

Grantmaking Roundtable

June 15, 2017 - Toronto

The Bigger Boulder Room, Centre for Social Innovation, 192 Spadina Avenue

Facilitator: *Patrick Johnston, Borealis Advisors*

Wednesday, June 14, 2017, 6:00 - 9:00pm

Dinner and Icebreaking session – Location TBC

This is an important part of the Roundtable and as such participation is strongly encouraged

Thursday, June 15, 2017, 8:30am to 4:30 pm

- 8:30 AM **Registration** – light refreshments will be provided
- 9:00 AM **Welcome**
- 9:15 AM **The Five Stages of the Grantmaking Cycle**
An overview of the cycle, beginning with establishing the framework
- 9:30 AM **Second Stage: How to Obtain Good Grant Proposals**
How do you prepare yourself to find the proposals that have the best “fit”?
- 10:00 AM Small group discussion
- 10:30 AM Break
- 10:45 AM **Third Stage: Making the Grant**
How do you screen proposals, do site visits and make good decisions on grants?
- 11:15 AM Small group discussion and report back
- 12:15 PM Break
- 12:30 PM **Lunch: Case Study Conversation**
- 1:30 PM **Fourth Stage: Managing Your Grants**
What’s the best way to manage your grants effectively?
Guest Speaker: Anil Patel, Co-founder, Digital Strategy, Grantbook
- 2:45 PM Small group discussion
- 3:15 PM Break
- 3:30 PM **Fifth Stage: Closing the Grant**
What’s the most effective way to evaluate lessons learned and to plan your exit?
- 4:00 PM Small group discussion and report back
- 4:30 PM **Final Thoughts and Close**