



## How to Schedule a Pre-Application Meeting with CDFA

If you are interested in pursuing an application within the 2024 funding round, please consider scheduling a pre-application meeting with CDFA staff. These meetings are a great opportunity for us to learn more about your project, answer any questions you may have about the program or application, as well as provide guidance specific to your project.

Instructions on how to schedule a pre-application meeting can be found below. Please note we anticipate all meetings will be scheduled by February 6, 2026. If you experience any difficulties scheduling an appointment, please let us know.

### How to schedule a technical assistance meeting with CDFA staff

1. Select one individual from your organization/project team to schedule the appointment as we can only accommodate one meeting per organization.
2. [Visit this link](#) to schedule your technical assistance meeting.
3. Select the meeting option that best fits your needs. Consider the following three options:
  - a. **Tax Credit Program Pre-Application Meeting:** Select this meeting option if you are considering a Tax Credit grant to advance a community economic development project (often infrastructure).
  - b. **Capacity Building Program Pre-Application Meeting:** Select this meeting option if you are considering a Capacity Building grant to increase your capacity to advance community economic development and infrastructure projects.
  - c. **Tax Credit & Capacity Building Program Pre-Application Meeting:** Select this meeting option if you are considering both a Tax Credit grant and Capacity Building grant.
4. Select the date and time that works best for you and any colleagues that you may want to join you for the meeting.
5. Enter in your contact information (name, email, phone number), organization, and the names and email addresses of any additional meeting participants. You can also enter specific questions or topics you would like to discuss in the notes box.
6. If the information is available, fill out the optional questions to provide CDFA staff additional insight on your project to help guide your pre-application meeting. Optional fields request information such as project location and timeline, and a brief description of your project.
7. Hit the “Book” button at the bottom of the page. You will receive a meeting notification in your email shortly.
8. Send the meeting notification / calendar invitation to all those within your organization that you would like to participate.