



COMMUNITY DEVELOPMENT FINANCE AUTHORITY

MANAGING YOUR CDFA TAX CREDIT AWARD

AGENDA

Tax Credit Implementation Guide

How the Tax Credit Works

Tax Credit Administration Timeline

Managing your Grant in GMS

Additional Resources / Q&A



TAX CREDIT PROGRAM

IMPLEMENTATION GUIDE

For additional program details or questions contact:
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August 6, 2025

Hello!
my name is

Name
Organization

TAX CREDIT TEAM



Maureen Quinn

Justin Parker

Scott Maslansky

Betsy McNamara

Nate Olson

Molly Donovan

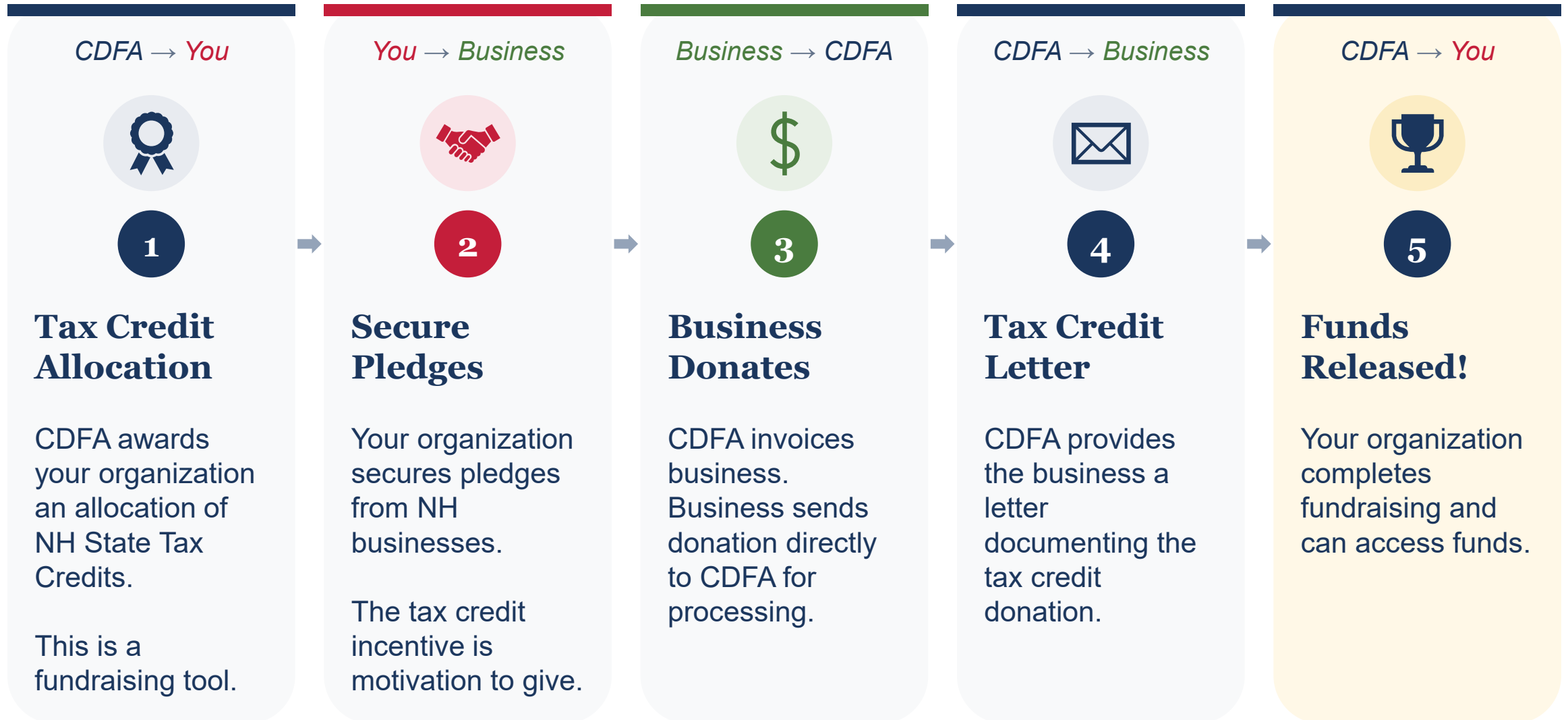
Kirsten Barton

HOW THE TAX CREDIT WORKS

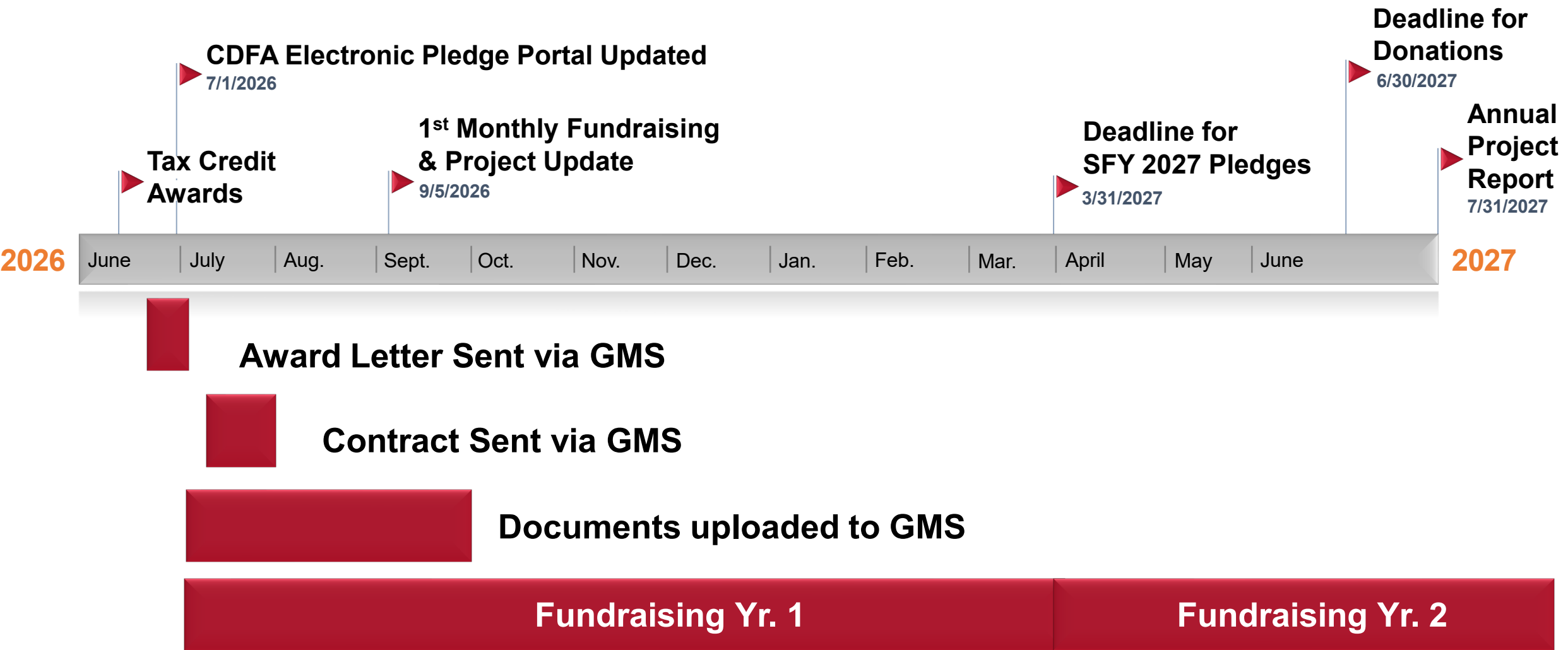
How Tax Credits Work: 5 Steps

Tax credits are different from a grant — here's how the process unfolds.

● CDFA ● You ● Business



GRANT ADMINISTRATION TIMELINE (Yr. 1)



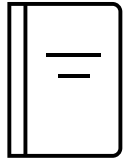
GRANT ADMINISTRATION TIMELINE (Yr. 2)



Fundraising Yr. 2

Disbursements
(once all pledges fulfilled)

IMPLEMENTATION RESOURCES



IMPLEMENTATION GUIDE



RESOURCE LINKS



RESOURCE HUB WEBSITE



QUESTIONS?

GRANT ADMINISTRATION



DOCUMENT CHECKLIST



CORRESPONDENCE / CONTRACT



STATUS REPORTS



DONOR MANAGEMENT



CLAIMS

NAVIGATING TO A GRANT

TEST Nate TEST Olson
Tester
Tester Role

Dashboard >

Funding Opportunities >

Applications >

Grants >

Reports >

My Profile >

Grant
List of all current Grants

[Back](#) [Print](#) [Online Help](#) [Saved Search](#) [Log Out](#)

Current Grants Closed Grants Search Claims

36719-2027 and 2028 Investment Tax Credits

Current Grants

All active grants are listed below.

Search: 2026

ID	Status	Year	Title	Organization	Program Area	Funding Opportunity	Start Date	End Date	Grant Amount	Total Paid	Remaining Balance	Percent Spent
36914	Underway	2025	TEST Project Title	Test Organization	CDIP-Investment Tax Credits	34981-Capacity Building Program for SFY 2026 Tax Credits			\$0.00	\$0.00	\$0.00	.00%
36743 - Copy	Underway	2026	TEST - Copy	Test Organization	CDIP-Investment Tax Credits	36719-2027 and 2028 Investment Tax Credits			\$8,000.00	\$0.00	\$8,000.00	.00%
36743	Underway	2026	TEST	Test Organization	CDIP-Investment Tax Credits	36719-2027 and 2028 Investment Tax Credits			\$100.00	\$0.00	\$100.00	.00%
34913	Underway	2026	TEST	Sample Organization	CDIP-Investment Tax Credits	36719-2027 and 2028 Investment Tax Credits	07/01/2025	06/30/2030	\$800.00	\$0.00	\$800.00	.00%
32398	Underway	2024	TEST	New Hampshire Community Development	CDIP-Investment Tax Credits	32186-Community Economic Development Capacity Building	07/01/2024	12/31/2026	\$0.00	\$0.00	\$0.00	.00%

NAVIGATING INSIDE A GRANT

**Grant**
List of all current Grants

[Back](#) [Print](#) [Online Help](#) [Saved Search](#) [Log Out](#)

 **34913 - TEST - 2026**

Status: Underway

Program Area: Investment Tax Credits

Funding Opportunity: 34900-2026 and 2027 Investment Tax Credits

Organization: Sample Organization

Grantee Contact: TEST Nate TEST Olson

Project Manager: Nate Olson

Available to Project: \$800.00

 **Grant Components**

The grant forms appear below.

Component	Last Edited
General Information	Aug 8, 2025 1:50 PM - Nate Olson
Document Checklist	Aug 6, 2025 1:41 PM - TEST Nate TEST Olson
Contract	
Correspondence	
Status Reports	
Donor Management Activity Budget	Aug 8, 2025 1:51 PM - Nate Olson
Claims	
Encumbrances	
Project Information	Dec 3, 2024 12:37 PM - TEST Nate TEST Olson
Funding Opportunity	-
Application	-

[Preview Grant](#)

DOCUMENT CHECKLIST

Grant List

Genera

Docume

Contra

Corres

Status

Donor

Claims

Encumb

Projec

Document Checklist

Current Version

Staff Milestone Checklists

Contract executed:

yes

All pledges sold:

no

Met requirements for 1st Claim:

no

Met requirements for Final Claim:

no

Met requirements for closeout:

no

✓ Mark as Complete

Last Edited By: TEST Nate TEST Olson - Aug 6, 2025 1:41 PM

Documents Checklist

Grid

✓ Mark as Complete

Edit Grid

Document	Required	Upload	Description	Staff Verified
GENERAL DOCS				
Certificate of Authority (Notarized)	✓	Blank Doc.docx		
SECURITY DOCUMENTS				
Mortgage lien (Recorded at Registry)	N/A	Blank Doc.docx		
UCC (Filed with Secretary of State)	✓			
Promissory Note (Notarized)	✓	Blank Doc.docx	Look at this blank doc	✓

TAX CREDIT CONTRACT

Key Information:

- Tax Credit Allocation
- Fundraising timeline
- Reporting requirements
- Performance Lien
- Disbursement (“Claims”)
- Project Outcomes

34913 - TEST - 2026

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Organization: Sample Organization

Grantee Contact: TEST Nate TEST Olson

Project Manager: Nate Olson

Available to Project: \$800.00

Grant List

Genera

Docume

Contra

Corres

Status

Donor

Claims

Encumb

Projec

Contract

ID	Template	Type	Status
34913 - 001	Tax Credit-Award Letter	Award Letter	Approved
34913 - 002	2025 Award Letter - CDFA Fundraising First Year	Award Letter	Executed
34913 - 003	2025 Award Letter - CDFA Fundraising First Year	Award Letter	Submitted
34913 - 004	Tax Credit-Contract	Grant Contract	Submitted

← Previous

CORRESPONDENCE

- Official communication record
- Contracts and documentation communications
- Donor instructions

Note: Each Correspondence sent in GMS will also send a notification email from do-not-reply@nhcdfagrants.org

Replies outside of GMS will not reach us unless you include a direct staff email address.

STATUS REPORTS

Monthly Fundraising & Project Update

Annual Status Reports

Final Report

 Funding Opportunities >

 Submitted Applications >

 Reviews >

 Grant Tracking >

 Status Reports

ID

Type

Status

Title

Reporting Period

Due Date

36743 - Copy - 004

Final Report

Editing

Tax Credit Final Status Report - TEST

-

36743 - Copy - 005

Tax Credit Annual Status Report

Editing

Test Org. Annual Report July 2027

07/01/2026 - 06/30/2027

07/31/2027

36743 - Copy - 006

Monthly Fundraising and Project Update

Editing

08/01/2026 - 08/30/2026

09/05/2026

FUNDRAISING & PROJECT UPDATES

Status Report Details

Withdraw

Copy

Notes (0)

Feedback

Edit Status Report

36743 - Copy - TEST - Copy - 2026

Status Report Details

Funding Opportunity:

36719-2027 and 2028 Investment Tax Credits

Program Area:

Investment Tax Credits

Status:

Editing

Status Report Number:

006

Status Report Type:

Monthly Fundraising and Project Update

Reporting Period:

08/01/2026 - 08/30/2026

Initial Submit Date:

Initially Submitted By:

Last Submit Date:

null

Last Submitted By:

Approved Date:

Approved By:

FUNDRAISING REPORTS

Status Report PreviewAttachmentsAlert HistoryMapVersions

Status Report Details

Withdraw

Copy

Notes (0)

Feedback

Preview Status Report

NOTE: RE: The Tax Credit Annual Goals Report, Final Status Report, and Monthly Fundraising Reports; in order to pull detailed goals into the form, be sure to copy from the previous report. For the Final Status Report, copy from the latest Annual Status Report (it's the same form).

Status Report cannot be Submitted Currently

Status Report components are not complete

Grant is in Wrong Status

Component	Complete?	Last Edited
General Information	✓	Jul 7, 2026 2:49 PM - Scott Maslansky
Monthly Fundraising & Project Update		Jul 7, 2026 2:57 PM - Scott Maslansky

FUNDRAISING REPORTS

Monthly Fundraising & Project Update - Current Version

Fundraising Update

Fundraising Status*:

Ongoing

Ongoing

Completed current fiscal year fundraising

CDFA is Fundraising this Fiscal Year [Capacity Building Only]

Select file

Fundraising Tracker

Sample Fundraising Tracker

Upload Fundraising Tracker:

Fundraising Narrative

Briefly, provide any additional information about your fundraising outreach and progress.

:

2000 character(s) left

Project Update

Project Implementation Update

Provide a brief update about the implementation/construction of your project noting any key milestones, timeline/budget changes, and/or obstacles.

✖

2000 character(s) left

FUNDRAISING REPORTS

[illegible]

STATUS REPORTS

Monthly Fundraising Reports

- Due September 5th and every month thereafter.
- Share your tracking of prospects
- Provide updates on project implementation progress and obstacles

Annual Status Report

- Due July 31 each year grant is active:
- Updates your project's Progress, timeline, Budget, Obstacles over the last 12 months.
- Upload Annual Report for your organization
- Upload most recent audited financial statements for your organization

Final Status Report

- Due within 30 days of when project is substantially complete
- Summary of progress towards outcome measures
- Data input of proposed outcomes vs. actual outcomes achieved to-date
- Upload Annual Report for your organization
- Upload most recent audited financial statements for your organization

AMENDMENT REQUESTS

Changes in Scope, Location, Budget, Outcomes, Allocation year, etc.



Pause for Questions?

DONOR MANAGEMENT

Total Award Amount:	\$200,000.00
Total Pledge Received:	\$100,000.00
Balance to Raise:	\$100,000.00
Fee Percentage:	20.00%
Net Award Amount:	\$160,000.00
Available to Project Before Payments:	\$8,000.00

Last Edited By: Scott Maslansky - Aug 7, 2025 10:43 AM

Donor Management - Multi-List

Donor	SF Year	Pledge Amount	Pledge Date	Pledge Due Date	Pledge Fee Amount	Donation Type	Amount Received 1	Received Date 1	Amount Received 2	Received Date 2	Amount Received 3	Received Date 3	Total Amount Received	Donor Tax Credit Deduction	Balance Due on Pledge	Receipts Net of CDFA Fee	Signed Pledge Agreement
Donor Test File	2026	\$90,000.00	08/05/2025	09/30/2025	\$18,000.00	Cash - 20%	\$0.00		\$0.00		\$0.00		\$0.00	\$0.00	\$90,000.00	\$0.00	
Donor Test File	2026	\$10,000.00	07/01/2025	08/01/2025	\$2,000.00	Cash - 20%	\$10,000.00	08/01/2025	\$0.00	06/06/2025	\$0.00		\$10,000.00	\$7,500.00	\$0.00	\$8,000.00	
	Subtotal	\$100,000.00			\$20,000.00		\$10,000.00		\$0.00		\$0.00		\$10,000.00		\$90,000.00	\$8,000.00	
		\$100,000.00			\$20,000.00		\$10,000.00		\$0.00		\$0.00		\$10,000.00		\$90,000.00	\$8,000.00	

CLAIMS

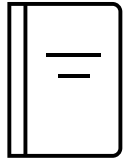
Key components of a claim:

- Signed by the Authorized Representative
- Include all applicable invoices
- Dates of claim, invoices and reporting period are consistent
- Expenses are eligible in relation to your application budget



You must have all pledges secured for your award to submit a claim.

IMPLEMENTATION RESOURCES



IMPLEMENTATION GUIDE

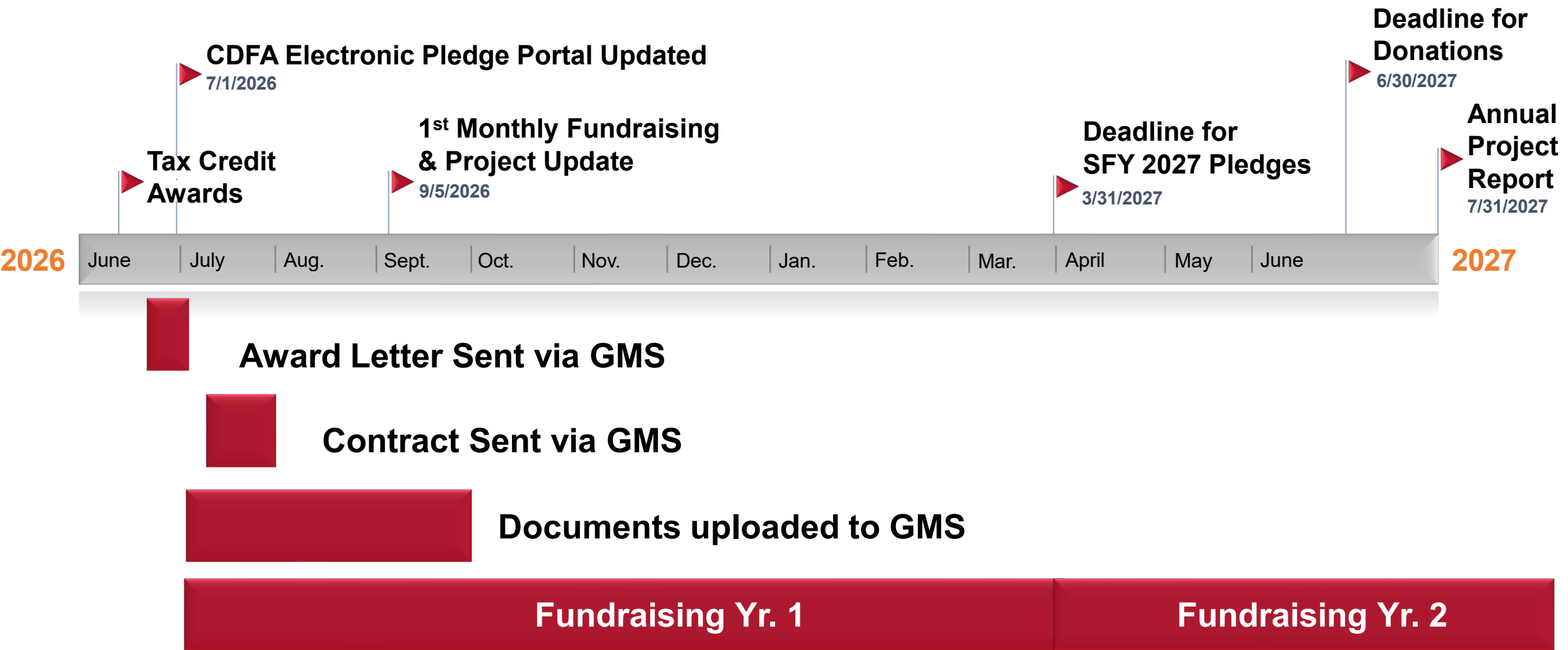


RESOURCE LINKS



RESOURCE HUB WEBSITE

GRANT ADMINISTRATION TIMELINE (Yr. 1)



NEXT STEPS



Email from CDFA
including links to:

Today's presentation and recording
Tax Credit Implementation Guide



Make sure team members are registered in GMS



Jump into fundraising and prepare a document to
track prospects



Upload any missing documentation into the
Document Checklist component of GMS



Questions?

Community Development Finance Authority
www.nhcdfa.org