



## HOW TO USE DONOR CENTRAL

**Your online tool for managing your fund at the Mid-Shore Community Foundation**

### GET STARTED

To log on to Donor Central, start by clicking on Donor Central in the drop-down menu on our Home Page, [www.mscf.org](http://www.mscf.org), as illustrated above.

### ENTER USER NAME & PASSWORD

Once you are on the Donor Central page on our website, enter the user name and password given to you by MSCF. Once you log on as a fund advisor, you will be asked to change your password to protect your privacy. Only designated fund advisors will have access to their fund information in Donor Central.

If you don't have a user name and password from MSCF, contact Robbin Hill, Director of Foundation Programs at 410-820-8175, Ext 103.

### NAVIGATING DONOR CENTRAL

#### Donor Central Home

**My Interest** allows donor advisors to screen grant opportunities by fields of interest – education, environment, etc.

**Fund Summary** provides fund information for the current year and previous years, since the inception of the fund.

**Gifts** shows all gifts that have been posted to your fund. If a security is in the process of being transferred, it will not show on the gift history until MSCF has received the shares into your account.

**Grants Paid** shows all approved grants for which a check has been issued.

**Grants Pending** includes grants you have recommended but we have not yet paid.

**Fund Expense** includes all “operating” expenses paid on behalf of your fund.

**Spendable Balance** reflects your current available funds. This figure is determined using MSCF’s spending policy (5% of the fair market value of the fund averaged over 12 quarters). If the fund agreement prohibits spending when the value of the fund is below the historic gift value, or limits spending to interest and dividends, this amount will be adjusted accordingly.

**Market Value** reflects the fund balance updated daily for contributions, grants, and expenses. However, investment returns are typically posted 14 days following the close of the previous month’s investment activity.

**Research a Group** is a searchable database to assist you in researching organizations that MSCF has funded through discretionary grants or donor-advised funds.

**Your Grant Recommendations** allows you to recommend grants electronically. Recommendations can be “stored” until you are ready to submit your list.

**Contact Us** provides the contact information for our staff, should you have any questions.

**Frequently Asked Questions** provides answers for most common questions.

### **Other Options**

**Grant Opportunities** lists unfunded grant requests received through our twice-yearly grant cycles.

**My Profile** shows the contact information we have for you in our database. Please review and edit this information as needed to allow us to maintain our database.

**Other Advisors** lists all other advisors to your Fund.

**Download Forms** links to MSCF forms that you may wish to print or save.

**Sign Off** for security purposes when you have finished in Donor Central.