

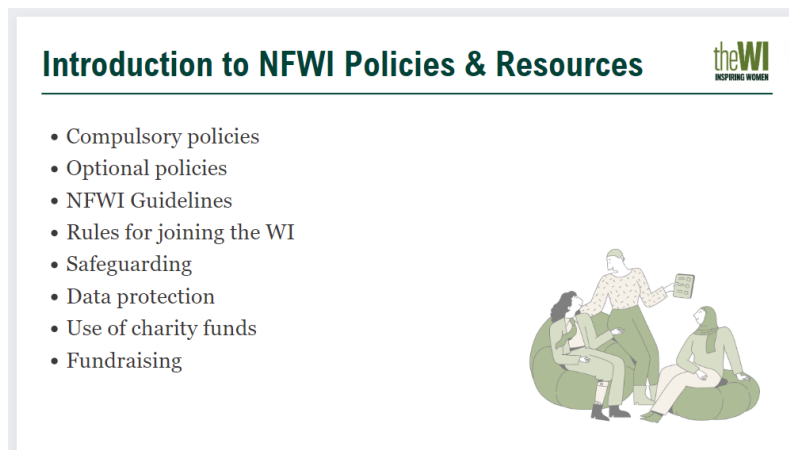
WI Adviser E-Learning Transcript - Module 6

Slide 1 – Welcome



Welcome to the WI Adviser E-Learning, we hope that you find the programme inspiring and that it supports you in your role as WI Adviser. This module has been designed to give you the knowledge of the WIs policies and procedures. A transcript of this module is also available. At the end of this module, you will need to complete a short knowledge test. After you have successfully completed the test at the end of module 7 you will receive a certificate. Thank you so much for volunteering your valuable time as WI Adviser as your support is critical to WIs and federations in creating an enriching experience for our members and for the generations to come.

Slide 2 – Introduction



In this module we will look at the resources that are available and particularly our policies and procedures. Some are compulsory, some optional and others are for guidance, but most importantly WIs need to know about these policies and which they need to put into practice. So, it is worth understanding what policies compulsory, and what guidelines should be adhered to. In this module we focus specifically on those policies that are most relevant to WIs This module will take no more than 30 minutes to complete.

Slide 3 – Policies & Resources

Compulsory Policies

- Access of Carers to members
- Equality Diversity and Inclusion
- Safeguarding
- Health & Safety

Optional Policies

- Data protection
- Ethical policy
- Complaints

NFWI Guidelines

- **The WI Design Principles and Logo Guidelines** covering rules for using the logo and branding colours
- **Trademark Guidelines** includes a list of examples of the ways in which federations or WIs may use the trademarks in furtherance of their charitable objects, e.g. on badges or items of clothing used by, or created for, your WI or federation (but NOT which are offered for sale to the public)
- **Fundraising Guidelines** this is a A WI Guide to Raising Funds for Projects, Causes or Appeals
- **NFWI Social Media Code of Conduct** looks at respectful behaviour and advertising as well as disclaimer statement

All NFWI policies and publications are available to download on My WI

A policy explains what an organisation does and how it does it. A procedure is how the policy is put into practice. As part of a federated structure, WIs operate in a policy framework set by NFWI and federations.

The NFWI's policies set out our organisational position on certain matters, what we stand for, and explain what is expected of our WIs and members. Some of these are compulsory and must be applied in our federations and WIs, and some provide best practice for federations and WIs to draw on.

Where these are compulsory (to be applied consistently across the federated network and in WIs) you can access the latest documents via My WI or directly from NFWI. Where policies are optional or to be tailored to each federation and WI, you should contact your federation to access the materials.

All NFWI policies and publications are available to download on My WI. The following NFWI policies apply to all federations and WIs because they set out our organisational and legal position. We will provide a summary here but will go on to explore some of these policies in more detail later in this module.

As a WI Adviser you are not responsible for delivering these policies in your WIs, but it is important you are aware of them and can explain them as well as signposting your WIs to the right place for any specific enquiries.

Slide 4 – Compulsory policies

Which are compulsory policies?

- Access of carers to members
- Equality, Diversity & Inclusion
- Safeguarding
- Health & safety



All NFWI policies and publications are available to download on My WI



Compulsory policies...

Access of Carers to members

This policy applies to all three levels of the organisation because it is our organisational and legal position on the access of carers to meetings and events to ensure the WI is accessible to all.

More information can be found in The WI Handbook.

Equality, Diversity, and Inclusion

The Equality, Diversity and Inclusion Policy applies to all three levels of the organisation because it is our organisational and legal position on equality, diversity, and inclusion.

This is an important area to explore with new WIs to ensure they have an opportunity to ask any questions and you are encouraged to contact NFWI if you would like any support on specific areas of this policy or any questions you have been asked.

This policy contains a signing page that all WIs and federations must sign and keep for their own records.

Safeguarding

Safeguarding adults at risk means protecting their right to live in safety and free from abuse and neglect. This compulsory policy ensures the safety of members is at the heart of all WI activities and that members know where to raise any concerns or queries within their federation. WIs are responsible for the safety and safeguarding of their members, but they are supported to do this by their federation and NFWI.

Each federation has a Safeguarding Officer who manages safeguarding compliance, queries, and reports within the federation, working with the NFWI Safeguarding Officer (NSO) and the NFWI Chief Executive (CEO) and assisting WIs where necessary.

Federations are required to appoint a FSO from within their existing federation board and ensure that there is a named person holding this role at all times and that the contact details for the FSO are clearly signposted to all members within their federation. All

Federation Trustees will hold equal responsibility for the implementation of the NFWI Safeguarding Policy and ongoing management of safeguarding. The FSO will be the lead and first point of contact, as well as being the liaison person between the federation, the WIs within the federation and the NFWI.

You will need to know who your federation FSO is and share these details with your WIs.

Health and Safety

Implementation of the Health and Safety Policy is compulsory for WIs, and individual risk assessments are a requirement for all WI activities to ensure the committee have considered and addressed any risks. WIs will be covered by insurance, held by the federation and so they must also be aware of any requirements as part of this policy, including notifying the federation or insurer when they are undertaking any non-standard activities that may require additional cover.

Please refer to your federation or any local information on the relevant insurance cover.

Due to the nature of the role, a Trustee is considered a duty holder under the Health and Safety at Work Act 1974 (HSWA). The Charity Commission requires charitable organisations to report 'serious incidents'. Health and safety incidents are therefore likely to trigger the need to make a serious incident report. Please refer to the NFWI policy for more details on this.

Slide 5 – Optional policies

Which are optional policies?

- Data protection
- Ethical
- Complaints

All NFWI policies and publications are available to download on My WI

Data protection

The UK General Data Protection Regulation (GDPR) recognises certain categories of personal information as sensitive, and therefore requiring more protection. These categories of data include information about your health, ethnicity, and political opinions.

It is common for WIs to want to communicate with members and share contact details, so committee members should be aware of the policy and ensure they are managing data effectively and in line with members legal rights.

The NFWI's GDPR Policy says 'In certain situations, the NFWI may collect and/or use special categories of data (for example in order to make adjustments for any disabilities or dietary requirements you may have when attending our events or to provide an audio version of our magazine WI Life). The NFWI will only process these special categories of data if there is a valid reason for doing so and where the GDPR allows us to do so. For instance, we will usually seek your explicit consent to use such data'.

Ethical

The Ethical Policy sets out the ethical standards which the NFWI adheres to when carrying out its charitable objects. The national policy uses this framework to guide all its activities.

This policy applies to all NFWI staff and trustees when carrying out their duties for members and underpins the procurement process and/or formal discussions with external partners and suppliers. The policy gives statements about:

- Public Benefit
- Integrity
- Openness and Transparency
- Right to be Safe
- Anti-Slavery
- Fundraising
- Investments
- Environment
- Purchasing

Whilst WIs do not need their own ethical policy, it is important for ethical considerations to be taken into account when considering making purchasing decisions, partnerships etc. in order to protect the WIs reputation and ensure decisions are being made in line with the charity's campaigning positions and charitable objects.

Complaints


The NFWI and your federation have complaints policies. These policies should be publicly available and will guide the process for the management of any concerns that are raised formally. Although it is hoped new WIs and their members will never need this, they should be aware of how to formalise any concerns that come up and what support is available to them to ensure these are addressed.

WIs may find the following NFWI guidance documents helpful:


- NFWI Complaints Handling guide
- Fundraising guidelines. WIs will generally want to focus their energies on raising money for other charities that are important to their members. This policy provides practical guidance for this charity-to-charity fundraising which helps them operate within the guidelines laid down by their charity regulator.
- Health and Safety Policy
- Lottery Guidelines
- Serious Incident Reporting

Slide 6 – NFWI Guidelines

What are the NFWI Guidelines?



- WI Design Principles and Logo
- Trademark
- Fundraising
- Social Media Code of Conduct



All NFWI policies and publications are available to download on My WI

Now we look at the following NFWI guidelines which must be adhered to by all federations and WIs:

- The WI Design Principles and Logo Guidelines covering rules for using the logo and branding colours.
- Trademark Guidelines includes a list of examples of the ways in which federations or WIs may use the trademarks in furtherance of their charitable objects, e.g. on badges or items of clothing used by or created for your WI or federation (but NOT which are offered for sale to the public).
- Fundraising Guidelines - a WI Guide to Raising Funds for Projects, Causes or Appeals.
- NFWI Social Media Code of Conduct looks at respectful behaviour and advertising as well as disclaimer statement.


All the guidelines are available on My WI and as a WI Adviser you should be familiar with them as you will need to cover all the policies when you open a new WI and be on hand for any enquiries when a new WI is up and running and sometimes for established WIs.

However, please note that importantly, it is never you as a WI Adviser who is expected to address or pick up the enquiries. In all cases there is always someone to signpost to, for example your federation office, Federation Safeguarding Officer/National Safeguarding Officer or the NFWI staff team.

Slide 7 – Joining rules

What WIs need to know about our joining rules

- The WI is open to all women
- How to promote ED&I?
- What and how to report concerns about ED&I?
- Email:
membership@nfwl.org.uk for discrimination concerns



We would now like to explore some of these policies and concepts in more detail...

The WI is open to all women. We welcome and celebrate a diverse cross-section of women, offering a space where they can be themselves surrounded by other supportive women. This is the essence of the WI, something we are all proud of and something we all contribute to.

We do not ask members any personal questions as part of the joining process and are committed to ensuring all members are treated fairly and equally whatever their background or individual circumstances. We strive to provide equal access to all opportunities on a national and local level.

Promoting equality, diversity and inclusion within the WI can be achieved by:

- Ensuring all women are welcome, included, accommodated for, and celebrated.
- Including equality, diversity and inclusion on committee and board agendas.
- Where possible ensuring meeting and event venues are accessible for all members.
- Where possible ensuring activities, events and outings are suitable and open to all members.
- Fostering a culture where members can ask for changes and see those changes being made where possible.
- Thinking about how your WI uses inclusive language that reflects the ideals of the organisation.

We take breaches of the NFWI Equality, Diversity, and Inclusion Policy very seriously and will begin investigations into potential breaches when necessary. If we are made aware of issues, we may choose to follow these up as a formal complaint even where this has not been specifically requested and the complainant will be contacted about this. However, we know that by working in partnership with our federations and WIs we can ensure we deliver on our commitment to provide equal and fair access to our WIs and to ensure that everyone has a positive experience.

If you or your WIs have any concerns about equality, diversity, and inclusion, or you wish to report potential discrimination, please advise WIs to get in touch with their respective WI

committee, federation or the NFWI Membership and Engagement Team using the contact information in the WI Handbook. You can also view the NFWI Complaints Policy on My WI which WIs and federations are welcome to adopt.

Our organisational and legal position is set out in the NFWI Equality, Diversity and Inclusion Policy which can be found on My WI. This policy applies to all WIs and federations.

Further training on ED&I can be found on the WI Learning Hub.

Slide 8 – Protected characteristics

A slide titled "What are the protected characteristics?" with the "theWI" logo in the top right corner. The logo consists of the text "theWI" in a green, lowercase font, with "INSPIRING WOMEN" in a smaller, black, uppercase font below it. The slide content is a bulleted list of protected characteristics.

What are the protected characteristics?

- Age
- Disability (including mental health and hidden disabilities)
- Gender re-assignment
- Marriage and civil partnership
- Pregnancy and maternity
- Race
- Religion and belief (including those with no religion or belief)
- Sex
- Sexual orientation

Members must not be treated less favourably, or be denied access to any opportunities, on the grounds of the protected characteristics. Any such treatment may be discrimination under the Equality Act 2010. In this module we would like to explore in more detail what these protected characteristics mean in a WI context to help support you and your WIs. This is by no means an exhaustive list but hopefully covers some of the key areas you may wish to explore with your WIs.

Age

The WI has a broad age range of members, and this provides the opportunity to form intergenerational relationships. These friendships enrich the experience of being a WI member and enable women to meet and learn from women they may not usually meet in their day-to-day lives.

Members with disabilities

The WI aims to ensure members with disabilities can, as far as possible, receive the same services as those who do not have disabilities. Reasonable adjustments may need to be made to minimise or remove the disadvantages experienced by those with disabilities.

An example of a reasonable adjustment is taking steps to ensure that members with dementia are able to arrive at and leave the meeting or event venue safely.

What is reasonable depends on the circumstances of each individual including:

- The type of disability.
- How practicable the adjustments are.
- How the adjustments would overcome the disadvantages experienced.
- The size of the organisation, the resources available and the cost of the adjustments.

The WI may have to change the way things are done, change a physical feature of its property and/or provide extra aids or services where it is reasonable to do so. WIs who do not own their meeting venue will need to talk to the venue management/owner about this. It is recommended that the WI committee speak to those members who require improved accessibility to fully understand and meet their needs.

As stated in the WI Handbook and covered previously in this training, making meetings accessible includes allowing members' carers to attend meetings. Please see the policy on My WI on the access of carers to WI meetings and events for more information on this.

Transgender members

The WI is trans-inclusive. This means that transgender women are welcome to join the WI and to participate in any WI activities in the same way as any other woman. The WI provides women with educational opportunities and the platform to campaign on issues that matter to them and their communities whilst always celebrating what it means to be a woman.

Whilst this is the organisation's admission policy, the WI is a safe space which respects all views and therefore WIs should ensure that their WI protects the rights of transgender members and also those who hold gender-critical beliefs. It is important that all WIs provide a safe space for all members.

Welcoming transgender women to the WI builds on our ambitions and enriches our membership to ensure we are a place for all women to celebrate who they are and influence positive change in their communities.

Non-binary members

Non-binary is an umbrella term for people whose gender identity doesn't sit comfortably within the binary categories of 'female' or 'male', and non-binary people often use gender neutral pronouns such as they/theirs. A person who was assigned female at birth but who identifies as non-binary is able to join the WI. This is because they fall within our women only exemption as they were assigned female at birth.

Pregnancy and maternity

Our members will include women who are pregnant, breastfeeding, or who have recently given birth, and it is important these women are supported. For example, this may mean ensuring women feel able to bring their baby to WI meetings and providing a quiet space where members can breastfeed or express milk where possible. Talking to members about this is the best way to ensure their needs are met.

Race

Race includes a person's skin colour, their nationality, ethnic origin, and national origin. We recognise that unfortunately racism exists in our society, and we are committed to ensuring members understand what racism is and, if encountered, how to report it.

Racism can take many forms such as racist behaviour/language or the creation of rules that result in harmful treatment of people based on their race. Race discrimination does not need to be deliberate; it is possible for someone to discriminate against someone else without realising it or meaning to do so.

There is no place for racism or prejudice within the WI, and we work continuously to ensure that the WI is a place for women of all races and where members are empowered to challenge racism in their communities.

Religion and religious belief


The WI is non-sectarian meaning that we are not connected or affiliated with any particular religion or religious belief. We therefore welcome both women who belong to an organised religion or have religious beliefs, and women who do not.

Sexual orientation

The WI welcomes all members, regardless of their sexual orientation and no WI member should be treated differently because of their sexual orientation.

Slide 9 – Data Protection

Data Protection



What do WIs need to know about data protection?

Data Protection legislation applies to charities including WIs, so WIs must understand:

- What personal information they hold
- How they got it
- Who can access it
- Why they need it, and how they will eventually dispose of it
- How long it will be retained for

It's important WIs know what a Subject Access Request (SAR) is, and how to spot one

It's important WIs know what a data breach is, how to spot one and how to manage one should it happen.

WIs can reach out to NFWI - dataprotection@nfwi.org.uk

The Data Protection section of My WI contains all the essential information WIs need to ensure they understand their responsibilities. As communication is such a big part of the management of a WI it is important that WIs are aware of the policy and feel confident about what it means for them.

Data Protection legislation applies to all charities, including WIs so it's important WIs understand what personal information is and how it's used.

Topics covered on My WI include:


- What is personal information?
- What should a WI do to ensure they've taken the steps required to comply?
- What is a Subject Access Request, and how do I spot one?
- What happens if something goes wrong? What are a WIs responsibilities if there's a data breach?

WIs can also find helpful templates such as a suggested Photography Consent form, a suggested Data Mapping template and other useful guidance on My WI. We also share links to the relevant sections on the Information Commissioner's Office (ICO) website as well as contact details for help and guidance from the NFWI. WIs should note that their federation might produce additional resources which might also be available alongside the advice and guidance shared by the NFWI.

Slide 10 – Charity Funds

Charity Funds

What do WIs need to know about the use of charity funds?



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Financial management is an area where regulators have clear expectations and standards that charities are required to follow. This ensures charities are well managed, charity money is used appropriately and that the public can be confident that money they donate is used in the best interests of the charity. WI funds must be used in accordance with the Constitution as agreed by the WI committee following a consultation with the members.

Any funds received by the WI are considered charity funds, including the income from membership subscriptions, and therefore this belongs to the charity as opposed to its members. Any use of those funds must be in line with the charity's objects and in the best interests of members. WIs are encouraged to regularly discuss and vote on how the WI's funds will be used, to support the Committee. Charity funds must be spent in line with the constitution and charitable objects.


WIs will produce accounts to provide a summary of how they have managed their funds each year and these will be reviewed by an Independent Financial Examiner (IFE) who will look particularly at how the charity's funds have been used and how this has been recorded.

Slide 11 – Fundraising

Fundraising

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What do WIs need to know about fundraising?



WIs can raise funds not only for their own programmes, but also to support other local charities that are in line with the WIs' charitable objects as set out in the Constitution. This is a regulator requirement, with charities only able to financially support other charities who have compatible charitable objects.

The assessment of another charity to ascertain whether a WI can raise funds for is a simple procedure and guidance is laid out in the NFWI Fundraising Guidance. This is an essential piece of information for new WIs, and it is worth familiarising yourself with this guidance so you can offer support. This is particularly important as the policy recently changed (in 2023) and so some longer-serving WI members may be unaware of the new guidance.


There may be causes that WI members want to support that fall outside the scope of the objects. WI members can fundraise for these causes as long as they do this as individuals and not in the name of the WI. Please see the NFWI Fundraising Guidelines on My WI for further information on fundraising.

Slide 12 – Summary of Learning

Summary of Learning

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- Compulsory policies
- Optional policies
- NFWI Guidelines
- Rules for joining the WI
- Safeguarding
- Data protection
- Use of charity funds
- Fundraising




In this module we have gone through the policies and procedures that it is important that WIs have a knowledge of and adhere to. As a WI Adviser you will go through the policies and procedures with the WI and answer any queries they may have or signpost them to the relevant person who can help and support them.

Slide 13 – What does it mean for me as a WI Adviser?

What does it mean for me as a WI Adviser?



- Signpost
- Support
- Protect
- Best practice





As a WI Adviser, it is important that you are familiar with the WIs policies and guidelines to help WIs set up and run effectively and that all members have access to the WI and are supported and protected. It will ensure that good habits and practices are adopted from the beginning. All the policies and guidelines can be found on My WI which is a great source of reference for a WI Adviser and the WIs.

To re-emphasise, it is never you as a WI Adviser who is expected to address or pick up the enquiries. In all cases there is always someone to signpost to, for example your federation office, Federation Safeguarding Officer/National Safeguarding Officer or the NFWI staff team, therefore please do not hesitate to contact any of the above should you require support.

Slide 14 – Knowledge Test

Knowledge Test



Well done, you have reached the end of this module. We have prepared five questions as part of the knowledge test which we hope you have answered accurately. If not, then please do return to the slides and become familiar with the topics.