Month</u>	<u>Task</u>	<u>Expectation</u>	<u>Reference</u>	<u>Date for Action</u>	<u>Assigned to</u>	<u>Date Accomplished</u>
	Public Relation	TV/Radio/News Papers – Contact EARLY!!! (once ads run – attendance climbs) - Your Website – tool to advertise local campaign / post even	Media Guide- SOP/Local Website			

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **APR 18 2006**

MARINE TOYS FOR TOTS FOUNDATION
C/O MATTHEW T COOPER
PO BOX 1947
QUANTICO, VA 22134

Employer Identification Number:
20-3021444
DLN:
17053182015025
Contact Person:
LYNN HALL ID# 75092
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
DECEMBER 31
Public Charity Status:
170(B)(1)(A)(VI)
Form 990 Required:
YES
Effective Date of Exemption:
MAY 26, 2005
Contribution Deductibility:
YES
Advance Ruling Ending Date:
DECEMBER 31, 2009

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. During your advance ruling period, you will be treated as a public charity. Your advance ruling period begins with the effective date of your exemption and ends with advance ruling ending date shown in the heading of the letter.

Shortly before the end of your advance ruling period, we will send you Form 8734, Support Schedule for Advance Ruling Period. You will have 90 days after the end of your advance ruling period to return the completed form. We will then notify you, in writing, about your public charity status.

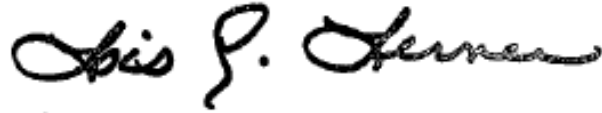
Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Letter 1045 (DO/CG)

MARINE TOYS FOR TOTS FOUNDATION

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,



Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)
Statute Extension

Letter 1045 (DO/CG)

HOLD FOR FUTURE USE

MARINE TOYS FOR TOTS FOUNDATION GUIDANCE FOR ADDRESSING THE IMPROPER OR ILLEGAL USE OF THE TOYS FOR TOTS NAME/LOGO

1. Upon learning that an individual or organization is using the Toys for Tots name/logo without prior approval from a local TFT Campaign Coordinator (Marine Reserve Unit or LCO), Marine Forces Reserve, or MTFTF, the following actions should be taken:

a. Seek information about the individual or organization misusing the name/logo and determine their intentions. In many cases, the individual or organization does not realize what they are doing is illegal. Get as much information as you can about the individual or organization, i.e., name of organization, point of contact name, address, email address, phone number, etc.

b. Inform the Foundation.

c. Provide the organization a letter based off the template on the next page (sent via email preferably copying the appropriate Regional Campaign Manager and the Vice President, Operations at the Foundation).

d. If the individual or organization represents a cause that will reflect positively on both the Toys for Tots Program and the U.S. Marine Corps, request they support your program or apply for authorization to conduct a local community campaign (if outside your campaign's area of responsibility, i.e., 40-50 miles is a good distance estimate).

e. Should the individual or organization not wish to support the U.S. Marine Corps Reserve Toys for Tots Program, or fail to meet accepted standards, or if the local unit prefers not to have them support the local program, the TFT Coordinator should refer them to the Foundation.

f. Most people will participate with the unit or stop at this point, but should they continue to operate outside the law, notify the Foundation, in writing, of all details, including attempts to reach the individual or organization.

g. At this point, the Vice President, Operations will write a letter to the individual or organization and also contact local authorities.

2. It is imperative that each case be documented in its entirety so that proper legal action may be taken. Without documentation, unauthorized acts will continue to occur.

3. REMEMBER, YOUR ACTIONS REPRESENT THE MARINE CORPS. YOU MUST TAKE THE MORAL HIGH GROUND AND NOT GET ANGRY OR EMOTIONAL WITH THE INDIVIDUAL OR ORGANIZATION. LET THE FOUNDATION DO THAT YOU REMAIN A PILLAR IN YOUR COMMUNITY AND YOUR ACTIONS WILL NOT REFLECT POORLY ON YOU, THE PROGRAM, OR THE MARINE CORPS.

MARINE TOYS FOR TOTS FOUNDATION GUIDANCE FOR ADDRESSING THE IMPROPER OR ILLEGAL USE OF THE TOYS FOR TOTS NAME/LOGO

[DATE]

[INDIVIDUAL NAME OR ORGANIZATION]

[ATTN: POINT OF CONTACT]

[ADDRESS LINE 1]

[ADDRESS LINE 2]

[CITY, STATE ZIP CODE]

[PHONE NUMBER]

NAME OF INDIVIDUAL OR ORGANIZATION POINT OF CONTACT NAME],

It has been brought to my attention that [ORGANIZATION NAME] is conducting a toy collection campaign using the Toys for Tots name and/or logo without the authorization of any official associated with the U.S. Marine Corps Reserve Toys for Tots Program. Acting in this manner, and in an area that is covered by an authorized Toys for Tots campaign, confuses the public into believing they are supporting the U.S. Marine Corps Reserve Toys for Tots Program, when, in fact, they are not.

The Toys for Tots name and logo have been duly registered with the U.S. Patent and Trademark Office of the U.S. Department of Commerce (Name - Reg. No. 1,680,712; Logo – Reg. No. 1,929,756). Accordingly, no individual or organization may use either the Toys for Tots name or logo without the authorization of an approved local coordinator of this program or by a representative of the Marine Toys for Tots Foundation. Your organization has no such authorization.

Helping less fortunate children during the Christmas season is a wonderful endeavor. I hope that you will work with the local Toys for Tots campaign in [LOCAL TOYS FOR TOTS CAMPAIGN LOCATION]. The local Marine Toys for Tots Program Coordinator is [NAME] and I can be contacted at [EMAIL] and [PHONE NUMBER]. Working with me and the Marines and volunteers of our local campaign will benefit numerous less fortunate children this Christmas season. Should your organization not wish to work with the U.S. Marine Corps Reserve Toys for Tots Program, you must operate using your own name and register with the appropriate state agencies to conduct a charitable endeavor. Continuing to operate using our name and/or logo directly violates U.S. copyright laws and misleads the public.

Should any questions arise, please contact me via email or phone.

Respectfully,

[LOCAL COORDINATOR NAME]

SAMPLE ONLY

Microsoft Word Template found on the Secure Section here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/gift-in-kind/>

LETTER OF DONATION NOTIFICATION

**THE WIDGET COMPANY
COMPANY LETTERHEAD**

Current Date

Vice President, Marketing & Development
Marine Toys for Tots Foundation
18251 Quantico Gateway Drive
Triangle, VA. 22172

To Whom It May Concern:

Re: Donation of Gifts

The Widget Company donated the following items to the Marine Toys for Tots Foundation

<u>ITEM</u>	<u>QUANTITY</u>	<u>VALUE</u>	<u>TOTAL VALUE</u>
Toy Truck	500	\$10.00	\$5,000.00
Footballs	500	\$15.00	<u>\$7,500.00</u>
Total			\$12,500.00

John J. Doe (Signature)
Vice President

SAMPLE ONLY

SAMPLE ONLY

Microsoft Word Template found on the Secure Section here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/gift-in-kind/>

LETTER ACKNOWLEDGING DONATION OF TOYS

Unit/Local Community Org Heading/Address

Current Date

From: Toys for Tots Coordinator
To: Vice President, Marketing & Development
Marine Toys for Tots Foundation
18251 Quantico Gateway Drive
Triangle, VA 22172

Subj: Donation of Toys

1. The following Gift in Kind toy donation to the Marine Toys for Tots Foundation by _____ was received on _____ :

ITEM	QUANTITY
Toy Trucks	500
Footballs	500
Total	1,000

Typed Name and Grade
I & I

SAMPLE ONLY

SAMPLE ONLY

Microsoft Word Template found on the Secure Section here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/gift-in-kind/>

LETTER OF SERVICE SUPPORT NOTIFICATION

COMPANY LETTERHEAD

Current Date

Vice President, Marketing & Development
Marine Toys for Tots Foundation
18251 Quantico Gateway Drive
Triangle, VA. 22172

To Whom It May Concern:

Re: Donation of Service Support

The Northwestern Telephone Company donated the following service support to the Marine Toys for Tots Foundation:

Three cellular phones with full service for 3 months from Oct 1 - Dec 25, 20__.

The value of this service support is \$250.00.

One free telephone line for 3 months from Oct 1 - Dec 25, 20__. The value of this service support is \$100.00.

Hauling service to pick up and transport toys for 3 months from Oct 1 -Dec 25, 20__. The value of this service support is \$2500.00 (includes vehicles, gas, and drivers).

Warehouse space to store and sort toys for 3 months from Oct 1 - Dec 25, 20__. The value of this service support is \$2000.00 (included 1000 square feet of warehouse space @ \$8.00 per square foot per year).

Six billboard (10' x 20') of advertisement for 3 months from Oct 1 - Dec 25, 20__. The value of this service support is \$1,500.00.

Ads on 5 company trucks/vans for 3 months from Oct 1 - December 25, 20__. The value of this service support is \$1,000.

Sincerely,

John J. Doe
Vice President

SAMPLE ONLY

SAMPLE ONLY

Microsoft Word Template found on the Secure Section here: <https://lco-admin.toysfortots.org/local-coordinator-sites/lco-admin/secure-site/gift-in-kind/>

LETTER ACKNOWLEDGING SERVICE SUPPORT

Unit/Local Community Org Heading/Address

Current Date

From: Toys for Tots Coordinator
To: Vice President, Marketing & Development
Marine Toys for Tots Foundation
18251 Quantico Gateway Drive
Triangle, VA 22172

Subj: Donation of Service Support

The following service support was received:

Three cellular phones with full service for 3 months from Oct 1 - Dec 25, 20__.

One free telephone line for 3 months from Oct 1 - Dec 25, 20__.

Hauling service to pick up and transport toys for 3 months from Oct 1 -Dec 25, 20__.

Warehouse space to store and sort toys for 3 months from Oct 1 - Dec 25, 20__.

Six billboard (10' x 20') of advertisement for 3 months from Oct 1 - Dec 25, 20__.

Ads on 5 company trucks/vans for 3 months from Oct 1 - December 25, 20__.

This service was provided by _____.
Company Name

Typed Name and Grade
I & I/Toys for Tots Coordinator

SAMPLE ONLY



Safety Checklist

<u>Health Emergency Preparation</u>	<u>Good</u>	<u>Needs Work</u>
--	--------------------	--------------------------

Coordinator/volunteers have been trained to respond to health emergencies; or instructions are posted.

Emergency telephone numbers are posted (911/fire/ambulance)

First aid supplies and instructions are provided; Coordinator/volunteers know where to find them. Supplies suitable for injuries likely to occur in this area.

Fire Emergency Preparation

Good

Needs Work

Fire extinguishers are easily accessible and have been checked and serviced as necessary. Fire extinguishers are the appropriate type.

Fire exits accessible and unlocked from the inside. The path to fire exits is clear and free of obstacles. There is access to two fire exits from every point in the building.

Emergency escape routes are prominently posted.

Smoke detectors are installed. Batteries were tested.

Fire Prevention

Good

Needs Work

Flammable materials are safely stored in proper containers away from sources of heat and sparks and clearly labeled.

Anything that makes flames or sparks is shielded, and the area is clear of trash, papers, and other potential fuel.

Housekeeping

Good

Needs Work

Work areas are clean and orderly to prevent hidden hazards.

Floors, aisles, stairs, and entryways provide good traction and are free of cracks, bumps, and other hazards that could cause trips or falls.

Cleanup materials are provided for water, grease, or other materials that could create slippery conditions. Coordinator/volunteers are trained to clean up spills promptly.

The aisles are clear, free of tripping hazards, and well lit.

Stairs in good condition. No loose steps, provided with handrails, well lighted. Areas under stairways clear/no storage.

Storage

Good

Needs Work

Stored materials, products, and supplies are set in stable, balanced piles, to a reachable height. Sturdy stepladders are provided, if necessary.

Ladders are provided where needed, are of standard construction and in good condition.

Electrical

Good

Needs Work

Grounds are provided on power tools and extension cords. The equipment is in good operating condition.

The wires are in good condition and free of fraying. Wires and extension cords are not routed over metal objects or through doorways or window openings.

Circuits are not loaded beyond their capacity.

Lighting

Good

Needs Work

Light is sufficient for each job. Emergency lighting for power outages is installed. Emergency lights were tested.

Personal Protective Equipment.

Hard hats, gloves, boots, aprons, ear protectors, masks, and other protective equipment are provided, where appropriate, and are in use.

Volunteers are trained in the use of protective equipment.

Back Injury Protection

Good

Needs Work

All volunteers who do heavy lifting and moving are trained in back injury prevention and proper use of back support belts.

Volunteers who do heavy lifting and moving stretches and warm up to prevent sudden exertion of cold muscles.

Back support belts are used only to lift.

All volunteers who are not physically capable of heavy lifting and moving are instructed to leave these tasks to designated personnel.

Repetitive Motion Injury Prevention

Good

Needs Work

All volunteers who repeat the same movements throughout the day take stretch exercise breaks several times a day, as appropriate.

When possible, volunteers are given varied assignments, so they can avoid excessive stress on body parts while remaining productive.

New Volunteer Training

Good

Needs Work

New volunteers have been given basic safety training.

Automobiles and Motor Vehicles

Good

Needs Work

Operate automobiles and motor vehicles in a safe manner and in compliance with local laws.

Before engaging in cellular telephone conversations, pull over to the side of the road.

Crime/Violence Prevention

Good

Needs Work

Outdoor lighting is adequate, including the parking lot; lights are in working order.

Telephones are accessible to all work areas.

Building space is arranged so visitors can be observed.

Building space is arranged so volunteers will not be trapped in closed spaces.

Security guards, buddy system, or other methods are in place for late night operating hours.

Volunteers have received training in response to threats of violence.

Volunteers have received training in handling cash, both in the operating area and in transit.

Discreet storage is provided for volunteers' purses and other personal items.



BOA Purchasing Card Cardholder Agreement & Acknowledgment

Your signature verifies that you have read and understand the Marine Toys for Tots Foundation Purchasing Card Program guidelines and agree to comply with them.

The purchasing card is provided to Marine Toys for Tots Foundation coordinators, and/or volunteers based upon the need to purchase business related goods and services. A card may be revoked at any time based upon a change of assignment or location. A card may be deactivated at any time based on failure to adhere to the items below. Please thoroughly review, sign and return to your Accounting Specialist.

1. (initial here) The cardholder indicated on this form is the only person entitled to use the card and is responsible for all charges made against the card.

2. (initial here) Improper use of the purchasing card and/or personal charges can be considered misappropriation of company funds that may result in disciplinary action, up to and including termination of association with the program.

3. (initial here) Cardholders are expected to comply with internal control procedures in order to protect The Marine Toys for Tots Foundation assets. This includes submitting a copy of the itemized receipt via the Log Book in a timely manner (i.e., no later than five (5) days following the post date), following proper card security measures and the SOP.

4. (initial here) The card holder understands that their card may be turned off (deactivated), per the SOP, if itemized receipts are not received in a timely manner (no later than five (5) days following the post date). If your purchase card is off, you may not use a different form of tender. Contact your Regional Accounting Specialist.

5. (initial here) Use this card every time you make a Toys for Tots purchase.

6. (initial here) This card is to be used like a debit card. You **MUST** have money in your Foundation managed account (Online Financial Report) to use it. To check on your balance log into your Admin Site. **DO NOT CALL** Bank of America about your balance at any time.

7. _____ (initial here) If you receive this card as a new Coordinator, before our annual Training the only authorized purchase is Training travel and one cost appropriate meal on your travel day, and only once authorized via email from VP of Operations. No other purchases are allowed until after the Training. Direct any questions to your Accounting Specialist.

8. _____ (initial here) PIN – The majority of retailers now require a PIN to complete a transaction. Be sure to memorize this number, and keep this paper in a safe place for reference. This is your PIN: _____

9. _____ (initial here) Zip Code & Address: - Some vendors (i.e. gas stations) require a zip code; it is the Foundation's – 22172. If you are setting up bill payments, the address should be yours, NOT the Foundation's.

10. _____ (initial here) Lost or Stolen Card: please keep the card, BOA's number and all such information in a secure place. If your card is lost/stolen inform your Regional Accounting Specialist immediately.

11. _____ (initial here) Reimbursements: Complete all purchases using the Bank of America (BoFA) Purchase Card. Pay particular attention and read Section 6.25 of Reference (d) and Reference (e) concerning the Foundation's reimbursement policy. Use of personal credit cards or personal funds is not authorized to conduct Toys for Tots business. If you or one of your volunteers makes a conscious decision to use their personal credit card, the Foundation WILL NOT reimburse the Coordinator. Exceptions to this policy will only be granted at the Vice President, Operations level.

If you have any questions concerning this card please contact your Accounting Specialist.

Cardholder Printed Name:

Cardholder Signature:

Date:

Assigned Six Letter Account Code: *(If unsure, ask your Accounting Specialist)*

Please promptly return this completed form to your Accounting Specialist via e-mail

Toys for Tots Mobilization Contingency Plan

1. **Situation.** Extensive worldwide military operations have required and will continue to require the mobilization of Reserve Units (Army, Marine Corps, Navy, and Air Force) to augment regular forces. The likelihood that more Marine Reserve Units will be mobilized in the future establishes the need for a contingency plan to ensure the annual U.S. Marine Corps Reserve Toys for Tots campaign will be conducted without interruption. All aspects of the program are affected by the mobilization of forces. Organizations presently included in the Toys for Tots program are: Marine Forces Reserve (MFR), Marine Toys for Tots Foundation (MTFTF), Marine Corps League (MCL) Detachments, Peacetime-Wartime Support Team (PWST), and other local organizations within each community.

2. **Mission.** The mission of all local coordinators is to conduct the annual Toys for Tots Campaign without interruption, bringing the joy of Christmas to less fortunate children in the United States.

3. **Execution.** Each Marine Reserve Unit must have procedures in place to enable a designated organization to assume responsibility for the annual local Toys for Tots campaign in the event the unit is mobilized. The designated organization should be prepared to continue managing the local Toys for Tots campaign until the mobilization mission is completed and the unit returns to its reserve center.

a. **Concept.** The reserve unit will identify the replacement organization (typically a Marine Corps League detachment that is home-based in the Reserve Unit's community) and ensure that the leadership of the organization is knowledgeable of the conduct of a local Toys for Tots campaign. The reserve unit will have a turnover folder which includes the plan for the conduct of the annual campaign, the location of all toy drop sites, the pickup schedule, the location of the sort and storage facility, the names, addresses and phone numbers of all local points of contact, and an explanation of administrative and fund handling procedures. Information regarding the replacement organization will be provided to MTFTF.

b. **Marine Forces Reserve.** The headquarters of Marine Forces Reserve is responsible for publishing Force Order P5726.1_ and supervising activities of U.S. Marine Corps Reserve Units. MFR and MTFTF have signed a Memorandum of Understanding (MOU) outlining the tasks of each organization. One such task is the Foundation's supervisory responsibility of activities of all Local Community Organizations (LCO's).

c. **MTFTF.** The fund raising and support organization for the U.S. Marine Corps Reserve Toys for Tots Program.

d. **Reserve Units.** Conduct local Toys for Tots campaigns until mobilized. Reserve Units will have plans in place to continue local campaigns in the event the unit is mobilized.

e. **Replacement organizations (MCL Det/LCO).** Work with Reserve Units prior to mobilization and be prepared to assume full leadership and management responsibility for local TFT campaigns in the event Reserve Units are mobilized.

f. **PWST's.** These teams will be used to the maximum extent possible to assist Reserve Units and replacement organizations in the conduct of the annual Toys for Tots campaign.

g. **Coordinating Instructions:**

1) Reserve Units will coordinate with MTFTF to ensure seamless transition of leadership and management responsibilities in the event of mobilization.

2) MFR and MTFTF will work closely to facilitate this seamless transition.

4. **Admin & Logistics.** Administrative and logistical support of the annual Toys for Tots campaign are as follows:

a. Assign responsibilities to PWST's, remain behind personnel, detachment volunteers, service organization volunteers, and any other support personnel working with the unit in support of TFT.

b. Meet regularly to plan for the upcoming campaign and provide two-way communication between the Reserve Unit and the backup/support personnel who will take charge in the event mobilization occurs.

c. Create a backup vehicular support plan. Government vehicles will probably deploy/mobilize with the unit.

d. Communication with the Foundation becomes critically important when inexperienced coordinators are placed into a position of responsibility. The Foundation staff can provide invaluable assistance.

e. Promotional materials will continue to be shipped upon request.

f. Foundation assistance available M-F 0800-1700 Eastern time. Contact information is available in the Secure Section of the local website, "Foundation Contact Information."

5. **Reports.** Should the worldwide situation dictate that a reserve unit be mobilized, that unit will be notified by higher headquarters when such mobilization will occur. Subsequently, the unit TFT Coordinator will notify MTFTF of mobilization and provide the name, mail/UPS address, phone and fax number, and email address of the replacement coordinator.

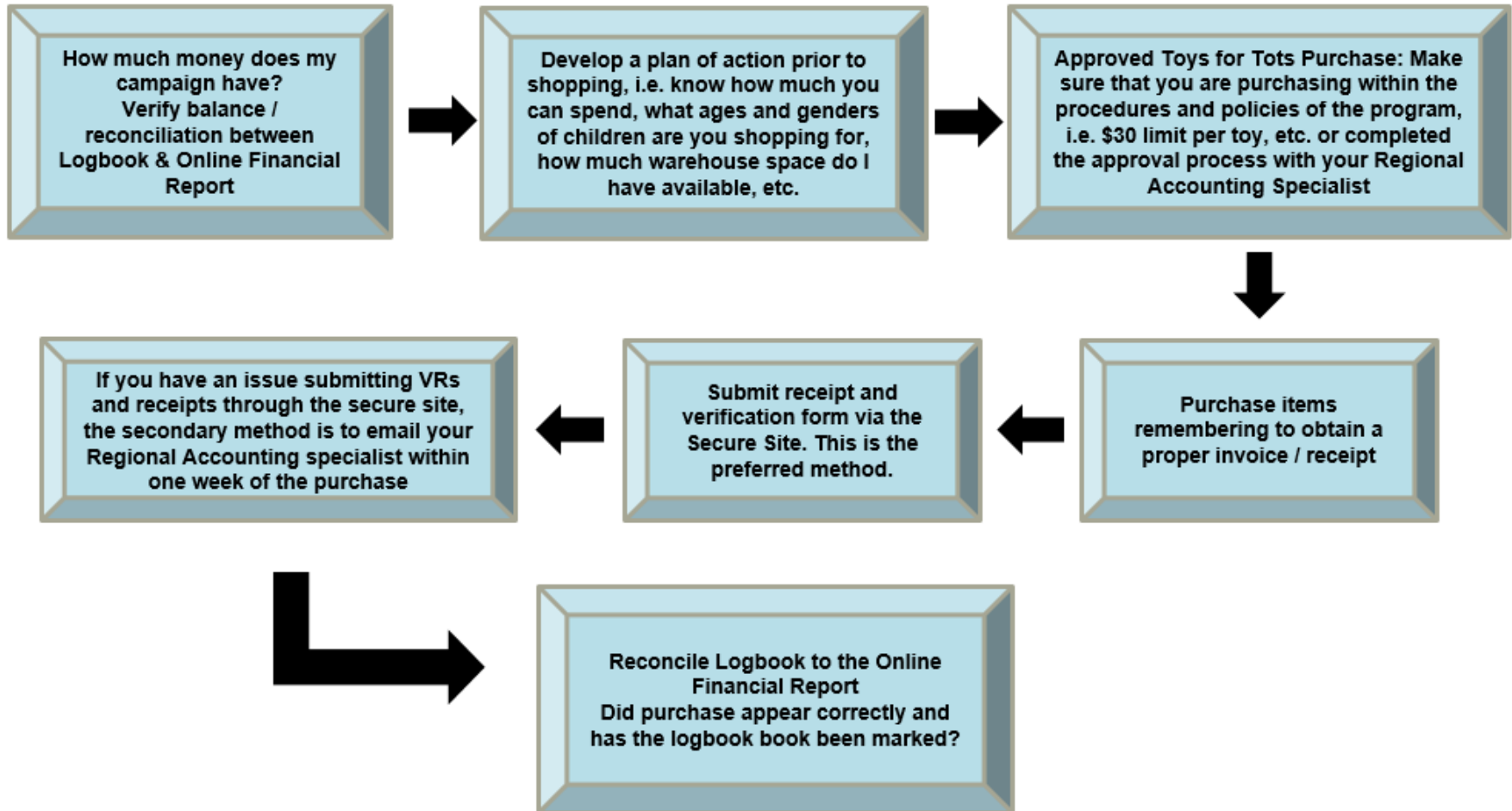
6. **Checklist.** The checklist on the following page is provided as a reminder of the importance placed upon campaign preparedness.

7. **Approval.** This plan has been approved by CMFR and the President, Marine Toys for Tots Foundation.

Checklist for Local Toys for Tots Coordinators

- Read Force Order 5000-24.2, and the SOP for Local TFT Campaigns
- Locate Turnover Folder from previous coordinator – if none, contact the Foundation for assistance
- Determine Unit Account Code (6 letters) and locate unit username and password (essential for logging into Foundation secure website)
- Establish and maintain communications with the appropriate Regional Campaign Manager and the Vice President, Operations at MTFTF
- Provide the appropriate Regional Campaign Manager your correct address, phone/FAX #s, email address
- Review the AAR to know what info you will need to collect
- Arrange with local businesses to be toy drop off locations
- Develop a regular toy pick up schedule and adhere to schedule
- Provide each drop off location a written copy of the pick-up schedule
- Provide each drop off location a name and phone number for questions
- Arrange to have full time phone watch during working hours from October 1st through Christmas Eve to respond to questions
- Coordinate with local media for coverage of campaign events
- Establish a toy distribution policy/plan
- Make liaison with local social services agencies to assist in toy distribution
- Complete distribution of toys on December 24 IAW the distribution policy/plan
- Provide MTFTF an invoice verification form IAW the SOP
- Utilize the online financial record for all account activity (deposits, purchases, and transfers, as appropriate)
- Forward all donations received and funds raised using the overnight mail envelopes and billable stamps provided by the Foundation to the designated Des Moines address
- Maintain a running log of information for the unit after action report
- Prepare and submit after action report before January 15th
- Develop and leave a turnover folder for your successor which includes:
 - Force Order
 - Foundation SOP
 - Folders with Fund Handling, Purchasing, Incidental Expense Fund information
 - Local Letter of Instruction
 - Local drop site map/instructions
 - Local points of contact
 - Local companies providing support
 - Volunteer list
 - Media contacts
 - Other pertinent information related to local campaign

Purchasing Process



Donated Toys Valuation Project

The instructions below provide guidance and details concerning the Locally Donated Toy Valuation Project that the Foundation conducts each year. Further information can be found in [Section 6.13](#) of the SOP.

Instructions:

- 1) Participating sites selected and notified by the Foundation
- 2) Foundation letter of introduction and notification presented by visitors to local coordinator
- 3) Identification of high traffic collection sites by the local coordinator
- 4) Visit by project representative – contact with local coordinator before proceeding
- 5) Project representative visits high traffic collection sites
- 6) View 10-20 toys per collection site
- 7) Photograph each toy for data collection
- 8) Price toy in store or online
- 9) Create database spreadsheet with essential information (toy description, SKU, collection site location (address, city, & state), and price)
- 10) Return to home site w/ photos and completed spreadsheet
- 11) Report completed and forwarded to the Foundation

Example After-Action Report (AAR)

Section 1: Site Information

[MENU](#)

Reserve Site/Local Community Organization: Marine Toys for Tots Foundation

Address: 18251 Quantico Gateway Dr

City: Triangle **State:** VA **Zip:** 22172

Coordinator: David Cooper **Home/Office Phone:** 555-555-5555 **Mobile Phone:**

Asst Coord: Mike Stuckey **Home/Office Phone:** 555-555-5555 **Mobile Phone:**

Population of area covered by your program: NA

Describe geographic area (sq mile, # of counties, etc.):

NA

Section 2: 2020 Inventory

Inventory from previous year campaign

Total number of Toys, Books, and Stocking Stuffers in your campaign inventory carried over from the 2020 campaign and as reported on the previous year's campaign's After Action Report.

These numbers are provided by the Foundation and cannot be modified by the local campaign.

If any of these numbers are inaccurate, contact the Foundation.

Total number of toys: (Auto-Calculated) 2358253

Total number of books: (Auto-Calculated) 544

Total number of stocking stuffers: (Auto-Calculated) 176

Adjustments to Inventory from previous year campaign

As of 1 October 2021 Inventory is as follows:

Total number of toys: 2510940

Total number of books: 544

Total number of stocking stuffers: 176

Reason if applicable:

VTB Adjustment

Section 3: 2021 Inventory

Total Remaining Inventory after the 2021 Campaign as of 31 December 2021

Enter the total number of Toys, Books, and Stocking Stuffers currently in your inventory that will carry over to the 2022 campaign.

Example After-Action Report (AAR)

Total number of toys: 1521288
 Total number of books: 148311
 Total number of stocking stuffers: 1438634
 Location of Inventory Storage:
 NA

Section 4: Gift Transfers between Local Campaigns and Units

Gifts you received from another Local Campaign(s) or UNIT(s)

Total number of Toys, Books, and Stocking Stuffers you received from other Toys for Tots Local Campaigns and Units.

RECEIVED UNIT TRANSFERS

Sending Unit	Toys	Books	Stuffers
Findlay OH	1834	0	0
Sherrodsville OH	1628	421	0
Dover DE	0	856	0
Blountstown FL	4628	745	454
Tuscola MI	592	56	128
Martinsburg WV	1979	431	1332
Magnolia TX	2455	62	524
Crockett TX	54	0	0
Hot Springs MT	2899	22	0
Austin MN	2393	100	0
St George UT	2000	868	17

Totals:

Total number of toys: 20462
 Total number of books: 3561
 Total number of stocking stuffers: 2455

Gift transfers you sent to another Local Campaign(s) or UNIT(s)

Total number of Toys, Books, and Stocking Stuffers you transferred to other Toys for Tots local campaigns and units.

SENT UNIT TRANSFERS

Receiving Unit	Toys	Books	Stuffers
Native American MT	166	0	0
Edgewater MD	33489	0	20000
Brooklyn NY	19472	0	0

Example After-Action Report (AAR)

Aurora CO	48655	0	0
Cummings GA	59092	0	0
Pasadena CA	61807	0	0
Laguna Niguel CA	194037	0	0
Laguna Niguel CA	18245	0	0
Native American MT	8794	0	0
North Versailles PA	2750	0	0
Kissimmee St Cloud FL	2698	0	0
Fort Lewis WA	2452	0	0
Brookpark OH	2452	0	0
Fort Myers FL	2366	0	0
New Orleans LA	2216	0	0
Waite Park MN	1920	0	0
Quantico VA	1772	0	0
Aubrey TX	1766	0	0
Red Bank NJ	1658	0	0
Columbus OH	1525	0	0
Cincinnati OH	1440	0	0
Tucson AZ	1392	0	0
Mentor OH	1378	0	0
New Port Richey FL	1330	0	0
Everett WA	1318	0	0
West Columbia TX	1318	0	0
McKinney TX	1318	0	0
Murrells Inlet SC	1318	0	0
Reno NV	1318	0	0
Wenonah NJ	1318	0	0
Fort Meade MD	1318	0	0
Colorado Springs CO	1318	0	0
Port Hueneme CA	1318	0	0
Conway AR	1318	0	0
Aurora CO	1270	0	0
Clear Brook VA	1180	0	0
Philadelphia PA	1152	0	0
Dallas OR	1064	0	0
Wichita KS	1048	0	0
Portland OR	930	0	0
Garden City NY	930	0	0
Richmond VA	900	0	0
Chicago IL	880	0	0

Example After-Action Report (AAR)

Augusta GA	808	0	0
Charleston SC	760	0	0
Cummings GA	748	0	0
Hialeah FL	644	0	0
Anacostia DC	594	0	0
Ceiba PR	520	0	0
Honaker VA	476	0	0
Honaker VA	476	0	0
Warrenville IL	452	0	0
Mount NC	416	0	0
Mt Laurel NJ	398	0	0
PaHrump NV	350	0	0
Harlingen TX	330	0	0
Austin TX	322	0	0
Newburgh NY	322	0	0
Kansas City MO	320	0	0
Yuma AZ	320	0	0
Camp Pendleton 4th LAR CA	300	0	0
Smithfield VA	220	0	0
Roanoke VA	220	0	0
Parkersburg WV	160	0	0
Virginia Beach VA	156	0	0
Kaneohe Bay HI	120	0	0
Moss Point MS	1183	0	0
Conroe TX	2455	62	524
Greenwood FL	4628	745	454
North Branch MI	592	56	128
Waller TX	2455	62	524
Rochester MN	2393	100	0
Helena MT	2899	22	0

Totals:

Total number of toys:	521443
Total number of books:	1047
Total number of stocking stuffers:	21630

Section 5: Gifts Collected

Gifts received as Gift In Kind from Foundation Corporate Sponsors

Example After-Action Report (AAR)

Gift In Kind donations from the Foundation's National Corporate Sponsors.

This DOES NOT include Gift In Kind from Local Campaign Sponsors.

Local Campaign Gift In Kind donations should be included in the Collected by Local Campaign section below.

Total number of toys:	625967
Total number of books:	164065
Total number of stocking stuffers:	<u>1458634</u>

Gifts received from the Foundation

Gifts purchased and shipped by the Foundation.

These numbers are provided by the Foundation and cannot be modified by the local campaign.

If any of these numbers are missing or inaccurate, contact the Foundation.

DO NOT account for these gifts in another section of the After Action Report

Total number of toys: (Auto-Calculated)	303907
Total number of books: (Auto-Calculated)	<u>1170806</u>
Total number of stocking stuffers: (Auto-Calculated)	0

Gifts purchased by Local Campaign

Toys, Books, and Stocking Stuffers purchased by the Local Campaign or Unit.

Total number of toys:	0
Total number of books:	0
Total number of stocking stuffers:	0

Gifts Collected by Local Campaign

All Toys, Books, and Stocking Stuffers not included in the total numbers above.

These represent donations from the local community and local campaign sponsors.

EXAMPLES: Toy Donation Boxes, Local Events and Parties, Local Gift In Kind

Total number of toys:	46950
Total number of books:	0
Total number of stocking stuffers:	0

Section 6: Gift Distributions, and Children Assisted

Total Gift Distribution

Total number of Toys, Books, and Stocking Stuffers distributed by your local campaign or Unit.

DOES NOT include gifts transferred to another Local Campaign(s) or UNIT(s)

Total number of toys:	<u>1465495</u>
Total number of books:	<u>1189618</u>

Example After-Action Report (AAR)

Total number of stocking stuffers: 1001

Adjusted Distribution Total For Release To Public: (Auto-Calculated) 1862234

Numbers are based on following formula:

One (1) Toy = 1 Toy

Three (3) books = 1 Toy

Five (5) stocking stuffers = 1 Toy

Total number of children receiving toys: 726622

Local Campaign Inventory Summary

Based on the numbers you reported in the previous sections, your local campaign inventory:

BALANCES

If you After Action Report Balances, click the Submit button to continue.

If your After Action Report Does Not Balance, your Inventory MUST balance before you can continue with the After Action Report.

To revise your numbers do one of the following:

Revise Gift Transfers

Revise Gifts Collected

Revise Gift Distributions

Revise Total Remaining Inventory after the current Campaign

For numbers that are auto-calculated and you are not able to revise, contact your Accounting Specialist

Total Remaining Inventory reported in Section 3: Auto-Calculated Remaining Inventory based on Sections 4, 5, and 6:

Total number of toys:	<u>1521288</u>	<u>1521288</u>
Total number of books:	148311	148311
Total number of stocking stuffers:	<u>1438634</u>	<u>1438634</u>

Total number of children receiving toys: 726622

Average number of toys given to each child: (Auto-calculated) 2.56

Section 7: Monetary Contributions

Funds in local campaign account

Contact the Foundation if these numbers are missing or inaccurate.

Transferred into local account by the Foundation: (Auto-calculated) 82632.75

Online Financial Report = MFTF Transfers

Deposited into local account by the Foundation:(Auto-calculated) 11917.34

Example After-Action Report (AAR)

Online Financial Report = Foundation Deposit

Total of donations collected locally (begins 1/15/): 0.00
Example: Donations physically handled by the local campaign coordinator.

DOES NOT include the funds reported above that were Transferred and Deposited by the Foundation.

Total amount forwarded to the TFT Foundation: 0.00
Donations not forwarded to the TFT Foundation:(Auto-calculated) \$0.00

Provide reasons all donations were not forwarded to the Foundation:

All Funds Forwarded

Total amount spent for toy purchases: 412952.54
Total amount spent for other than toys: 0.00
Percentage spent for other than toy purchases:(Auto-calculated) 0.00 %

Section 8: Media Support

Television

List the TV stations supporting, and their network affiliation (ABC, NBC, CBS, FOX, etc.):

N/A

Radio

List the radio stations supporting, and their network affiliation (ABC, NBC, CBS, FOX, etc.):

N/A

Print Media

List any newspapers, magazines, or other print media supporting:

N/A

Social Media

Is your site involved with the social media sites "Facebook" or "Twitter"?

NO



If "Yes" explain briefly:

Section 9: Comments

1. List significant promotions or events that were effective:

Example After-Action Report (AAR)

N/A

2. List any significant problems incurred during the campaign, and any comments or suggestions regarding future efforts:

Did your campaign receive any support from U.S. Marine Corps Recruiters?

NO 



**MARINE CORPS RESERVE TOYS FOR TOTS PROGRAM
VOLUNTEER SERVICE VERIFICATION FORM**

This form is to be used to track volunteer service hours. Some volunteers, such as employees participating in an employer charity program, high school students, scouts, etc. require verification of community service hours. Coordinators will retain copies of this form for two years.

In the event the Foundation notifies Coordinators about an employer charity program, please scan / email completed forms to your respective Regional Accounting Specialist.

Campaign Name (City, State) _____

Campaign Accounting Code / Region #: _____

Coordinator Name: _____

Coordinator Contact (email/phone): _____

Volunteer's Name: _____

Volunteer's Organization Name: _____

<u>Date</u>	<u>Activity</u>	<u>Hours</u>
<u>TOTAL HOURS</u>		

VOLUNTEER PRINTED NAME: _____

VOLUNTEER SIGNATURE: _____

DATE: _____

COORDINATOR PRINTED NAME: _____

COORDINATOR SIGNATURE: _____

DATE: _____



MARIT0Y-01

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
5/21/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement.

PRODUCER: COVA Insurance, 900 Stanhope Gardens Suite 100, Chesapeake, VA 23320
CONTACT NAME:
PHONE (A/C, No, Ext):
FAX (A/C, No):
E-MAIL ADDRESS:
INSURER(S) AFFORDING COVERAGE:
INSURER A: Selective Insurance Co of SC, NAIC #: 19259
INSURER B: Hartford Casualty Insurance Company, 29424
INSURER C:
INSURER D:
INSURER E:
INSURER F:

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

Table with columns: INSR LTR, TYPE OF INSURANCE, ADDL INSD, SUBR WVD, POLICY NUMBER, POLICY EFF (MM/DD/YYYY), POLICY EXP (MM/DD/YYYY), LIMITS. Rows include Commercial General Liability, Automobile Liability, Umbrella Liability, and Workers Compensation.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER CANCELLATION
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
AUTHORIZED REPRESENTATIVE

ACORD 25 (2016/03)

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PHOTO RELEASE FOR ADULTS

I hereby authorize and consent to the use of my visual image by the Marine Toys for Tots Foundation (MTTF), or its Corporate Sponsors and Direct Marketing agencies, for appropriate purposes, including but not limited to: still photography, videotape, electronic and print publications, and websites. MTTF sponsors and agencies will only use these images in conjunction with their support of and relationship with MTTF.

I give this consent with no claim for payment.

Name: _____

Signature: _____

Date: _____

In case the Foundation needs to contact you, please provide your phone number and email address:

Phone number: _____

Email Address: _____

18251 Quantico Gateway Drive, Triangle, Virginia 22172 Phone: (703) 640-9433 Fax: (703) 649-2054



PHOTO RELEASE FOR CHILDREN/MINORS (UNDER AGE 18)

As the Parent or Guardian of the child listed below, I hereby authorize and consent to the use of his/her visual image by the Marine Toys for Tots Foundation (MTFTF), or its Corporate Sponsors and Direct Marketing agencies, for appropriate purposes, including but not limited to: still photography, videotape, electronic and print publications, and websites. MTFTF sponsors and agencies will only use these images in conjunction with their support of and relationship with MTFTF.

I give this consent with no claim for payment.

Name of Child: _____

Name of Parent/Guardian: _____

Signature of Parent/Guardian: _____

Date: _____

In case the Foundation needs to contact you, please provide your phone number and email address:

Phone number: _____

Email Address: _____

18251 Quantico Gateway Drive, Triangle, Virginia 22172 Phone: (703) 640-9433 Fax: (703) 649-2054





For additional information or comments about the SOP, contact:

The Marine Toys for Tots Foundation
Attn: Vice President, Operations
18251 Quantico Gateway Drive
Triangle, VA 22172