

WI E-Learning Transcript – Core Module C

Slide 1 – Welcome



Welcome to WI E-Learning! We're excited to guide you through this series of core modules, designed to give you an in-depth understanding of the WI as an organisation. In this final core module, you'll learn about the WI's policies and procedures.

A transcript is available for easy reference. To earn a certificate, simply complete a short knowledge test at the end of each module. Thank you for joining this journey to become more informed about the WI—let's get started!

Slide 2 – Introduction

Introduction to NFWI Policies & Resources

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





In this module we will look at the resources that are available and particularly our policies and procedures. Some are compulsory, (and are what all members are bound as part of the organisational rules) some optional and others are for guidance, but most importantly federations and WIs need to know about these policies, and which need to be put into practice. So, it is worth understanding which policies are compulsory, and which guidelines should be adhered to.

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's rules and beliefs are. 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. All NFWI policies and guidelines can be found on My WI with additional information indicating how they apply e.g. if the policy is compulsory across all three levels of the organisation.

Where policies are optional or to be tailored to each federation and WI, you should contact your federation to check how it has been applied by them and 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.

All policies (My WI) - <https://mywi.thewi.org.uk/essential-information/wi-policy-and-guidance>

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

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 includes information on the eligibility criteria for membership.

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

Safeguarding

The Safeguarding policy applies to all three levels of the organisation. 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 the 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 an FSO from within their existing federation board and ensure that there is a named person holding this role at all times and that the correct details of 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.

WI Advisers will need to know who their federation FSO is and share these details with their 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 events and trips 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 regulator 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



The NFWI also produces ‘optional’ policies. Federations must have their own policy in each of the following areas, but NFWI provides a template should federations wish to use it. They can however draft their own to suit the needs of their federation.

Data protection

Federations and WIs must comply with data protection regulation. 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. Federations and WIs should have a data protection policy in place and there is guidance to help with this on My WI:

<https://mywi.thewi.org.uk/running-your-wi/data-protection>

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

Federations and WIs should have a complaints policy in place. There is an NFWI policy which can be adopted in part or in full at any level of the organisation. 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.

Additionally, WIs may find the following NFWI guidance documents helpful:

1. NFWI Complaints Form
2. 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.
3. Lottery Guidelines
4. 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'll 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.
- The Trademark Guidelines include 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 which looks at respectful behaviour and advertising as well as disclaimer statement.

All the guidelines are available on My WI. For queries on specific policies 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 - Federation Procedures

Federation Procedures

- Organising events
- Meeting procedures
- Terms of Reference and Standing Orders
- Elections and voting
- Staffing





Federations will have a set of standard procedures to support the work of the federation. These handbooks/procedures set out a standard way of operating to guide trustees and staff in ensuring the work of the board runs smoothly - this could also be supported by a one year calendar of events.

Other standard handbooks consist of all financial procedures that a board should follow, how to organise an event - celebrity speaker in a hall, organising a coach trip or craft workshop. The handbooks often work in conjunction with a standard set of forms - how to submit expenses, items for the federation magazine etc.

Having a standard framework supports the trustees in ensuring effective management and consistency.

Slide 8 – Joining rules

What WIs need to know about our joining rules

- 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...

WI membership is legally restricted to biological women over the age of majority. Our definition of those who have access to membership is guided by the protected characteristic of Sex, as defined in the Equality Act (2010).

However, our organisational belief is that being a woman is a combination of lived experience and biology, and so the WI aims to welcome all women to its wider activities. The NFWI has long-held the organisational belief that transgender women are women and therefore continues to seek ways to ensure it creates inclusive spaces, specifically through our Sisterhood initiative.

We welcome and celebrate a diverse cross-section of women, offering a space where they can be themselves surrounded by other supportive women.

We are committed to ensuring all women are treated fairly and equally whatever their background or individual circumstances and to continue to meet our public benefit as a charity by working with our wider communities outside of our own membership. 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 WI have any concerns about equality, diversity, and inclusion, or you wish to report potential discrimination, we would 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 also be found on My WI. This policy applies to all WIs and federations.

Further training on ED&I can be found on VIA.

Slide 9 – 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 WI committees 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

The WI is an inclusive, supportive and progressive organisation that offers a range of ways for people to engage with our movement. Legal access to formal WI membership is open to women registered female at birth (biological women). Alongside this, the WI provides opportunities for a wider group, including transgender women, to take part in activities, events and initiatives at local and national levels, based on the organisational belief that transgender women are women.

Transgender women are welcome to participate in WI activities that are open to non-members, as well as through national opportunities such as the WI Supporter scheme. Through these opportunities, the WI aims to provide a welcoming and respectful environment where individuals can connect, learn and contribute. In 2025 NFWI launched the Sisterhood initiative which specifically aims to offer WIs and federations a chance to open transinclusive spaces in line with the organisational belief.

The WI recognises that gender reassignment is a protected characteristic under the Equality Act 2010. All individuals engaging with the WI should be treated with dignity and respect, and any form of discrimination, harassment or exclusion is not acceptable. For full guidance, please refer to the NFWI Equality, Diversity and Inclusion Policy.

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 registered female at birth but who identifies as non-binary is able to join the WI as a member.

The WI recognises that gender identity is an important aspect of a person's identity, and is committed to ensuring that all members are treated with dignity and respect. Members should be mindful of inclusive language and, where appropriate, respect how individuals wish to be addressed. For full guidance, please refer to the NFWI Equality, Diversity and Inclusion Policy.

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 10 – 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@nfwl.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 alongside the advice and guidance shared by the NFWI.

Slide 11 – Charity Funds

Charity Funds

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





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. This is why subscription refunds cannot be given. Women interested in joining should have this explained to them and be encouraged to visit before deciding to take out a subscription. Any use of a WI's 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 12 – Fundraising

Fundraising

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 it 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 WI Advisers familiarising themselves 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 13 – Summary of Learning

Summary of Learning

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




INSPIRING WOMEN

In this module we have gone through the policies and procedures including:

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

It is important that federations and WIs have a knowledge of and adhere to these.

Slide 14 – What does it mean for me?

What does it mean for me?

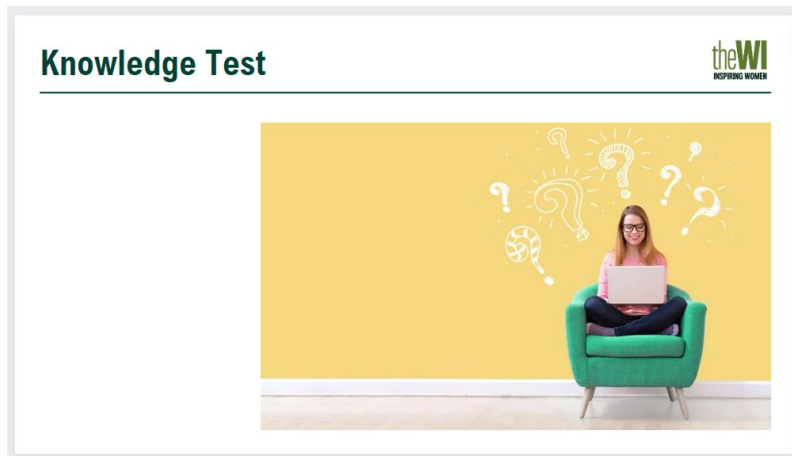
Please read the summary below this video which details how this module relates to your key role.




INSPIRING WOMEN

Each role within the WI has unique responsibilities. Below this video, you'll find summaries for specific roles. Please take a moment to review these to understand how the information in this module applies to you.

Slide 15 – Knowledge Test



Congratulations on reaching the end of the final module of this e-learning package! Complete the five-question test to reinforce your knowledge. If needed, you can revisit any slides to review the topics.

If you are undertaking a key role within your federation or WI, please now refer to and complete the training specific to you.

Thank you for your commitment to learning more about the WI.