



# **COMMUNITY DEVELOPMENT FINANCE AUTHORITY**

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CAPACITY BUILDING APPLICATION WRITING WORKSHOP

JANUARY 20, 2026



# AGENDA

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Welcome

How the Tax Credits Work

Working with CDFA

Application Overview

Resources

Next Steps

# CDFA's TEAM

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# **WORKING WITH CDFA**

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# PRE-APPLICATION ASSISTANCE

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Schedule a meeting



CDFA's Resource Hub



On-going Technical Assistance

# CAPACITY BUILDING TAX CREDITS

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***Building capacity to advance community economic development and infrastructure projects meeting the needs of vulnerable communities.***

## ELIGIBLE APPLICANTS

- Community development corporations
- Nonprofit organizations
- Municipal governments
- Cooperatives

## AVAILABLE RESOURCES

- Up to \$150,000 over two years, maximum of \$75,000 per year
- Total allocation available: \$750,000

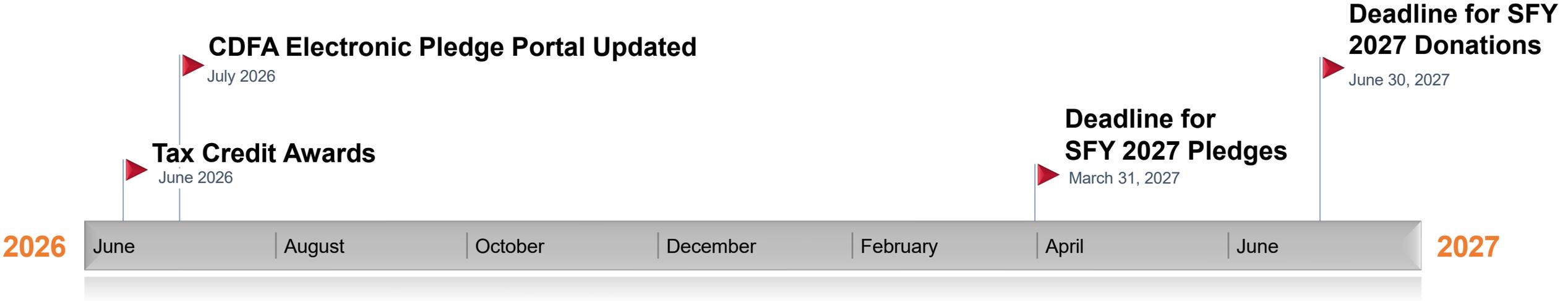
## TYPES OF PROJECTS / ACTIVITIES

- Strengthening organizational infrastructure
- Increasing collaboration
- Exploring new ideas or programs

## DEADLINE

- March 6, 2026 BY 4:00 PM

# GRANT PROCESS



**Fundraising**

**Funds available to projects**  
(as available per contract)

# HOW THE TAX CREDIT WORKS

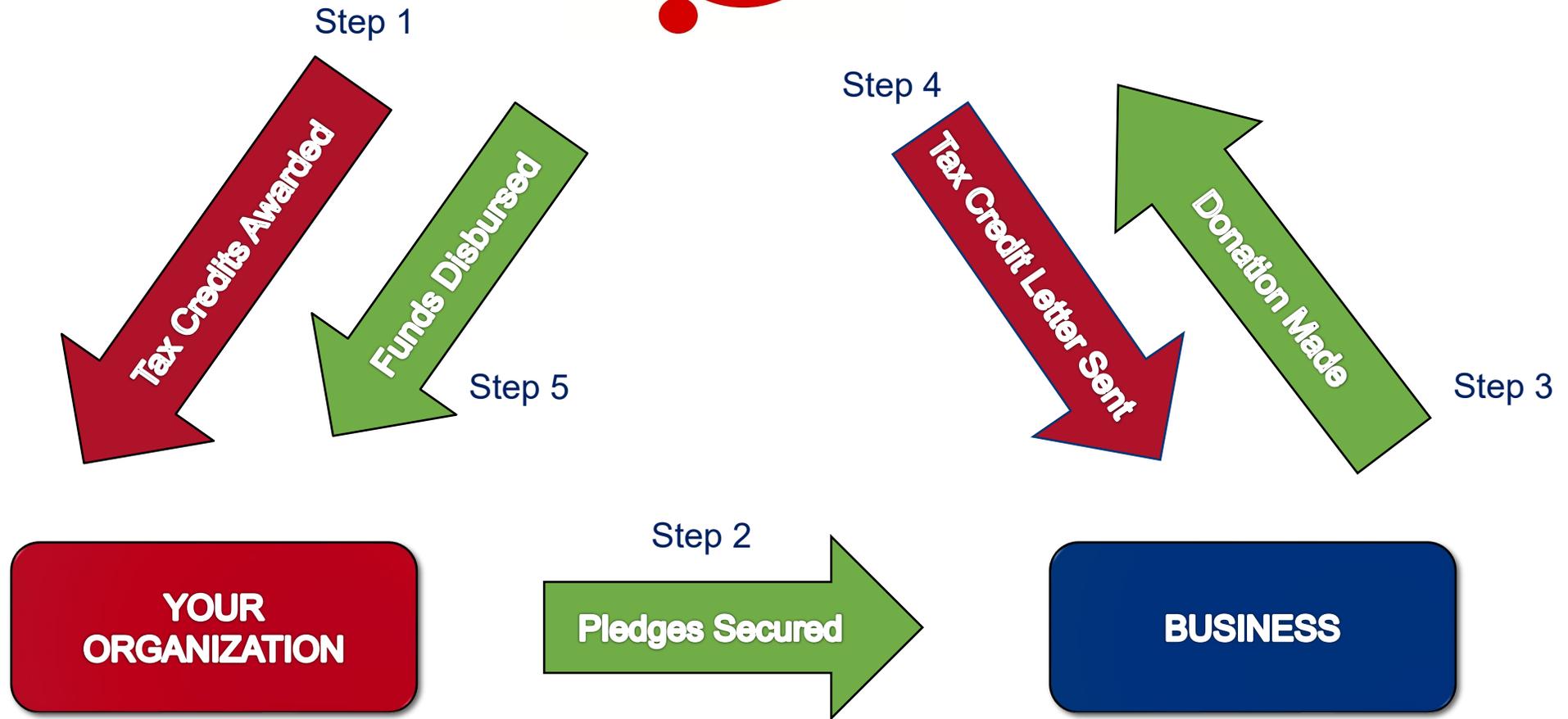
Businesses receive a tax credit equal to 75% of the donation made to an approved project

Applied against New Hampshire business taxes

- Business profits tax
- Business enterprise tax
- Insurance premium tax

Donation may be eligible as state and federal charitable contribution

May carry forward the credit for up to five years



# AWARDS

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## FUNDRAISING TIMELINE

### **SFY 2027**

Pledges Due: March 31, 2027

Donations Due: June 30, 2027

### **SFY 2028**

Pledges Due: March 31, 2028

Donations Due: June 30, 2028

# APPLICATION OVERVIEW



## COMMUNITY ECONOMIC DEVELOPMENT CAPACITY BUILDING APPLICATION AND PROGRAM GUIDE



# TIPS FOR ONLINE APPLICATIONS

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Study the Application & Program Guide

Draft responses in a document such as Word or GoogleDoc

Start early and save often

Plan to submit early

Technical issues with GMS reach out to Nate Olson [nolson@nhcdfa.org](mailto:nolson@nhcdfa.org)



# READINESS

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Community Engagement & Support

Proven Need

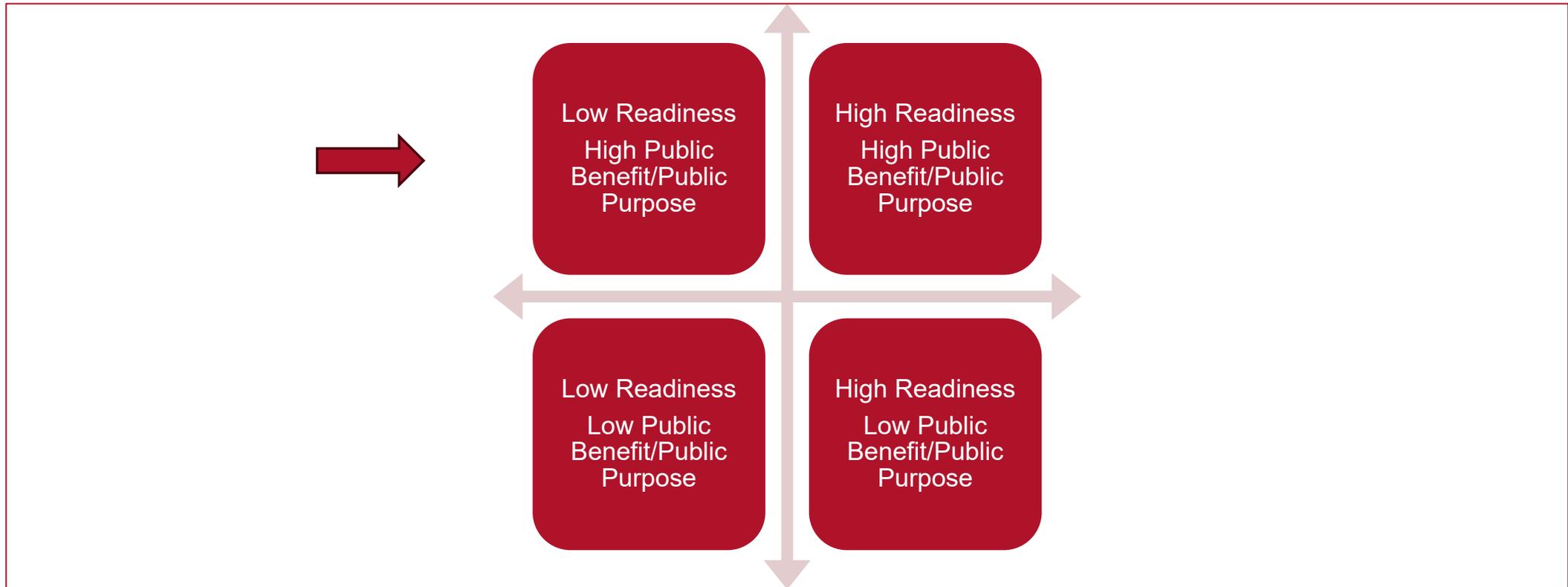
Organizational Capacity

Networks with Business Community

Leadership

# APPLICATION EVALUATION

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I. Applicant  
Information

II. Project  
Information

III. Narrative  
Requirements

IV. Budget/  
Fundraising

V.  
Attachments

VI.  
Certification

# APPLICATION OUTLINE

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# APPLICATION OUTLINE

# APPLICANT INFORMATION

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## Applicant Information

- Project name, address, etc.

## Roles

- Authorized official
- Primary contact
- Grant writer

## Fiscally Sponsored Entity Name (if applicable)



# FISCAL SPONSOR DEFINITION & REQUIREMENTS

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DEFINITION: An existing 501(c)(3) nonprofit that provides its legal and financial 501(c)(3) status to smaller projects that share a similar mission but lack their own tax-exempt status, allowing it to accept charitable contributions.

## CDFA REQUIRES:

- Written fiscal sponsorship agreement that clearly outlines the terms of the relationship, signed by both parties. This is a threshold requirement for the application.
- Written notice should the project change fiscal sponsors after funding is awarded

[CDFA's Fiscal Sponsor Guidance](#)

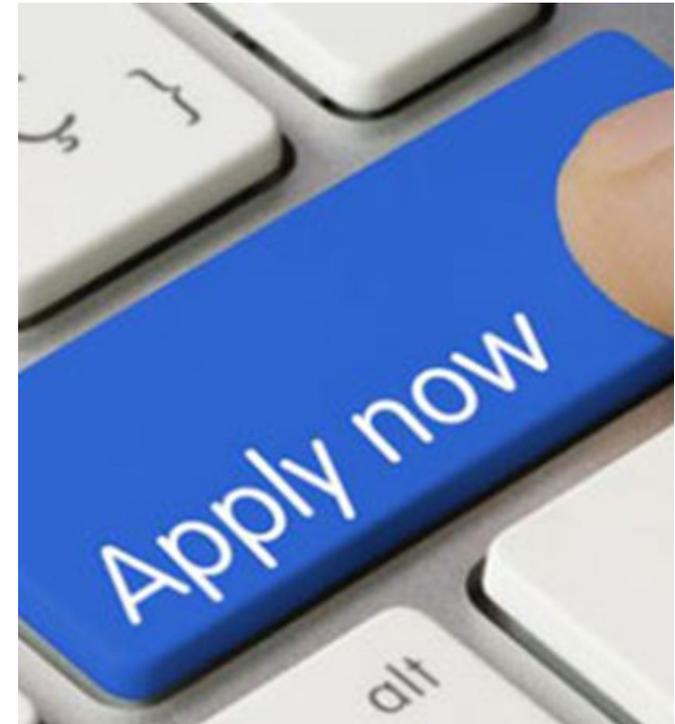
# PROJECT INFORMATION

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## Project Information

- Project can be up to two years
- Funding request - up to \$75,000 per year / maximum \$150,000

**Who Would You Like to Complete Fundraising Activities in Year 1?**



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# APPLICATION OUTLINE

# TIPS FOR WRITING A GRANT PROPOSAL NARRATIVE

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*Provide a narrative that describes the proposal. Include details about how the proposal materialized, the partners involved, and the proposed project timeline.*



Be clear



State problem and use data to explain



Explain the capacity you need and why



Longer is not always better!

# PROJECT NARRATIVE OVERVIEW

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Organizational Capacity Needed

Challenge Addressed

Priority Addressed

Long Term Value

Impact of Funds

Growth and Success

# PROJECT NARRATIVE: ORGANIZATIONAL CAPACITY NEEDED

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*What organizational capacity are you looking to build?*

*How do you know that is needed?*

*How does increased capacity help you meet your mission, in general and specific community economic development challenges?*

Strengthen the skills, abilities and processes of an organization.

# PROJECT NARRATIVE: CHALLENGE ADDRESSED

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*What specific problem or community economic challenge does your organization and/or your work address?*

*How will adding organizational capacity help work toward this challenge and future initiatives and infrastructure projects.*



# PROJECT NARRATIVE: PRIORITY ADDRESSED

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*Explain how your proposal addresses the priority areas of collaboration, place based strategies, innovation, community engagement and benefiting priority populations and/or areas.*



**Collaboration, strategic alliances, partnerships** in community economic development efforts.



**Place-based strategies** that support priority populations, revitalize community, and strengthen local economies.



**Innovative** models of governance, initiatives, or organizations.



**Community Engagement** efforts to engage the community for priority setting and place reinvestment and revitalization.

# DEFINITIONS

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## ***Priority populations***

Black, Indigenous, and People of Color (BIPOC); immigrants and refugees; women; people with disabilities; LGBTQ and gender non-conforming; rural; youth; unhoused residents; low- and moderate-income. Identified priority populations are based on the findings of the Analysis of Impediments to Fair Housing Choice in New Hampshire. Applicants may define additional priority populations with supporting data in their application.

## ***Priority areas***

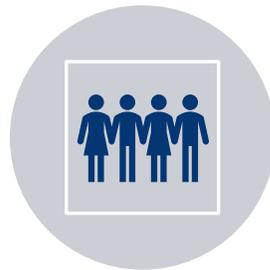
Places with a high need as outlined in the Community Progress Indicators which measure socioeconomic well-being and community need at the municipal level in New Hampshire, including Basic Human Needs, Access to Opportunity, and Community Sustainability and Vibrancy.

# PROJECT NARRATIVE: LONG TERM VALUE

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*Describe the long-term value of this proposal to the community your organization serves.*

*Please consider what existing community systems will be impacted by this proposal and the collaboration it will facilitate or enhance.*



IMPACT TO THOSE  
YOU SERVE



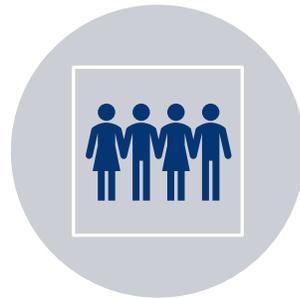
IMPACT TO YOUR  
COMMUNITY

# PROJECT NARRATIVE: IMPACT OF FUNDS

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*How will this one-time infusion of resources allow your group to expand its capacity and ability to advance your project?*

*When is the most ideal time for you to be able to access these resources to ensure you are on track with your project goals?*



IMPACT TO YOUR  
ORGANIZATION



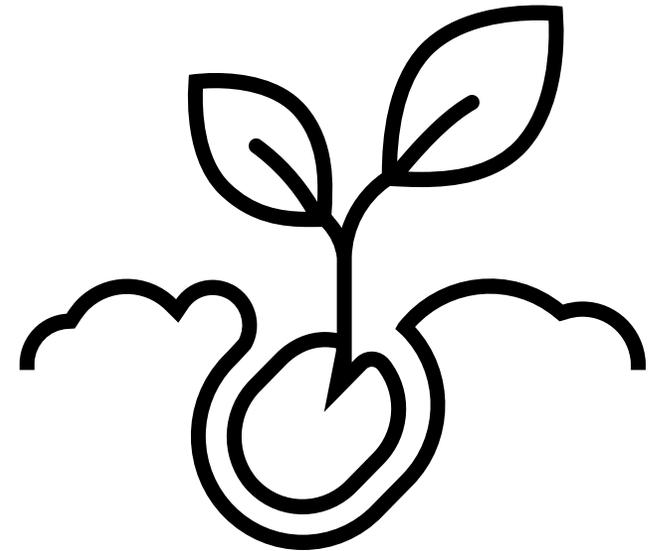
IDEAL TIMING OF  
FUNDS

# PROJECT NARRATIVE: GROWTH & SUCCESS

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*How will you know if this proposal is successful?*

*What will look different if the proposal works as planned?*



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# APPLICATION OUTLINE

# BUDGET & FUNDRAISING

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## Project Budget

- Project budget with all funding sources and dollar amounts

## Fundraising

- Experience in fundraising
- Challenges in accessing resources
- Opportunity to expand your access to funds
- Potential donor letters

# PROJECT BUDGET

 **Project Budget - Grid**

Provide a budget with line-items for the use of Grant funds. Indicate the level of funding needed within the following areas:  
Capacity building: Funds used to strengthen organizational infrastructure. Resources will further enable partner organizations to deliver increased value and meaning to  
Planning and development: Funds used to develop a business plan, implementation strategy and / or continue outreach to further develop business partnerships.  
Implementation: Funds used to implement Tax Credit programming and services.  
Support and optimization: Funds used to evaluate, improve and sustain programming and services.

Row	Tax Credits	Other Sources 1
Professional Fees		
Staff Training		
Salaries/ Wages		
Supplies		
Travel		
Marketing/ Communications		
Other		
Other		
Other		

# BUDGET & FUNDRAISING

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## Project Budget Narrative

- What experience do you have in fundraising?
- What challenges has your group experienced in accessing other resources?
- How might this proposal result in your group's ability to access additional public or private resources?
- What other funding have you applied to or are receiving?

# BUDGET & FUNDRAISING

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## Financial Environment

- Tell us about how you manage your finances.
- Is there anything else you'd like us to know about your project or organizational finances?

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# APPLICATION OUTLINE

# FINANCE & GOVERNANCE ATTACHMENTS

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## *Organizational Governance Documents*

- Articles of Incorporation/IRS determination letter
- By-laws
- Board of Directors
- Organizational chart
- Proof of Good Standing – NH Department of Justice Registered Charities List

## *Financial Documents*

- Operating Budget
- IRS Form 990 or Financial Review Statement or Audited Statement

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# APPLICATION OUTLINE

# VI. CERTIFICATION

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Authorization to submit application

Compliance with New Hampshire's conflict of interest laws and CDFA's privacy policy



# **USING CDFA'S GRANTS MANAGEMENT SYSTEM (GMS)**

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# GRANTS MANAGEMENT SYSTEM

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*Getting registered on CDFA's Grants Management System (GMS).*

New Users Register at [www.nhcdfa.grants.org](http://www.nhcdfa.grants.org) by following our [step-by-step registration guide](#)

Existing Users

- Sign in with your current account credentials
- Need help accessing your account? Use our [password recovery video](#).

**Registration questions?**

Reach out to Melanie Steenbeke at [msteenbeke@nhcdfa.org](mailto:msteenbeke@nhcdfa.org) for support!

# GRANTS MANAGEMENT SYSTEM

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***Starting an application? Access the [detailed guide](#).***

1. Log onto the CDFA's [Grants Management System](#)
2. Select Funding Opportunities
3. Capacity Building Program for SFY 2027 Tax Credits (ID 37016)
4. Select Start New Application

**GMS Technical Support Questions?** Reach out to Nate Olson [nolson@nhcdfa.org](mailto:nolson@nhcdfa.org)

1

Login

Enter your user id and password

User ID

Password

SIGN IN

Forgot User ID?

Reset Password?

Click here to register

### Currently Posted Funding Opportunities

3

All currently posted opportunities appear below. The Application Deadline indicates the due date for application submission. You will be unable to submit your application after this date.

Search:

ID	Status	Agency	Program Area	Title	Posted Date	Final-Application Due Date
29850	Posted	NH CDFA	TEST	Review Test	Oct 30, 2025 11:52 AM	Not Applicable
14427	Posted	NH CDFA	Tax Credit Bridge Loan	Tax Credit Bridge Loan	Dec 2, 2025 12:25 PM	Not Applicable
28172	Posted	NH CDFA	Recovery Housing Program	Recovery Housing Program	Dec 23, 2025 2:48 PM	Not Applicable
34572	Test	NH CDFA	Investment Tax Credits	[TEST] Investment Tax Credits Budget	Jan 19, 2024 8:50 AM	Apr 23, 2025 4:00 PM
36719	Posted	NH CDFA	Investment Tax Credits	2027 and 2028 Investment Tax Credits	Dec 16, 2025 8:47 AM	Mar 6, 2026 4:00 PM
37016	Posted	NH CDFA	Investment Tax Credits	Capacity Building Program for SFY 2027 Tax Credits	Dec 16, 2025 11:50 AM	Mar 6, 2026 4:00 PM
37688	Posted	NH CDFA	Investment Tax Credits	Tax Credit Grant Writing Assistance 2026	Nov 24, 2025 3:48 PM	Not Applicable
	Test	NH CDFA	Investment Tax Credits	TEST Tax Credit Status Reports		Not Applicable
	Posted	NH CDFA	Community Development Fund	Community Development Loan Program 2024-2025	Dec 15, 2025 4:07 PM	Jan 31, 2026 4:05 PM

2

TEST Nate TEST Olson  
Tester  
Tester Role

All currently a

Dashboard

Work Assignment

Calendar

Alerts

Site Visits

Document Repository

Funding Opportunities

Copy Existing Application

Start New Application

lits

4

ject Manager:

Betsy McNamara

ne:

(603) 717-9116 x

ail:

taxcredits@nhcdfa.org

# GRANTS MANAGEMENT SYSTEM

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## *Tips for using CDFA's Grants Management System.*

Detailed guides can be found on the GMS section of CDFA's [Resource Website](#)

1. Draft responses using a word processor and copy into GMS
2. Start early & save often
3. Submit well before the application deadline.

Technical issues reach out to Nate Olson [nolson@nhcdfa.org](mailto:nolson@nhcdfa.org)

Registration issues reach out to Melanie Steenbeke [msteenbeke@nhcdfa.org](mailto:msteenbeke@nhcdfa.org)



# NEXT STEPS

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Register for CDFA's Grants Management System

Review Application and Program Guide

Schedule a Pre-application Meeting with CDFA Staff

Review Webinars

# APPLICATION TIMELINE

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# PRE-APPLICATION MEETINGS

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*Schedule a pre-application meeting with CDFA staff to receive guidance specific to your project.*

Meetings available January 21 – February 6

Provide CDFA the following project information:

- Project location
- Brief description
- Project timeline
- Proposed budget and sources



**QUESTIONS  
&  
THANK YOU**

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**Community Development Finance Authority**  
**[www.nhcdfa.org](http://www.nhcdfa.org)**

**603-226-2170**

# **ADDENDA TO WEBINAR SLIDES**

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# EXAMPLE: MANAGEMENT PREPARED FINANCIALS

## Statement of Financial Position As of December 31, 20XX

ASSETS	
<b>CURRENT ASSETS</b>	
Cash and Cash Equivalents	\$ 255,520
Accounts Receivable	7,750
Pledges Receivable	32,000
Prepaid Expenses	57,250
Total Current Assets	<u>352,520</u>
<b>PROPERTY AND EQUIPMENT</b>	
Fixed Assets, Net	<u>2,059,868</u>
<b>OTHER ASSETS</b>	
Investments	106,596
Right of Use Asset for Finance Lease	5,373
Right of Use Asset for Operating Lease	346,115
Cash Restricted for Long-Term Purposes	25,000
Total Other Assets	<u>483,084</u>
<b>TOTAL ASSETS</b>	<u>\$ 2,895,472</u>
<b>LIABILITIES AND NET ASSETS</b>	
<b>CURRENT LIABILITIES</b>	
Accounts Payable	\$ 13,852
Accrued Expenses	12,344
Refundable Advance	15,500
Line of Credit	34,000
Finance Lease Liability - Current Portion	2,572
Operating Lease Liability - Current Portion	89,824
Mortgage Payable - Current Portion	19,838
Total Current Liabilities	<u>187,930</u>
<b>LONG-TERM LIABILITIES</b>	
Finance Lease Liability	2,874
Operating Lease Liability	286,258
Mortgage Payable	841,929
Total Long-Term Liabilities	<u>1,131,061</u>
<b>TOTAL LIABILITIES</b>	<u>1,318,991</u>
<b>NET ASSETS</b>	
Net Assets without Donor Restrictions	1,494,481
Net Assets with Donor Restrictions	82,000
<b>TOTAL NET ASSETS</b>	<u>1,576,481</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u>\$ 2,895,472</u>

# EXAMPLE: OPERATING BUDGET

Example Budget		
<b>Income</b>		
	In-Kind Donations	1,200
	Fundraising Income	
	Business Donations	40,000
	Civic Groups & Church Donations	25,500
	Events	
	Annual 5K	5,000
	Auction	7,000
	Christmas Fair	2,500
	Other	3,000
	Grants	
	Government	130,000
	State & Town	43,000
	Other	8,000
	Investment Interest	6,000
	Program Fees	3,200
	Other Income	4,000
	<b>Total Income</b>	<b>278,400</b>
<b>Expense</b>		
	Dues & Fees	500
	Equipment	1,200
	Fundraising Expenses	2,000
	Maintenance	2,400
	Office Supplies	700
	Postage	200
	Rent	30,000
	Stipends	400
	Utilities	4,800
	Payroll	
	Salaries & Wages	
	Administration	50,000
	Grant 1	120,000
	Grant 2	60,000
	Benefits	25,000
	Taxes	15,525
	Staff Development	5,000
	Printing	1,000
	<b>Total Expense</b>	<b>276,525</b>
	<b>Net Income</b>	<b>1,875</b>

# EXAMPLE: BUDGET-TO- ACTUAL

Example Budget					
Income		Budget	Actual	\$ Over Budget	% Over Budget
	In-Kind Donations	1,200	945	(255)	79%
	Fundraising Income				
	Business Donations	40,000	35,600	(4,400)	89%
	Civic Groups & Church Donations	25,500	19,500	(6,000)	76%
	Events				
	Annual 5K	5,000	9,623	4,623	192%
	Auction	7,000	6,233	(767)	89%
	Christmas Fair	2,500	8,554	6,054	342%
	Other	3,000	19,236	16,236	641%
	Grants				
	Government	130,000	130,000	-	100%
	State & Town	43,000	43,000	-	100%
	Other	8,000	7,451	(549)	93%
	Investment Interest	6,000	5,384	(616)	90%
	Program Fees	3,200	2,888	(312)	90%
	Other Income	4,000	5,221	1,221	131%
	<b>Total Income</b>	<b>278,400</b>	<b>293,635</b>		
	Expense				
	Dues & Fees	500	495	(5)	99%
	Equipment	1,200	-	(1,200)	0%
	Fundraising Expenses	2,000	2,495	495	125%
	Maintenance	2,400	2,395	(5)	100%
	Office Supplies	700	822	122	117%
	Postage	200	190	(10)	95%
	Rent	30,000	30,000	-	100%
	Stipends	400	600	200	150%
	Utilities	4,800	4,724	(76)	98%
	Payroll				
	Salaries & Wages				
	Administration	50,000	44,900	(5,100)	90%
	Grant 1	120,000	119,460	(540)	100%
	Grant 2	60,000	59,221	(779)	99%
	Benefits	25,000	24,995	(5)	100%
	Taxes	15,525	15,092	(433)	97%
	Staff Development	5,000	2,623	(2,377)	52%
	Printing	1,000	529	(471)	53%
	<b>Total Expense</b>	<b>276,525</b>	<b>266,820</b>		
	<b>Net Income</b>	<b>1,875</b>	<b>26,815</b>		

# DOCUMENT EXPLANATIONS

Required Doc	Explanation
Experience (2,000 characters)	Describe your experience fundraising
Resource Challenges (2,000 characters)	Describe any challenges your group has experienced in accessing other resources. How might this proposal result in your group's ability to access additional public or private resources?
Fiscal Sponsor (File upload)	Note if the project has a fiscal sponsor, and if so, upload the relevant MOU between the fiscal sponsor and sponsoree.
Advisory Board (2,000 characters)	Provide a link to the Advisory Board or Board of Directors or paste information into field
Bylaws and Org Chart (File upload)	Organization by-laws and organizational chart, if available.

# DOCUMENT EXPLANATIONS

## (continued)

Required Doc	Explanation
Fiscal Year Start & End Dates	January 1 - December 31, July 1 – June 30, or other
Operating Budget – Current Fiscal Year (File upload)	The organization’s overall budget for operating income and expenses for the current year, as approved by the applicant’s governing body.
Operating Budget-to-Actual, Previous Fiscal Year (File upload)	This document shows both the overall budget for income and expenses, as well as the actual numbers, for the most recently completed fiscal year. Generally, a budget-to-actual or ‘BTA’ document will have several columns: a list of income and expense line-items, a budgeted amount for each line item, the actual dollars received (for income) and expended for each line item, and a percentage difference between the budgeted amount and the actual performance for each line item.

# DOCUMENT EXPLANATIONS

## (continued)

Required Doc	Explanation
Other Sources (File upload)	What are your sources of income for the proposed project and/or organization?
Project Budget (Data entry)	<p>Provide a budget with line-items for the use of Grant funds. Indicate the level of funding needed within the following areas:</p> <ul style="list-style-type: none"><li>• Capacity building: Funds used to strengthen organizational infrastructure. Resources will further enable partner organizations to deliver increased value and meaning to the communities they serve</li><li>• Planning and development: Funds used to develop a business plan, implementation strategy and / or continue outreach to further develop business partnerships.</li><li>• Implementation: Funds used to implement Tax Credit programming and services.</li><li>• Support and optimization: Funds used to evaluate, improve and sustain programming and services.</li></ul>

# DOCUMENT EXPLANATIONS (continued)

Required Doc	Explanation
Most Recent Financial Statement(s)	Submit <b>one</b> of the following for the most recent past fiscal year completed, if applicable Audited Financial Statement (required for organizations with operating budgets > \$2 M) <b>OR</b> Reviewed Financial Statement (required for organizations with operating budgets \$500,000 - \$2 M) <b>OR</b> IRS Form 990 (required for organizations with operating budgets <\$500,000)
Management Prepared Financials	Latest Balance Sheet, Profit & Loss, Cash Flow Statement for the current fiscal year, as approved by the applicant's governing body.

# DOCUMENT EXPLANATIONS

## (continued)

Required Doc	Explanation
Applicant's Financial Environment	<p>Questions you might consider include:</p> <ul style="list-style-type: none"><li>• Do you have dedicated finance staff, a finance committee, or other financial technical assistance?</li><li>• Who prepares your budget and financials?</li><li>• What software do you use to manage your budget and financials (e.g., Excel, QuickBooks)?</li><li>• Do you have policies or plans to create policies addressing cash handling and separation of duties?</li><li>• What other funding have you applied for or are receiving? For what purpose?</li><li>• Is there anything else you'd like us to know about your financial house?</li></ul>