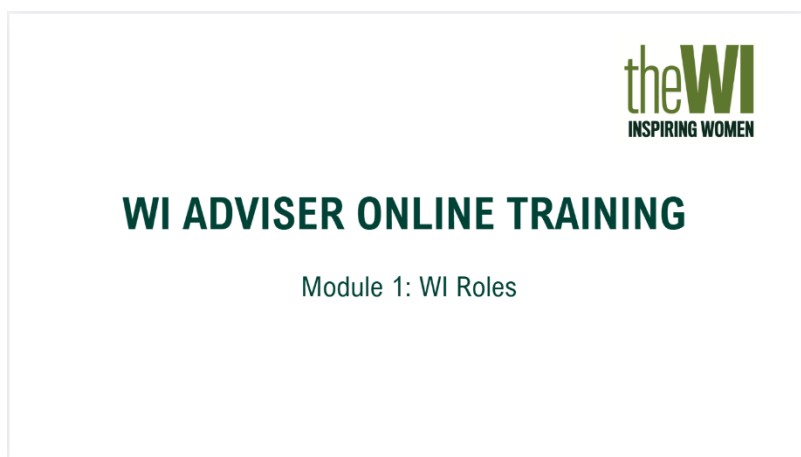


WI Adviser Online Training Transcript - Module 1

Slide 1 – Welcome



Welcome to the WI Adviser Online Training, we hope that you find the programme inspiring and that it supports you in your role as a WI Adviser.

This training complements the WI Core Module Programme and is designed to enhance your understanding of the responsibilities that come with your role. The Core Module Programme consists of three modules that cover key areas, including; an introduction to the WI, an overview of the Constitution, and an in-depth look at the Policies and Procedures established by the NFWI.

For a seamless experience, we recommend completing the WI Core Modules before beginning the WI Adviser training, as they provide helpful context and serve as a useful refresher. You'll find the link to these modules just below the video.

In this module we will look at the role of the WI Adviser in detail. We will also look at the other roles within the organisation that are there to support you and your WIs, either within your federation or at the NFWI.

All resources referenced in the modules, as well as a transcript, are available under the 'Helpful Links' section below the video.


At the end of the module, you'll complete a short knowledge test. Upon successful completion of all four modules, you'll receive a certificate recognising your achievement.


Thank you so much for volunteering your valuable time as a 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

WI Roles

- Introduction to the role of the WI Adviser
- WI roles
- Supporting roles





This module will act as an introduction to the role of the WI Adviser.

We'll explore


- The different roles that exist within a WI, including the committee roles
- And other roles within WI's and federations that can be of further support if required.

We hope that by the end of the session you will have a good understanding of the different roles within the WI.

Slide 3 – What is the role of a WI Adviser?

What is the role of the WI Adviser?

- Appointed by your federation
- Responsible for opening, suspending, enlarging, re-forming and closing WIs
- Signposting to a portfolio of federation and NFWI resources
- Supporting new and existing WIs



A WI Adviser is a constitutional member support role, trained and appointed by the federation to work under the direction of the Federation Board of Trustees. The WI Adviser


appointment is reviewed and reappointed annually. The federations will continue to appoint, manage and renew their WI Advisers, and provide members with an interest in becoming a WI Adviser the opportunity to shadow experienced WI Advisers. A WI Adviser can be appointed before they complete their training.

Having been appointed by your federation to support WIs you will be responsible for opening, suspending, enlarging, re-forming, and closing WIs and also undertaking a small number of key elements that support these constitutional tasks, such as supporting initial 'interest meetings', sourcing venues, signposting to a portfolio of federation and NFWI resources and advising on a range of topics. Your role as a WI Adviser is valuable and crucial to the organisation, you play an important part in ensuring that our WIs are supported and well governed. As covered in the Core Modules, the constitution is the foundation of how our charity operates and your role is key to ensuring WIs are aware of the constitution and feel confident and empowered to manage their WIs in line with their constitutional requirements.

You will also be able to help advise on the implementation of NFWI and federations policies, programme planning, and committee and annual meetings to ensure the smooth running of the WI, as well as direct the WIs to further support from the federation, specialist volunteers within the federation and the NFWI for further guidance on specific areas such as finance, resolutions, safeguarding, conflict management and much more. What each of your WIs wants and needs from you is likely to be different and to change over time. The important message is that you will not be expected to know everything or do everything, and you will not be alone in the role as there a lot of resources both human and virtual to support you.

Slide 4 – WI committee roles

What are the WI committee roles?



Officers include the President, Treasurer and Secretary

- **President** - co-ordinates the affairs of the WI
- **Treasurer** - responsible for the financial wellbeing of the WI
- **Secretary** - ensures the committee business is carried out

Additional Committee Roles - Vice President, Assistant Secretary and Assistant Treasurer

There are many roles that play a part in the success of a WI, and further information about these roles can be found in the WI Handbook. But each WI must have a President, a Treasurer and a Secretary, they may also agree to have other roles such as a Vice-

President or an Assistant Secretary or Assistant Treasurer, and collectively these are known as 'the Officers'.

New Officers should be signposted to the WI Officer Inductions on the WI Learning Hub, and you may like to familiarise yourself with the content of these inductions also; a link to these is available just below the video - <https://learninghub.thewi.org.uk/on-demand/courses/wi-training-on-demand-wi-officer-induction/>

Let's look at the different roles and what they are responsible for.

Slide 5 – WI President

What is the role of the WI President?



President
Co-ordinates the affairs of the WI



The President

The President is elected at the Annual Meeting, by a ballot of the members, from the elected committee members. The specific duties of the President are to:

- Chair WI meetings, the Annual Meeting and committee meetings.
- Co-ordinate the affairs of the WI.
- Oversee the work of the committee and sub-committees.
- Ensure the resolutions process takes place and oversee this.
- Oversee the bank reconciliations with the committee as a whole.


For more details on the role of the President, please consult the WI Handbook.

Slide 6 – WI Treasurer

What is the role of the WI Treasurer?



Treasurer
Responsible for the financial wellbeing of the WI



The Treasurer

The WI committee as a whole is responsible for the financial well-being of the WI but the Treasurer has responsibility for the following:

- Open a bank account in the name of the WI (if they are the first Treasurer of a new WI) and ensure the committee appoints no less than three signatories (usually the President, Treasurer, and one other committee member) to authorise payments on behalf of the WI. All payments must be authorised by two signatories.
- Draw up the budget for the financial year based on the previous year's figures. This will be presented first to the committee and then to the members for approval. The budget must be regularly monitored and may be revised if necessary.
- Ensure that charity monies are being used appropriately.
- Collect the annual subscriptions and pay these, and all other monies, into the WI bank account.
- Ensure the following obligatory payments are paid on time e.g. the annual subscription fees to the federation (including the NFWI portion) and, in relevant years, the Pooling of fares for the NFWI Annual Meeting (the contribution each WI makes to a federation's costs which will enable its WIs to send delegates).
- Pay all invoices and issue receipts.
- Keep the WI accounts up to date (please note NFWI provides an account book to make this task as simple as possible).
- Engage with the Independent Examiner to review the accounts.
- Present the independently examined accounts to the committee and then to the members at the Annual Meeting, accompanied by bank statements.

For more details on the role of the Treasurer please see consult the WI Handbook.

Slide 7 – WI Secretary

What is the role of the WI Secretary?

Secretary
Ensures the committee business is carried out




INSPIRING WOMEN

The Secretary

The Secretary is elected annually, by the committee, at its first meeting after the Annual Meeting. The specific duties of the Secretary are to:

- Arrange and communicate the details of meetings and ensure committee business is carried out.
- Handle and acknowledge correspondence, referring to other officers as appropriate. This includes communicating and actioning any federation or NFWI information received.
- Ensure the WI complies with data protection requirements. For example, only collecting the necessary information from members to enable the WI to provide membership services.
- Organise and coordinate the work of any sub-committees and working groups.
- Assist the President and Vice-President(s), if applicable, with their duties.
- Keep in regular contact with the federation.
- Answer queries from members, asking for assistance from the federation or the NFWI where necessary.
- Maintain an attendance register.
- Ensure speakers and visitors know where the meeting venue is and have appropriate access.

It is important that the Secretary's information is kept accurately on the Membership Communication System (MCS) to ensure they receive the NFWI mailings. For more information about the MCS and the NFWI mailings please see the WI Handbook.

For a more detailed list on the role of the Secretary, please see the WI Handbook.

Slide 8 – Additional committee roles

What are the additional committee roles?

Additional Committee Roles - Vice President, Assistant Secretary and Assistant Treasurer

The running of a WI should be seen as a team activity





WIs if they so wish can agree to additional roles within their WI, these can include, but are not limited to, the following:

Vice President - The Vice-President(s) is elected at the first meeting after the Annual Meeting. WIs can have up to three Vice-Presidents. The President can delegate duties to the Vice-President(s), such as chairing the WI meeting.


Assistant Secretary - The Assistant Secretary should have specific tasks delegated to them such as taking the minutes or completing the attendance register.

Assistant Treasurer - The Assistant Treasurer should have specific tasks delegated to them, such as collecting the annual subscription fees.

We would always encourage WI members to see the running of the WI as a team activity, not something left to a few individuals. Therefore, outside of the formal roles that are appointed to, we would encourage you to work with a new WI to develop an approach that ensures, where appropriate, tasks are shared amongst members or an extended Officer team.

Slide 9 – Other WI roles

What are the other WI roles?



- MCS Representative
- Social Media Officer
- Programme planning team
- Book-Keeper
- Climate Ambassador
- WI welcoming team

Within the WI there are many additional roles which provide opportunities for members to engage in the running of the WI without the commitment of being on the committee. Again, this ensures the work the WI is spread out. These include (but are not limited to):

Membership Communication System (MCS) Representative

An MCS Representative enters members' information onto the MCS and ensures all details are regularly checked and updated. This is a vital role which supports the WI but also ensures that members can access their member benefits. For more information about the MCS please see the WI Handbook.

Social Media Officer

A member who is responsible for running the WI's social media channels, and updating them with the latest news, photos, and upcoming events. This role can be shared by multiple members.

Programme planning team

The programme planning team can put together the speakers and activities for the year. This team can include committee and non-committee members and is a great way to ensure the programme is being developed in line with the interests of members.

Bookkeeper

The Bookkeeper may keep the records of the financial affairs of the WI where this cannot be carried out by the Treasurer. The financial responsibility for the WI remains with the WI Committee and the Treasurer remains the 'named person' responsible for the accounts, but additional assistance can be sought if required.

Climate Ambassadors

Climate Ambassadors are managed and supported by NFWI but operate across federations. They do great work to promote the NFWI's Climate Change campaign and can support your WIs to engage with this work. Over the years, they have formed influential relationships with MPs and their wider communities, and helped engage a wider audience in the WI's campaigning work. The NFWI provides the latest information to support the work of this role. If you would like to find out more about Climate Ambassadors, please see My WI or contact the Public Affairs Team.

WI Welcoming Teams

Continually welcoming new members is essential to the future growth and well-being of the WI. It is therefore very important that visitors and new members are welcomed and looked after by the WI as a whole and that they immediately feel part of what we do. By appointing a separate Welcoming Team a committee can be sure that new members are looked after and this also provides an opportunity for other members to play an active role in growing and developing the WI.

It is recommended that you undertake further reading from the WI Handbook and contact the Membership Team should you have any questions.

Slide 10 – Additional support

What other support is available?



- Federation Safeguarding Officer
- Federation Resolution Co-ordinator
- Digital Champions
- Conflict management
- Social media
- Independent Examiners
- Training
- NFWI staff team

In addition to the roles that support the running of the WI, there are also members with additional skills within your federation and the staff team at the NFWI who can support you as a WI Adviser and your WIs. Within the federation you have a Board of Trustees who have a range of skills you can call upon.

Federations have a role in establishing effective links between WIs and federations, and supporting the development of the WIs in their area. It is useful for a federation board member to attend a newly formed WI meeting in the early stages to explain the role of the federation and the opportunities it offers members. It also gives members an insight into the wider organisation that they are part of. In addition, the NFWI offers a range of roles (and training courses) for members which gives them the necessary skills to support and advise WIs.

These roles are known as specialist volunteers and each federation will have their own teams. These roles are a resource of skilled members that you can call upon to address specific issues. Depending on who has been appointed in your federation, these volunteers can provide support on a range of areas such as WI finances, Public Affairs resolutions, WI Officer training, managing complaints, conflict management, promotion, and marketing to name but a few.

Below is a list of some of the roles which may be in your federation, but please be aware that these will vary by federation and that new roles will be added over time, so do always check what is available with your federation team.

Federation Safeguarding Officer (FSO)

Each federation is required to appoint an FSO. The FSO 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 must ensure 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.

It is recommended that you undertake further reading from the WI Handbook and contact the Membership Team should you have any questions.

Federation Resolution Co-ordinators

A Federation Resolution Co-ordinator provides advice, on behalf of their federation, to members submitting campaigning resolutions. Training is available from the NFWI for any member interested in becoming a Federation Resolution Co-ordinator. The annual resolution process is a key part of the life of the WI and so this role is a useful one to signpost your WIs to for more information about the process and how members can get involved.

Digital Champions

Many federations will have individuals or teams who can assist with all issues to do with technology and its use. If you have WIs who are concerned about the digital side of managing their WI it is useful to check with your federation what support is available.

Social Media Team

Members who can help you set up social media pages such as Facebook and Instagram to allow WIs to promote themselves.

Independent Examiners

Independent Examiners are available to support WIs on all the financial elements that the WIs are required to comply with and will be a point of contact for any financial queries for all established WIs. Independent Examiners will also examine a WI's accounts each year and so it is useful to ensure your WIs know about this role.

Training

Training is available from the NFWI on the WI Learning Hub on a range of subject areas such as Digital Engagement, Conflict Management, PR, and Marketing. Please check the Learning Hub to see what is available and also ask your federation what is available to support you in your role as a WI Adviser. However once again, you are not expected to be an expert in all these areas or to support your WIs on these. Your role is to have an awareness of the wider team and the support resources available so you can signpost your WIs to the support and information they need.

NFWI Support


The NFWI employs staff to support the membership and you as a WI Adviser. Any general queries or concerns can be passed to the NFWI Membership Team on membership@nfwl.org.uk. Alternatively, if you have a specific query for one of the teams a complete list of the NFWI Teams, what they do, and their contact details can be found in the WI Handbook and also in the WI Formation Pack sent to newly formed WIs. The staff are there to support you in your role and to make it as easy as possible for your WIs to run their charities, therefore, please do not hesitate to contact the NFWI when needed.


Slide 11 – Summary of Learning

Summary of Learning

- Introduction to the role of the WI Adviser
- WI roles
- Supporting roles

We hope you have learned something new or refreshed your knowledge!





In this module we have:


- Gone through the role of the WI Adviser and covered your role in opening, suspending, re-forming, and enlarging WIs.
- Covered the roles within WIs and their responsibilities, as well as the roles at federation level
- Signposted to the teams within the NFWI to ensure that you feel supported in your role. This range of roles are all available for you to access for further advice and guidance when needed.


Slide 12 – What does it mean for me as a WI Adviser?

What does it mean for me as a WI Adviser?

Key highlights

- The WI Handbook
- My WI
- The WI Learning Hub

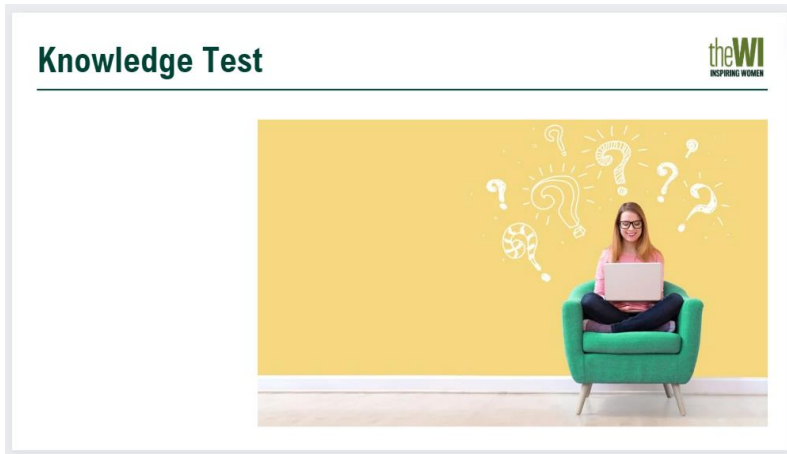




As a WI Adviser, it is important that you are familiar with the WI Handbook which will give you further information on the roles within the WI, federation and the NFWI and what they all do to ensure the smooth running of the WIs. A copy of the WI Handbook can be found on My WI and is a great source of reference for a WI Adviser and a useful guide for WIs. It will ensure that good habits and practices are adopted from the beginning and your role plays a very important part in ensuring this. Just a reminder however that you are not

expected to know everything or to do everything. You have a wide range of roles and resources that are available to you to support you in your role.

Slide 13 – Knowledge Test



Well done, you have reached the end of this module. Now, it's time for the knowledge test. There are five questions based on the material covered. If needed, feel free to review the slides to refresh your understanding.

We appreciate your time and commitment in this role.