Day Four Projects

WISE GRANT COLLABORATION

Evaluation of the WISE Grant 2.0 Collaboration

Prepared by Day Four Projects
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Content

Acknowledgement.

In the spirit of reconciliation Day Four Projects acknowledges the Traditional Custodians of country throughout Australia and their connections to land, sea and community. We pay our respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

We would also like to acknowledge and thank all those who contributed their time and expertise to this evaluation.

Executive Summary

This report presents the findings of an evaluation of the Work Integration Social Enterprise (WISE) Grant 2.0: a collaborative, multi-funder initiative designed to strengthen social enterprises that create jobs and employment pathways for Australians facing barriers to mainstream employment. WISE 2.0 builds on the earlier WISE 1.0 Grant Round and reflects both accumulated learning and changing sector conditions, including increased financial pressure on social enterprises and growing interest in coordinated funding approaches.

WISE 2.0 was delivered through a partnership of philanthropic organisations who pooled funding, governance, and assessment processes to provide more coordinated and streamlined support to the WISE sector. Compared with WISE 1.0, the round incorporated several deliberate changes, including a stronger focus on financial resilience among social enterprises, a more targeted and nomination-informed application pathway, updated assessment frameworks, and strengthened collaboration practices among partner organisations.

The evaluation draws on partner organisation and advisory group interviews and an applicant survey, combining qualitative and quantitative analysis against the Key Evaluation Questions. Overall, findings indicate that WISE 2.0 performed strongly across applicant experience, process design, and collaboration quality.

Applicants reported consistently positive experiences of the grant process. Survey respondents rated communications, clarity of information, and process streamlining highly across both Stage One and Stage Two of the WISE 2.0 initiative. Applicants frequently described the process as clear and proportionate. The Social Enterprise Stages Matrix was widely valued as a framing tool, though some applicants reported difficulty when their organisation sat between stages.

The collaboration model among Partner Organisations was a central strength. Partners described the collaboration as high trust, well facilitated, and learning-rich, with strong coordination and meeting discipline supporting effective joint decision-making. Participation generated benefits beyond grant allocation, including funder capability development, strategy influence, and network expansion. The Social Enterprise Advisory Group was seen to add valued sector perspective to grant design.

The evaluation also identified areas for review and potential improvements, including revisiting the alignment between eligibility criteria and grant intent (and how this is communicated to applicants), how legal and governance processes may be further streamlined for partner organisations, reviewing assessment moderation protocols to ensure full transparency in assessment procedures, and considering a more explicit conflict-of-interest process for Advisory Group members.

Overall, WISE 2.0 demonstrates that a well-facilitated collaborative funding model can deliver strong applicant experience and partner value while supporting more coordinated sector investment. The recommendations in this report are designed to strengthen future potential rounds and inform other collaborative funding initiatives that may seek similar results.

Introduction

The Work Integration Social Enterprise (WISE) Grant 2.0 was established to strengthen and support social enterprises whose primary purpose is to create jobs, skills, and employment pathways for Australians facing barriers to mainstream employment. These enterprises play an important role in building a more inclusive economy by combining commercial activity with intentional social impact, particularly for people who are excluded from or underserved by traditional labour markets.

The WISE Grant 2.0 builds on the experience and learning from the earlier WISE Grant 1.0 round and continues to operate through a collaborative funding partnership model. The collaboration brings together Greater Melbourne Foundation, Macquarie Group Foundation, McLean Family Fund, Minderoo Foundation, Paul Ramsay Foundation, The Brian M. Davis Charitable Foundation, The Honig Foundation and Westpac Foundation. Since its inception, the collaboration has also been supported by pro bono legal and governance advice from MinterEllison, helping to ensure strong and fit-for-purpose governance arrangements.

Through this partnership approach, participating organisations recognise both the economic and social contribution of WISE and the value of working collectively to support the sector. By pooling funding, knowledge, and networks, Partner Organisations aim to provide a more coordinated, accessible, and streamlined funding pathway for WISE. Consistent with the intent of WISE 1.0, WISE 2.0 sought to reduce fragmentation in funding processes while strengthening the financial sustainability, organisational resilience, and long-term impact of WISE across Australia.

Since the WISE 1.0 Grant Round, the operating context for the initiative has evolved. The collaboration itself has changed, with new Partner Organisations joining and some original partners concluding their involvement. Broader sector conditions have also shifted, influencing both funding priorities and the design of the second round. In response, WISE 2.0 adopted a modified application approach, including a nomination pathway alongside applications from selected organisations and prior WISE recipients. At the same time, the overall purpose and intent of the initiative remained consistent.

This evaluation was commissioned to capture and examine the experiences and perspectives of those involved in WISE 2.0, including Partner Organisations (both new and continuing), successful and unsuccessful applicants, and members of the Social Enterprise Advisory Group. The evaluation revisits and applies the original Key Evaluation Questions to this second round, with a focus on understanding what has worked well, what has been challenging, and where the model has created value for applicants, partners, and the broader ecosystem.

The findings are intended to inform future WISE Grant Rounds and to contribute practical learning for collaborative funding initiatives more broadly; particularly those seeking to strengthen partnership approaches and build more effective, responsive support for social enterprises.

Key Evaluation Questions

The following 6 Key Evaluation Questions were developed collaboratively with WISE Grant 2.0 Partner Organisations, and focus on various elements of the design, implementation and effects of the collaborative grant process:

1. What were the processes involved in administering the grants (e.g. communication, application forms, supporting information) and how were these experienced by Grant Applicants at either/or both the Application stage (Stage 1) and Shortlisted stage (Stage 2)?

2. What changes were made to WISE 2.0 based on the experiences of WISE 1.0, and what were the effects of these changes?
3. What ongoing and new structures and processes were put in place to build a collaboration amongst Partner Organisations? How were these structures and processes experienced by Partner Organisations?
4. What challenges were experienced by Grant Applicants, Grant Recipients and Partner Organisations contributing to the grant? What other benefits to Partner Organisations, individually or collectively, did this collaboration foster? Any benefits to the broader sector or at the ecosystem level?
5. How could the process be improved for Grant Applicants and Partner Organisations contributing to the grant?
6. To what degree were the intended grant outcomes achieved for Partner Organisations and Grant Applicants? In what ways did the collaboration contribute to those outcomes?[1]

Methods

To address the above questions, this evaluation employed the following methods (see Annex for all data collection tools used in this evaluation):

- **Interviews with Partner Organisations**: a group interview with Partner Organisations involved in WISE 1.0 and who were also involved in WISE 2.0 was conducted online. This interview explored processes involved in developing and administering the WISE 2.0 initiative; key changes made between WISE 1.0 and WISE 2.0, the collaborative approaches in place to foster relationships among Partner Organisations, and challenges encountered/opportunities for improvement. This interview included 5 individuals from 4 Partner Organisations

- **Interviews with new Partner Organisations**: these interviews focused on the experiences of new Partner Organisations and were conducted as 1:1 online sessions. Interviews explored similar features to the Group Interview (outlined above), as well as Partners' experiences of being onboarded into the collaboration. Four interviews were conducted with new Partner Organisations.

- **Interview with the Social Enterprise Advisory Group**: an online interview was conducted with members of the Social Enterprise Advisory Group which examined the role, perceived value, challenges and new opportunities for this group (and similar advisory groups). Three Social Enterprise Advisory Group members participated in this interview.

- **Social Enterprise Applicant Survey**: a short online survey was distributed to three categories of Social Enterprises participating in the WISE 2.0 Grant Round: (1) successful applicants; (2) shortlisted applicants; and (3) nominated applicants. The survey contained questions related to perceptions of application processes and materials, communications, and supports (including the Social Enterprise Stages Matrix), perceived benefits for applicants, as well as opportunities for strengthening the experience for applicants. In total, responses were received from 12 Social Enterprises, with 10 complete responses (from a total of 36).

[1] Note: outcomes in this context do not relate to the outcomes generated by Grant Applicants. Instead, outcomes relate to elements such as simplified and streamlined access to philanthropic support for Grant Applicants, stronger philanthropic networks among Partner Organisations, and increased understanding and knowledge of collective funding approaches among Partner Organisations. Results generated by Grant Applicants as a result of funding through WISE 2.0 are beyond the scope of this evaluation.

Data from the above sources were analysed and synthesised using appropriate methods, including basic descriptive statistics for quantitative survey data, and thematic coding of findings from interview transcripts (guided by the above KEQs).

Findings

This section presents the integrated evaluation findings for the WISE 2.0 Grant Round and its associated multi-funder collaboration model. Broadly, evaluation findings suggest that: WISE 2.0 delivered a highly regarded and comparatively low-burden applicant process; communications and support were consistently rated strongly; the Social Enterprise Stages Matrix was widely valued; collaboration among funders was experienced as high-trust and high-learning; and the redesign from WISE 1.0 was material and largely effective. The findings also identify areas for review and potential improvement, including related to clear eligibility signalling, advisory group participation, assessment transparency, and collaboration resourcing. These findings are detailed below, with survey results also provided in Table 1.

1. Grant administration processes and applicant experience

Stage One application design and communication quality

The Stage One application process in WISE 2.0 was designed to be clear, structured, and proportionate in applicant burden. Both Partner Organisation and Advisory Group interviews confirm that reducing unnecessary effort and improving clarity were explicit design objectives, informed by reflection on WISE 1.0 and broader sector feedback related to grant application fatigue.

The quantitative applicant survey results indicate that these design intentions translated into a positive applicant experience. Respondents rated the quality of Stage One communications at a median of **9 out of 10**, with all respondents agreeing or strongly agreeing that the application process was simple and streamlined. A similarly high proportion agreed that the information provided directly assisted their application. Reported support levels during Stage One were also positive, with a median rating of **7.5 out of 10**. However, we note that these results are from a small sample, and may not be representative of all Grant Applicant experiences.

Qualitative applicant comments reinforce these results. Applicants described Stage One materials as clear, well explained, and appropriately detailed. Several noted that expectations were transparent and that the process compared favourably with other grant rounds they had experienced. This comparative framing is important: respondents were satisfied with the process, and relative to an often burdensome grant landscape. As described by one applicant:

"A very seamless process and clear and concise communications."

Evidence from Partner Organisation interviews confirms that this outcome was intentional rather than incidental. Partners described deliberate efforts to sharpen criteria, streamline submission forms, and remove unnecessary complexity. In this respect, WISE 2.0 demonstrates that multi-funder rounds can aim to be both rigorous and low-burden when process design is treated as a priority outcome.

At the same time, survey responses from applicants identify a small but meaningful refinement opportunity. A minority of applicants perceived some tension between eligibility criteria and the descriptive language used to characterise the purpose of the grant, particularly regarding organisational maturity and whether the round primarily targeted stabilisation, restructuring, or growth-stage enterprises. This suggests confusion for some, which may warrant a review of instructional materials and messaging for future rounds. Several applicants also expressed interest in optional clarification channels, such as brief phone consultations, to test assumptions before investing application effort.

The Social Enterprise Stages Matrix

The Social Enterprise Stages Matrix was a distinctive feature of the WISE 1.0 and WISE 2.0 application designs and played a dual role: supporting applicant self-assessment and structuring funder assessment. Survey results show that applicants in WISE 2.0 rated the usefulness of the Matrix at a median of **8.5 out of 10**, indicating strong perceived value.

Qualitative feedback shows that many WISE 2.0 applicants found the Matrix helpful in framing their organisational stage and focusing their responses. Respondents described it as practical and accessible rather than bureaucratic, and several noted that it reduced narrative burden by providing a shared diagnostic framework:

"A really good guide for analysis of your organisation."

However, a recurring theme in qualitative responses was boundary ambiguity. Several applicants reported that their organisation appeared to sit between stages or met criteria across categories, making classification difficult:

"We spent a bit of time on this and felt we were in between two categories."

"Useful but some ambiguity as organisations were in between stages."

This does not undermine the Matrix's value but suggests that additional worked examples or boundary guidance would improve utility and user confidence (recognising that a singular tool for measuring organisational maturity is unrealistic). Partner interviews confirm that the Matrix also strengthened internal assessment consistency, suggesting that it delivered value across both sides of the process.

Stage Two shortlisting experience

Stage Two shortlisting processes were also rated positively. Survey respondents who progressed to Stage Two rated communications at a median of **9 out of 10** and support at **9.5 out of 10**, with unanimous agreement that the process was simple and streamlined. Qualitative responses emphasised clarity of documentation requirements, predictability of follow-up requests, and the value of having a named contact point. Applicants described Stage Two as structured and transparent, reducing uncertainty and administrative friction:

"It was easy to understand and provide all documents."

"Follow up requirements were very clear."

The primary improvement suggestion at this stage concerned the depth and explanatory quality of feedback to unsuccessful applicants. Some respondents indicated that feedback could more fully explain assessment reasoning. This may suggest an opportunity to review feedback depth and processes, while maintaining the strong structure already in place.

2. Evolution from WISE 1.0 to WISE 2.0

Interview evidence makes clear that WISE 2.0 represented a substantive redesign rather than an incremental update. Partners and advisors consistently described WISE 2.0 as strategically reframed and operationally rebuilt in response to WISE 1.0 evaluation findings and changing sector conditions. Importantly, this was done in collaboration with all Partner Organisations, including those new to the collaboration:

"We really did get to shape the grant, and I thought we were going to just use a boiler plate. That was a really great thing. And we could influence it. Everyone was really open to that and receptive to that."

A defining feature of WISE 2.0 was the depth and intentionality of collaboration among Partner Organisations. The collaboration was not limited to co-funding or parallel decision-making; rather, it functioned as a genuinely shared design and governance model in which partners collectively shaped the purpose, criteria, assessment approach, and final allocation decisions of the grant round. Across interviews, this model was consistently described as both demanding (participants repeatedly noted the time required to shape the grant, as well as reach agreement and consensus) and highly valuable: producing stronger decisions, deeper sector understanding, and greater shared ownership of outcomes than may have been possible through single-funder processes.

The most significant change reported by Partner Organisations was a **strategic pivot in grant purpose**. WISE 2.0 sought to shift emphasis away from growth and scale toward financial resilience and sustainability, reflecting sector stress signals and discussions at the 2025 Social Enterprise Jobs Summit. Partners described this as a deliberate repositioning designed to support enterprises facing financial fragility rather than expansion opportunity.

"This round was all about financial resilience, we parked the impact."

Practically, this had flow on effects, particularly in the size of grants that were issued and the number of Social Enterprises that were supported:

"We kept going around in circles and we landed on: let's broaden the number of providers and ... lower the amount. So we decided to give more grants, at a slightly lower amount."

Operationally, WISE 2.0 also introduced a targeted and nomination informed model, rather than an open grant round. This meant that WISE 1.0 recipients were invited to apply, while each Partner Organisation was able to nominate up to 5 Social Enterprises for consideration. Partner Organisation interviews indicate that this decision was driven by two factors: a desire to reduce wasted applicant effort and recognition that funders already had visibility across a large portion of the WISE landscape. Partners described this as a pragmatic and ethical decision in a constrained funding environment, though they also acknowledged that nomination models require careful expectation management.

WISE 2.0 also incorporated multiple process improvements relative to WISE 1.0, including updated grant software platforms, refined scoring frameworks, paired assessment processes, and revised MOUs. Partners repeatedly described these changes as strengthening process robustness and usability, though legal documentation processes remained resource intensive.

One partner described the redesign metaphorically:

"It was like rebuilding a house. They totally rebuilt WISE 2 from 1."

These changes produced observable effects: faster process flow, stronger assessment structure, and better targeting of financially vulnerable but viable enterprises. However, partners noted that communicating the strategic shift (from growth to sustainability) clearly to applicants under compressed timelines was challenging:

"The Social Enterprises didn't pick up on those signals as much as we hoped, most of them were like 'we're great and this is our plan"

While this evaluation has not been able to explore the degree to which Social Enterprises feel conditioned to focus on growth planning in funding applications, insights from the Social Enterprise Advisory Group suggest that it was an important pivot for the WISE Grant:

"It was the right time, the right context, to be very clear about financial sustainability as the driver."

In reflecting on this pivot, Partner Organisations acknowledged that clearer and earlier communication to the sector may be helpful in ensuring applicants were aware of the change, and had clarity regarding the information that was of most importance to the assessment process.

3. Collaboration model performance and experience

Partner Organisations described the collaboration as structured but relational. Formal elements, such as MOUs, assessment frameworks, paired reviews, and structured decision meetings, were seen as important enablers, but Partner Organisations repeatedly emphasised that the collaboration worked because of trust, tone, and facilitation quality. Several partners noted that the credibility and relationships built through WISE 1.0 created a foundation that allowed WISE 2.0 to move more quickly and with greater understanding of each other's contexts. There was a sense that participants entered the process expecting (and experiencing) good faith engagement and evidence-based disagreement, rather than positional negotiation:

"There was healthy disagreement... everyone made their case in a clear-eyed way and in good faith."

Another reflected that the collaboration climate made robust discussion possible without conflict escalation:

"It was an open environment... it didn't feel like there was anything you couldn't say."

This underscores an important lesson: collaboration effectiveness was enabled by the spirit in which partners approached their work together, as well as the formal structures that governed their collaboration. Meeting design, facilitation style, preparation discipline, and documentation quality were repeatedly cited as critical success factors. Central coordination, which included agenda setting, minute-taking, document circulation, and timeline management, functioned as enabling infrastructure rather than administrative overhead.

Multiple partners singled out coordination quality as decisive:

"The comms were outstanding... minutes were always excellent... we were always given timelines."

"Meetings were really well chaired... brought discussions to a decision point and to a conclusion."

This pattern suggests that collaborative pooled funding models require **dedicated process stewardship (as highlighted in the first WISE 1.0 Evaluation Report) to bring clarity and momentum to collaborative work**. Where this function is strong, as in the case of WISE 2.0, collaboration is experienced as energising and productive.

The collaboration also brought together partners with differing levels of prior experience in WISE and funding of the social enterprise sector. For newer or smaller funders, participation functioned as an accelerated learning environment. These partners reported gaining exposure to assessment frameworks, financial analysis approaches, and sector risk signals that they would not have developed independently. Several described directly adapting WISE tools and frameworks into their own grant making practice:

"It's been an eye opener on how you approach a grant round... it's helped us with some of the evaluation frameworks we use."

This indicates that WISE 2.0 generated value not only through delivering grant support to Social Enterprises, but also through building **funder capability development** (which is not always seen as a benefit of collaborative funding models).

The Social Enterprise Advisory Group added an additional layer of participatory design to the collaboration. Advisory participants described the experience as "unusual" and "positive", noting that grant programs aren't always shaped with direct end-user input. Their role in testing language, criteria framing, and practical applicability was widely valued by both advisors and Partner Organisations:

"It's great that there's consultation for the end users — often that isn't the case."

At the same time, advisory interviews highlighted two potential areas for review and refinement that may strengthen the model: (1) earlier involvement in the ideation phase (rather than being presented with a well-developed model), and (2) a discussion and review of conflict-of-interest issues where advisors may also be applicants. These are design-tuning insights rather than criticisms, and they reinforce the underlying value of participatory grant design.

4. Challenges, tensions, and benefits

While the collaboration model was widely regarded as successful, interviews make clear that it was neither effortless nor frictionless. A consistent theme was the **real cost of deep collaboration** in time, cognitive load, and organisational resources. This was particularly evident for smaller foundations or those without dedicated program staff. Several partners described balancing collaboration commitments alongside core responsibilities, sometimes with strain:

"It was time intensive... for a small organisation I felt guilty in not having contributed as much as there was an expectation."

This suggests that collaboration depth and decision quality increase with participation intensity, but participation intensity often has unequal cost across organisations. Designers of collaborative funding approaches may wish to explicitly recognise this and consider tiered participation roles or shared resourcing models to sustain inclusiveness without overburdening smaller partners.

Governance and legal processes, particularly MOUs and giving letters, were another recurring area of discussion among partners. While partners understood the necessity of formal agreements in pooled funding models, the process to develop and adopt suitable legal instruments were widely described as slow and administratively heavy (but considered to be important and necessary). While WISE 2.0 was able to draw on the MOU established in WISE 1.0, the addition of new funders meant that the MOU had to be reviewed and revised to consider their needs and requirements. As described by partners, this "took some navigating", including changes to governance approaches, permissions required, and changes to the Giving Letter. Newer partners unfamiliar with WISE 1.0 found these processes especially demanding. Several interviewees suggested that earlier legal alignment, template standardisation, or pre-cleared frameworks could go some way in reducing future challenges.

Another analytically important theme concerned **assessment integrity and decision dynamics**. WISE 2.0 used structured application processes (including document requests for short listed applicants), scoring frameworks and paired assessments, which partners generally viewed as robust and appropriate. However, one partner observed that in final deliberations, structured scores sometimes gave way to relational knowledge and prior experience with organisations. While decision making often requires a practical approach, informal use of relational knowledge and prior organisational experience may introduce potential transparency and fairness risks if not explicitly integrated into the assessment model.

As one partner described:

"We had the result from the evaluation, and then we pushed that to one side and had a discussion around what we knew about that organisation."

For designers of grant rounds, the implication is not that relationship knowledge should be excluded, but that its role should be **acknowledged and structured** within decision frameworks. This would enable partners, and applicants, to be fully aware of processes and where different sources of evidence are used and are useful.

Timeline compression emerged as another cross-cutting challenge. The Social Enterprise Jobs Summit and broader sector stress signals triggered strategic reframing and urgency, leading to condensed timelines and adaptive process shifts. Partners described the collaboration as agile and responsive under these conditions, but also noted the pressure created by late-stage design adjustments and tight turnaround periods.

"The focus was changed quite last minute... the timeline was condensed a lot."

As noted above, this had flow on effects to how grant parameters were communicated to applicants. The design lesson is that adaptive responsiveness is valuable, however it requires similar adjustments for partners and applicants to be effective.

Alongside these challenges, the collaboration produced significant secondary benefits. Partners reported that working together deepened cross-funder trust, surfaced shared concerns about WISE sustainability, and created new pathways for future co-funding and coordination. Several described the collaboration itself as a legacy asset, and a model worth sustaining beyond this round.

"We've built a framework and a process; how can this continue?"

5. Outcome achievement and contribution of collaboration

Across all data sources, evidence indicates that WISE 2.0 achieved its intended outcomes related to applicant experience, partner organisation value, and collaboration performance. Applicant survey data shows consistently strong ratings across communication quality, process clarity, support, and streamlining: all of which were clearly signalled intentions of the WISE 2.0 Grant Round. Median ratings between 8.5 and 9.5 out of 10 across core measures indicate a process that worked well in practice, not just in design.

Qualitative survey data highlighted that applicants felt respected, informed, and not overburdened. In a sector where application fatigue is common, this is a meaningful outcome, and is likely to build sector trust and willingness to engage in future rounds (if held).

Partner Organisations also reported important outcomes beyond grant allocation. Participation in WISE 2.0 influenced organisational strategy, sharpened assessment practices, expanded networks (with Partner Organisations and Social Enterprises), and deepened understanding of sector fragility and financial resilience dynamics. For newer partners especially, the collaboration functioned as a practical learning laboratory:

"Opening up the network and getting under the hood of a lot of organisations has been exactly what we wanted to do."

The collaboration model itself contributed to outcomes. Pooled funding increased scale and flexibility. Multi-perspective assessment improved judgment quality. Sector-informed design (through both Partner Organisation experience and Advisory Group input) increased practical relevance. Crisis-responsive reframing improved targeting toward financially vulnerable but viable enterprises.

Applicants recognised and valued the collaborative model:

"When funders collaborate, support is more coordinated and often goes further — it can mean larger grants, longer-term backing, and less duplication in paperwork."

"Grant rounds that bring funders together can increase the pool of available funding, enabling WISEs to pursue larger, more ambitious initiatives."

Survey respondents also noted benefits related to visibility and relationship-building with funders, as well as shared understanding of impact costs and outcomes. However, a minority view indicated that collaboration among funders was not always visible in practice:

"...we never met or interacted with most of the funders in the collaboration; which made it feel just like a single-funder grant."

This suggests that while the collaborative model is strongly endorsed, making collaboration more visible to applicants may further strengthen perceived value.

The evaluation findings suggest that the quality of collaborative processes, relationship building, stewardship, and structured decision-making were linked to the collaborative architecture and facilitation discipline. Future rounds that preserve these elements, while continuing to strengthen governance clarity, resourcing, and assessment transparency, are likely to maintain or exceed current performance.

Table 1: Survey Results

<table>
<tr><th colspan="5">Element</th><th>Median (range)</th><th>N</th></tr>
<tr><td colspan="5">On a scale of 1-10, how would you rate the quality of communications from the WISE Grant Program as part of the Stage One Application process?</td><td>9 (6-10)</td><td>10</td></tr>
<tr><td colspan="5">On a scale of 1-10, how useful was the WISE Grant Social Enterprises Stages Matrix in understanding your organisation's current stage of development and areas for change?</td><td>8.5 (5-10)</td><td>10</td></tr>
<tr><td colspan="5">On a scale of 1-10, how would you rate the level of support received during the Stage One Application process?</td><td>7.5 (5-10)</td><td>10</td></tr>
<tr><td colspan="5">On a scale of 0-10, how would you rate the quality of communications from the WISE Grant Program as part of the Stage Two Shortlisting process?</td><td>9 (6-10)</td><td>6</td></tr>
<tr><td colspan="5">On a scale of 0-10, how would you rate the quality of support received during the Stage Two Shortlisting process?</td><td>9.5 (7-10)</td><td>6</td></tr>
<tr><th>Element</th><th>Strongly Agree</th><th>Agree</th><th>Neutral</th><th>Disagree</th><th>Strongly Disagree</th><th>N</th></tr>
<tr><td>The information provided from the WISE Grant assisted my application</td><td>5</td><td>4</td><td>1</td><td>0</td><td>0</td><td>10</td></tr>
<tr><td>The WISE Grant application process was simple and streamlined</td><td>4</td><td>6</td><td>0</td><td>0</td><td>0</td><td>10</td></tr>
<tr><td>The WISE Grant Stage Two Shortlisting process was simple to complete</td><td>3</td><td>3</td><td>0</td><td>0</td><td>0</td><td>6</td></tr>
<tr><td>The WISE Grant Stage Two Shortlisting process was simple and streamlined</td><td>3</td><td>3</td><td>0</td><td>0</td><td>0</td><td>6</td></tr>
</table>

Recommendations

Findings from this evaluation demonstrate that a collaboratively governed, multi-funder grant model can deliver high process quality, strong applicant experience, and meaningful cross-funder learning. Evidence summarised here suggests that the core foundations of the model are sound and effective. The six recommendations offered below focus on strengthening clarity, governance, collaboration sustainability, and assessment transparency, while advocating for continuing the features that worked particularly well.

1. Preserve the high-clarity, low-burden application design

A strength of WISE 2.0 was the high applicant rating of communication clarity, process transparency, and application streamlining (key aims and ambitions of the initiative). Future rounds, and other grant initiatives, would benefit from adopting the elements that contributed to this performance, including structured guidance, clearly scoped questions, staged documentation requests, and disciplined communication cadence. Optional clarification channels, such as short Q&A briefings, webinars, or bookable clarification calls, may help to support applicants with specific questions and requirements, without increasing burden across the applicant pool.

2. Review eligibility and grant intent signalling

Evaluation findings demonstrate that while overall communications were strong, a minority of applicants experienced some ambiguity between formal application criteria and their broader understanding of the grant's purpose. This was made in reference organisational maturity and whether funding was intended primarily for resilience, restructuring, or growth.

It may be worthwhile to review (and tighten if necessary) eligibility statements, purpose descriptions, and grant focus areas to ensure strong and consistent alignment. If strategic pivots are made (such as a shift toward financial resilience from a focus on impact or growth), it is likely beneficial to communicate these early, and repeatedly including through plain-language scenarios and examples. This may assist in improving applicant understanding and expectation setting.

3. Ensure resources are provided for collaboration facilitation and hosting

A consistent cross-partner finding from this evaluation is that collaboration effectiveness depended heavily on good facilitation and coordination (in this case, by the Greater Melbourne Foundation team). Meeting discipline, documentation quality, timeline management, and decision structuring were repeatedly identified as success factors for the collaboration, rather than simple administrative functions (which echoes findings from the WISE 1.0 evaluation report). For any collaborative grant round effort, building in design and budgeting considerations for this coordination and facilitation capacity is important. As seen in this evaluation, this will help to improve partner experiences, make effective use of partner time, and increase the likelihood of collaboration sustainability, particularly if and when the partner group grows or diversifies.

4. Update assessment transparency and moderation processes

The structured assessment frameworks used in WISE 2.0 were widely valued. However, evaluation interviews indicate that in final deliberations, prior knowledge and funder relationships sometimes influenced decisions alongside formal scoring. While contextual knowledge is often legitimate and valuable, its informal use creates potential transparency risks if not addressed. Consider if and how moderation protocols could be developed that clearly describe how scoring results, contextual knowledge, and relationship history are integrated into final decisions. Making this integration explicit will strengthen assessment integrity while preserving the benefits of informed judgment.

5. Retain the Social Enterprise Advisory Group and clarify conflict-of-interest protocols

The Social Enterprise Advisory Group was seen as a strong innovation that improved the relevance of the WISE 2.0 Grant Round to the sector, and helped to strengthen language clarity in design. It is recommended to retain this participatory approach when working with the Social Enterprise sector, and where possible, to consider extending its engagement earlier into the design cycle.

At the same time, it is suggested to review existing conflict-of-interest procedures for advisory group participants (particularly where advisors may also be applicants), so that the potential issue is acknowledged and a clear plan is put in place. Transparent conflict management settings will protect the credibility of the co-design model while preserving its value.

6. Explore how the collaborative platform built via WISE 2.0 may continue and expand in the future

The evaluation found that collaboration among funders was operationally effective for designing and delivering WISE 2.0, and also strategically valuable. Partner Organisations reported gaining new knowledge, shifting their strategies, expanding their networks, and improving their understanding of the Social Enterprise sector as a result of participating in the WISE 2.0 initiative. At the same time, applicants recognised and valued the benefits of coordinated, pooled funding approaches.

It is recommended to consider how Partner Organisation relationships, shared frameworks, and collaboration infrastructure may be maintained into the future, and in ways that build efficiency, trust, and impact over time. Attention may also be given to participation models that allow different levels of engagement intensity so that smaller funders can remain involved without disproportionate burden.

Limitations

This evaluation provides a structured assessment of the WISE 2.0 Grant Round and collaboration model. As with all evaluations of complex, multi-partner initiatives, there are several limitations that should be considered when interpreting the findings and recommendations.

First, the applicant survey achieved a relatively low response rate. The survey was administered during November–December, which is typically a peak period for social enterprises and philanthropic organisations. In addition, there were practical constraints in issuing multiple reminder communications, which likely further reduced response levels. While the survey still generated useful insights (which were triangulated with other data source), the survey results should be interpreted as indicative rather than fully representative of the entire applicant population.

Second, there is uncertainty regarding the future shape and continuity of WISE grant rounds. At the time of this evaluation, it was not confirmed whether future WISE grant rounds will proceed in the same format, shift to a different model, or continue at all. As a result, forward-looking analysis and recommendations in this report are necessarily conditional. They are framed to be useful both for a future WISE round and for other collaborative funding initiatives, but some design recommendations may require adaptation depending on how the WISE collaboration continues.

Third, the evaluation was not able to include direct input from Partner Organisations that participated in WISE 1.0 but did not continue into WISE 2.0. This limits the evaluation's ability to fully understand the reasons for changes in partner involvement, including whether decisions to conclude participation were driven by strategy shifts, resourcing constraints, collaboration experience, or external factors. As a result, findings relating to collaboration sustainability and partner experience are weighted toward the perspectives of continuing and newly joined partners.

Finally, several findings (particularly those relating to collaboration quality, decision dynamics, and governance practice) are based on self-reported interview data from participants. While these accounts were detailed and broadly consistent across sources, they may still be subject to a range of biases (e.g., recall bias, social desirability effects). Triangulation across multiple respondent groups and data types reduces this risk but does not eliminate it.

Taken together, these limitations do not undermine the overall value of the findings, but they do suggest that conclusions should be read as well-supported and practice-relevant rather than comprehensive of all WISE 2.0 experiences.

Conclusions

The WISE 2.0 Grant Round demonstrates that a collaboratively governed, multi-funder pooled funding model can deliver high process quality, strong applicant experience, and meaningful value for both funders and the social enterprise sector. Applicant, partner organisation, and advisory group perspectives highlight that WISE 2.0 was carefully designed and administered, with a consistent emphasis on clarity, proportionality, and coordination.

Applicant feedback suggests that the process was experienced as clear, transparent, and comparatively low burden: a significant achievement in a context where grant application fatigue is common. This process quality should be recognised as a core strength and preserved in any future rounds.

WISE 2.0 also reflects a mature learning response to WISE 1.0. The shift toward financial resilience, more targeted applicant pathways, and strengthened governance and assessment frameworks show adaptive design grounded in evidence and sector context. While compressed timelines created some pressure, the collaboration demonstrated agility and shared ownership in responding to changing conditions.

Partner collaboration emerged as a major outcome in its own right. The model functioned as a pooled funding mechanism as well as a platform for shared learning, alignment, and capability building among partners. Strong facilitation and coordination were critical to this success. The evaluation indicates that collaboration infrastructure should continue to be treated as essential rather than optional in future rounds.

The findings also point to practical refinements that would further strengthen the model, including reviewing eligibility and intent signalling for applicants to ensure a clear understanding, streamlined legal frameworks, explicit assessment moderation approaches, and strengthened conflict-of-interest protocols. These are targeted improvements that build on, rather than challenge, the underlying design of WISE 2.0.

Overall, WISE 2.0 provides a credible and potentially transferable model of collaborative grant making in the social enterprise field. With ongoing refinements from WISE 1.0, it offers a strong foundation for future WISE rounds and a useful reference point for other partnership-based funding initiatives seeking to achieve coordinated and inclusive impact.

Annexes

Annex 1: Survey Tools

Survey 1: Nominations
Thank you for submitting an application for the WISE Grant in in September 2025 and for your participation in this short survey as part of this project to evaluate this evolving collaborative approach to funding. The survey is being conducted by Day Four Projects, who have been appointed as the Evaluation Partner for the WISE Grant.

Your feedback is important for helping to improve the application process, and we expect the survey to take approximately 10 minutes. Results from this survey will be summarised into a short report, and shared with funding partners, yourself and other applicants, and those with interests in collaborative funding approaches. All data will be de-identified, and you will not be identifiable in any report arising from this project. All full survey completions will receive [incentive] in recognition of your time and generosity.

If you have any questions about the survey, please contact info@dayfourprojects.com.

About the WISE Grant 2025
The WISE grant is a collaboration between eight partner organisations who recognise the economic and social value of WISE and have pooled funding to help create a more accessible and streamlined approach to supporting WISE seeking to build their financial resilience and impact. The partners behind the grant program are also seeking to build an evidence base of how best to support WISE using collaborative funding approaches as well as strengthen networks for collective impact in the WISE sector.

Section A: About you and your organisation

1. Your Name

   [Free text]

2. Your Organisation's Name

   [Free text]

3. Your email address

   [Free text]

Section B: About the application process of the grant

[Free text]

4. On a scale of 0-10, how would you rate the *quality of communications* from the WISE Grant Program as part of the application process (e.g. information about the grant, supporting documentation, the LMCF/Greater Melbourne Foundation team)?

   [Likert scale]

   Optional [Free text]

5. Please rate how strongly you agree or disagree with the following statement:

"*The information provided from the WISE Grant assisted my application*"

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

6. Please rate how strongly you agree or disagree with the following statement:

   "*The WISE Grant application process was simple and streamlined*"

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

7. On a scale of 0-10, how would you rate the *level of support* received during the application process?

[Likert scale]

Optional [Free text]

8. In what ways do you think that grant rounds involving collaborations among funders could benefit WISEs?

   [Free text]

9. Are there any other comments you would like to make?

[Free text]

Survey 2: Shortlisted Applicants

Thank you for your expression of interest in the WISE Open Grant Round in July, and for your participation in this short survey as part of this project to evaluate this new collaborative approach to funding.

The WISE grant is a collaboration between eight partner organisations who recognise the economic and social value of WISE and have pooled funding to help create a more accessible and streamlined approach to supporting WISE seeking to build their financial resilience and impact. The new grant program aims to simplify philanthropic grant seeking for WISE as well as help them strengthen and increase their employment and employability outcomes, financial sustainability and core capacity to prepare for future growth. The partners behind the grant program are also seeking to build an evidence base of how best to support WISE using collaborative funding approaches as well as strengthen networks for collective impact in the WISE sector.

The survey is expected to take approximately 15 minutes and participants will receive gift voucher. All participant feedback and data will by anonymised.

Section A: About you and your organisation

1. Your Name

   [Free text]

10. Your Organisation's Name

    [Free text]

11. Your email address

    [Free text]

Section B: About the EOI process of the grant

12. How did your organisation find out about the WISE Open Grant Round?

    [Free text]

13. On a scale of 0-10, how would you rate the *quality* of communications from the WISE Grant Program as part of **the EOI process** (e.g. information about the grant, supporting documentation, the webpage)?

    [Likert scale]

    Optional [Free text]

14. Please rate how strongly you agree or disagree with the following statement:

    "*The information provided from the WISE Open Grant Round assisted my EOI*"

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

15. Please rate how strongly you agree or disagree with the following statement:

    "*The WISE Open Grant Round EOI process was simple and streamlined*"

Strongly agree

Agree
Neutral
Disagree
Strongly disagree

16. On a scale of 0-10, how would you rate the *level of support* received during the EOI process?

[Likert scale]

17. Are there any comments you would like to make about how the EOI process could be improved?

[Free text]

Section C: About the process of applying for the grant

18. On a scale of 1-10, how useful was the '[Grant Social Enterprise Stages Matrix]' when self-assessing your organization's eligibility for the grant?

    [Likert scale]

    Optional [Free text]

19. Please rate how strongly you agree or disagree with the following statement:

    "*The WISE Open Grant Round **application form** was simple to fill out.*"

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

Optional [Free text]

20. On a scale of 0-10, how would you rate the *quality of communications* from the WISE Grant Program as part of **the grant application process** (e.g. information about the grant, guidance documents, other supporting documentation, the webpage etc.)?

    [Likert scale]

    Optional [Free text]

21. On a scale of 0-10, how would you rate the *quality of support* received during **the grant application process** (e.g., responsiveness to questions you may have had, assistance in clarifying application requirements, availability of staff etc.)?

    [Likert scale]

Optional [Free text]

22. Please rate how strongly you agree or disagree with the following statement:

    "*The WISE Open Grant Round application process was simple and streamlined*"

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

Optional [Free text]

23. How satisfied were you with the overall grant **application** process?

Very satisfied
More than satisfied
Satisfied
Partly satisfied
Not at all satisfied

Optional [Free text]

24. In what ways do you think that grant rounds involving collaborations among funders could benefit WISEs?

    [Free text]

25. Are there any other comments you would like to make?

    [Free text]

Survey 3: Successful Grant Recipients

Congratulations on your recent award through the WISE Open Grant Round, and thank you for completing this short survey about your experiences of the grant round process.

The survey is being conducted by Day Four Projects, who have been appointed as the Evaluation Partner for the WISE Open Grant Round.

Your feedback is important for helping to improve the EOI and Application process, and we expect the survey to take approximately 15 minutes. Results from this survey will be summarised into a short report, and shared with funding partners, yourself and other applicants, and those with interests in collaborative funding approaches. All data will be de-identified, and you will not be identifiable in any report arising from this project. All full survey completions will receive a gift voucher in recognition of your time and generosity.

If you have any questions about the survey, please contact info@dayfourprojects.com.

About the WISE Open Grant Round
The WISE grant is a collaboration between eight partner organisations who recognise the economic and social value of WISE and have pooled funding to help create a more accessible and streamlined approach to supporting WISE seeking to build their financial resilience and impact. The grant program aims to simplify philanthropic grant seeking for WISE as well as help them strengthen and increase their employment and employability outcomes, financial sustainability and core capacity to prepare for future growth. The partners behind the grant program are also seeking to build an evidence base of how best to support WISE using collaborative funding approaches as well as strengthen networks for collective impact in the WISE sector.

Section A: About you and your organisation

1. Your Name

   [Free text]

26. Your Organisation's Name

   [Free text]

27. Your email address

   [Free text]

Section B: About the EOI process of the grant

28. How did your organisation find out about the WISE Open Grant Round?

   [Free text]

29. On a scale of 0-10, how would you rate the *quality* of *communications* from the WISE Grant Program **as part of the EOI process** (e.g. information about the grant, supporting documentation, the webpage)?

   [Likert scale]

   Optional [Free text]

30. Please rate how strongly you agree or disagree with the following statement:

   "*The information provided from the WISE Open Grant Round assisted my EOI*"

Strongly agree
Agree

Neutral
Disagree
Strongly disagree

31. Please rate how strongly you agree or disagree with the following statement:

    "*The WISE Open Grant Round EOI process was simple and streamlined*"

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

32. On a scale of 0-10, how would you rate the *quality of support* received during the EOI process?

[Likert scale]

33. Are there any comments you would like to make about how the EOI process could be improved?

[Free text]

Section C: About the process of applying for the grant

34. On a scale of 1-10, how useful was the 'Grant Social Enterprise Stages Matrix' when self-assessing your organization's eligibility for the grant?

    [Likert scale]

    Optional [Free text]

35. Please rate how strongly you agree or disagree with the following statement:

    "*The WISE Open Grant Round* ***application form*** *was simple to fill out.*"

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

Optional [Free text]

36. On a scale of 0-10, how would you rate the *quality of communications* from the WISE Grant Program as part of **the application process** (e.g. information about the grant, guidance documents, other supporting documentation, the webpage etc.)?

    [Likert scale]

    Optional [Free text]

37. On a scale of 0-10, how would you rate the *quality of support* received during the **grant application process** (e.g., responsiveness to questions you may have had, assistance in clarifying application requirements, availability of staff etc.)?

    [Likert scale]

    Optional [Free text]

38. Please rate how strongly you agree or disagree with the following statement:

    "*The WISE Open Grant Round application process was simple and streamlined*"

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

Optional [Free text]

39. How satisfied were you with the overall grant **application** process?

Very satisfied
More than satisfied
Satisfied
Partly satisfied
Not at all satisfied

Optional [Free text]

Section D: About the grant establishment

40. On a scale of 0-10, how would you rate the *quality of communications* from the WISE Grant Program during **the grant establishment process** (e.g. initial contact with the Lord Mayors Charitable Foundation, providing relevant details, receiving funds etc.)?

    [Likert scale]

[Free text]

41. How satisfied were you with the overall **grant establishment process**?

Very satisfied
More than satisfied
Satisfied
Partly satisfied
Not at all satisfied

Optional [Free text]

42. Please rate how strongly you agree or disagree with the following statement:

"The WISE Grant Open Grant Round is contributing to my organisation achieving its goals".

Strongly agree
Agree
Neutral
Disagree
Strongly disagree

Optional [Free text]

43. In what ways do you think that grant rounds involving collaborations among funders could benefit WISEs?

[Free text]

44. Are there any other comments you would like to make?

[Free text]

Annex 3: New Partner Organisation Interview Guide

1. What was your **individual and organisational motivation** to being part of this collaborative approach to funding WISEs?

45. How are you involved in the WISE Grant Collaboration? What activities have you taken part in? What roles have you played?

46. What about the collaboration among funders has worked well so far?

47. What challenges have been encountered?

48. What has been done to tackle these challenges?

49. Has being part of the WISE Grant Collaboration met your expectations? If so, how? If not – why is this the case?
50. In what ways has being part of the WISE Open Grant Round benefited your organization?
51. Have there been any **unintended or surprising results** from the collaboration - both positive and negative? (e.g. new projects, new funding, advocacy, activities, relationships, connections)
52. What were some key lessons you learned through this process to inform future collaboration between funders?
2. Is there anything else you'd like to add?

Annex 4: Original Partner Organisation Interview Guide

1. What changes have been made to WISE 2.0 in comparison to WISE 1.0?
    a. Why were these changes made?
    b. What have been the results or effects of these changes?
2. As you reflect on the last year, how have you as Partner Organisations worked together as part of WISE 2.0?
    a. What have you worked on as a group?
    b. How have you worked together?
3. What has **worked well** about your collaboration as Partner Organisations?
4. What **challenges** have been encountered? What has been done to address these challenges?
5. Have there been any **unintended or surprising results** from the collaboration - both positive and negative? (e.g. new projects, new funding, advocacy, activities, relationships, connections)
6. In looking to the future, what might come next for the WISE Grant Collaboration?
7. Is there anything else you'd like to add?

Annex 5: Social Enterprise Advisory Group Interview Guide

1. What was your individual and organizational motivation for participating in the Social Enterprise Advisory Group for WISE 2.0?
2. Can you describe the purpose and role of the group in relation to the WISE 2.0 Grant Program? Did this differ from WISE 1.0? In what ways?
3. What did being part of the SE Advisory Group involve?
4. Do you think the Advisory Group was effective in its role? Why, why not?
5. Were there any benefits to you or the sector in having the group inform the WISE Grant Program?
6. What challenges were encountered, and what was done to address these challenges?
7. How could the SE Advisory Group be more effective?
8. Is there anything else you would like to add about your experiences of being part of the Advisory Group?

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