



# NEC REPORT

2020-2021

National Executive Committee Report  
of the Nationwide Group Staff Union

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## An introduction from Tim Rose, General Secretary

Through this NEC report, we'll be sharing how we've met the objectives set out in our strategic plan and a summary of our activity since 2019. And what a 2 years it's been. None of us could have envisaged back at our last National Conference in October 2019 what was about to happen not just in the UK, but across the world. Although it has been an incredibly turbulent time, it has also enabled the NGSU team to do what we do best; stand up for our members and be their voice through times of change.

### A change in leadership for NGSU

After 31 years at the helm, Tim Poil retired as General Secretary (GS) in December 2019 and I was honoured to take on the role. Since becoming GS, I've been continually inspired by the resilience of our members, the commitment of the NGSU team, and the dedication of our rep community.

### A period of unimaginable challenges

The impact of Covid-19 has been felt in every area of life. For the first time in our history, we were supporting members through something that affected every single person in both their professional lives and within their families. We have continued to work closely with Nationwide and believe that on the whole, they took all the measures we could have reasonably expected. Our support has been focused across many areas throughout the pandemic, but can be categorised into three main themes:

- **Health & Safety and wellbeing** – keeping people safe while working at home or at Nationwide premises and ensuring strategies are in place to manage their wellbeing.
- **Job protection (placements)** – supporting better redeployment practices for those at risk of redundancy and securing a no

compulsory redundancy agreement for 2020.

- **Effective communication** – keeping in touch with members to understand their experiences of the pandemic and the challenges of remote working really drove home the importance of communication. We issued more news items, had active debates with members on our Forum, held Rep meetings remotely, and conducted a number of member surveys.

Aside from the pandemic, we have also provided support through many other areas and continued our focus on changing the working environment our members encounter including:

- **Future of Work** – dynamic and flexible working.
- **Retail Distribution** – new ways of working through the future of legendary service, and supporting ABM, MC and PBM members through change programmes.
- **Pay Review and Pay Management** – negotiating pay settlements and fairer internally promotion increases.
- **Dispute resolution** – working with Nationwide to encourage a safe to speak environment and informal resolution of disputes.
- **Inclusion and Diversity** – Black Lives Matter - supporting a strong stand against intolerance and creating an inclusive culture where diversity is valued.

### Read more

- [How Nationwide and NGSU responded to the pandemic - page 5 of our Feb 21 Rapport issue](#)
- [NGSU strategic plan outlining our goals for each objective](#)
- [Re-imagining work – an article on the future of work](#)

# Rep Network

**Our strategic plan goal for the Rep network**  
*To develop a network of effective NGSU Representatives who are enabled and empowered to undertake a greater role in the delivery of services to members*

Our strategy places Reps at the heart of all Union activity as they play such an incredibly important part in helping us to fulfil our purpose. For many of our members our Reps are the face of the Union, providing advice and representation both individually and collectively. Our goal to develop a network of Reps that provides the first line provision of services to members is vital to the long-term sustainability of the Union. It enables the delivery of cost-effective services and also supports the succession of Reps into the NEC and Officer roles.

## Rep coverage for April 2021-March 2023

- 199 Rep positions with 171 filled (approx. 86% filled).
- Branch Network including Mortgage Distribution & Financial Planning: 98 Rep positions with 90 filled (approx. 92% filled).
- Admin Centres: 101 Rep positions with 81 filled (approx. 80% filled).

## The Role of Representatives

NGSU Reps focus solely on supporting Union activity within Nationwide. The role of a Rep covers four broad areas:

- 1 Representing members
- 2 Advising members
- 3 Keeping in touch with members
- 4 Recruitment

## Support for the Rep network

There is no doubt that since our last conference it's been the most turbulent and challenging times our Reps have faced. They've consistently stepped up to support members through the wide variety of issues arising from the pandemic. These included the sudden transition to working from home, dealing with physical changes and restrictions in branches while continuing to serve the public and a number of change programmes and redundancies, all while having to navigate these challenges personally. With the absence of face-to-face Regional Council meetings, it was vital that Reps were supported through these challenging times, so we:

- Continued to hold council meetings remotely.
- Improved our regular communications to Reps.
- Collaborated with Nationwide in developing and arranging one hour 'bite-size' sessions on Pay Policy, Sticks and Stones, Whistleblowing and Grievances.

## Read more

- [Strategic Plan Section One](#)
- [Reps Handbook](#)

# Professional Service

## Our strategic plan goal

*Deliver professional support, advice and representation to members*

Since our last conference, although supporting our members through the pandemic has undoubtedly been our main focus, we have also continued to work with Nationwide on other aspects of working life that have been, and always will be, incredibly important. It remains our focus to support our members professionally and to provide guidance and representation where needed through their whole career at Nationwide.

## Supporting members remotely

Although it has been difficult not being able to meet members face to face, and we've had to get used to new technology, our Individual Cases Officers (ICOs) have been brilliant at adapting to support members virtually by attending disciplinary and grievance hearings via Teams. Overall hearing numbers have fallen year on year (shown on the next page) which is a positive trend we hope to see continue.

## New process for dispute resolution

The new process, currently being trialled in the branch network, is designed to allow for a quicker resolution and offer a range of informal options such as facilitation and mediation at an early stage. This is a really positive step forward as it will reduce the need to raise a formal grievance in most cases.

## Fair treatment at work (FTAW)

We've continued to hold FTAW meetings with Nationwide to discuss procedures, implementation and any proposed changes covering:

- Improving Performance

- Probation
- Disciplinary
- Grievance
- Ill Health Capability
- Harassment and Bullying

## Redundancies - Care-Full people change

We've been working with P&C on this new process which will enable Managers to implement and manage people changes. The Care-Full change approach is focused on aligning to these principles:

- People are treated with kindness
- People feel positively engaged
- People feel a sense of fairness
- People are treated with respect

## Redeployment

We agreed the 'People Promise' in 2020 with Nationwide agreeing not to make anyone compulsorily redundant in an uncertain jobs market. This did not mean all change programme activity ceased; employees were still put at risk but with a deferred exit date. There is more emphasis on re-training and the options of homeworking have opened up opportunities across Nationwide, which would previously have been out of reach to many due to job location.

## Employment tribunal cases

We have successfully supported a number of members with legal action but confidential clauses prevent us from sharing full details. However, members should know that this support is available and that our resolve in seeking justice is strong.

## Read more

- [Strategic Plan Section Two](#)
- [Getting Help section of the NGSU website](#)
- [Guide to dealing with change and redundancy](#)

## Representing individual members at formal and informal meetings

### Disciplinary and Improving Performance

	2019	2020	2021 (Jan-July)
Conduct	81	79	29
Capability	95	80	31
Appeals	20	22	24
<b>Total</b>	<b>196</b>	<b>181</b>	<b>84</b>

### Grievance (including, harassment and bullying; performance rating appeals)

	2019	2020	2021 (Jan-July)
Grievance meetings	109	89	22
Appeals	22	18	8
<b>Total</b>	<b>131</b>	<b>107</b>	<b>30</b>

### Other meetings

	2019	2020	2021 (Jan-July)
Redundancy dismissals	15	40	12
Welfare/Ill health	40	14	12
Fraud investigations	3	2	1
Other	18	11	9
<b>Total</b>	<b>76</b>	<b>67</b>	<b>34</b>

## Representing individual members at formal and informal meetings

**Settlements Agreements (SA) –  
Monies paid to members where legal  
assistance has been provided  
(including redundancy subject to a SA)**

2019	2020	2021 (Jan-July)
£241,155	£590,721	£178,756

**Personal Injury Claims – Compensation  
achieved for members**

2019	2020	2021 (Jan-July)
£63,911	£25,023	£51,473

# Membership

**Our strategic plan goal**  
*Recruit and Maintain Membership*

To achieve our goals and solidify our position for the future, it's essential that we continue to grow and retain our membership base. Although we have seen a fall in membership over the last 12 months, we have maintained our density at Nationwide, as the overall workforce has fallen by more than the reduction in our membership. It's been more important than ever to effectively attract new and retain existing members so that we can support them through these difficult times and strengthen our future – although it's also been much more difficult to do this, with so few opportunities to meet people.

## **The impact on membership levels through the pandemic**

Membership levels have remained above 12,000 since 2019 but have fluctuated during this term. In the first few months of 2020, membership levels increased, reaching 12,936 in August 2020. This marked increase can be attributed to the impact of non-members seeing the benefit of membership during the pandemic. The 'people promise' (the agreement between NBS and NGSU that there would be no compulsory redundancies before 31 Dec 2020, in recognition of the uncertain job market), meant that non-members saw first-hand the much-needed support NGSU provides through turbulent times. In 2021, people leaving due to redundancy has sadly become a regular occurrence every month. In July 2021, membership levels were at 12,430 – a decrease of around 500 members from the peak. There are still a number of redundancy

programmes working through consultation and notice periods, so we expect further pressure on membership numbers in the latter part of 2021.

## **Representation at Nationwide – strength in numbers**

Despite the challenging time with actual membership numbers, we've managed to hold our position in terms of percentage of employees at NBS. Membership stands at 69% of Nationwide employees, or 65% when adjusted for Pensioner and Associate members.

## **Recruitment, inductions and onboarding**

Although recruitment at Nationwide has inevitably slowed, we have continued to successfully recruit from the new joiners. NBS inductions are now taking place via Teams and although the opportunity to engage face-to-face is missed, remote sessions have meant that we've been able to attend most sessions, which has been positive. We're pleased that Nationwide have continued to support NGSU membership by sending our literature to new starters and adding an NGSU module as part of the on-boarding process.

## **Incentive scheme**

In August this year, we launched our new incentive scheme where existing members receive a £10 voucher when they recruit a new member. We really value the support our members provide in helping to grow our numbers, so we're really pleased to have implemented this as a token of our appreciation.

**Read more**

 [Strategic plan section three](#)

# Collective Bargaining

## **Our strategic plan goal**

*Engage in Collective Bargaining to Protect and Promote Members' Terms and Conditions*

In the last 2 years, our members have experienced changes both at work and personally, at a level they may never see again in their lifetimes. We've been in close contact with Nationwide throughout every proposed and implemented change, to protect our members' terms and conditions and ensure the fairest outcomes. Just some of the changes we've provided our input to include the response to Covid - including health & safety and time-off arrangements, Job Promise and focus on redeployment, a fairer approach to pay increases on promotion and people impacts from Future Legendary Service.

## **Pay reviews**

The exceptional circumstances of the pandemic had to be reflected in an unprecedented approach to the pay settlement in both 2020 and 2021. After challenging negotiations, we believe that a good outcome was achieved considering the difficult situation arising from Covid, and the impact this is having on the economy at large. A priority focus has been to address low pay and we were pleased to see the minimum hourly rate at Nationwide increase to £10ph and minimum starting salaries for Member Representatives in the branch network rise to £18,700.

## **Future of Work**

We continued to push for greater flexibility for employees in their working arrangements and engaged in discussions with Nationwide about how we could truly transform the way employees work through the Future of Work

project. The option to work 'dynamically', offers flexible working in ways that most employees could have never imagined. This new way of working comes with challenges though around health & safety, mental health, monitoring and privacy, and performance management.

## **NPF closure**

We were very disappointed that the outcome of consultations in 2019/20 was that the Nationwide Pension Fund (NPF) closed to future accrual from 31 March 2021 and would have preferred a very different outcome. Once we knew that the closure was inevitable, our efforts were focused on achieving the best possible outcome for our members. These negotiations resulted in a deferred closure date of March 2021 and a one-off £11,000 payment in recognition of the changes to the terms and conditions of employment for the active NPF members.

## **Inclusion and Diversity**

In the summer of 2020, Equality and Diversity were at the forefront of global attention after the distressing incidents we all saw took place. We were proud to have signed the Inclusion and Diversity (I&D) Joint Statement and to have also been involved in the creation of Nationwide's new I&D policy. The revised policy is simpler, more focused, and really emphasises that it's everyone's responsibility to tackle inequality, unfairness, abusive treatment, or offensive and derogatory comments. Whether someone is receiving such treatment or witnessing it being aimed at others, we all have a responsibility to stand together and deal with it.

## **Read more**

- [Strategic plan section four](#)
- [Pay review 2020 and 2021](#)
- [Inclusion and Diversity article & BLM statement](#)
- [TUC Statements - equality for LGBTQ workers](#)

## Services and Benefits

### **Our strategic plan goal**

*Maintain and develop a range of benefits and services that add value to our membership proposition*

Although the primary aim of NGSU is to protect our members' interests at work, we also know that our members want value for money through the provision of additional benefits. We have been able to offer a wide range of excellent benefits through discounts and special offers with providers across the UK. The income we receive from the subscription draw makes an important contribution to our income and although other commissions we receive are minimal, the ability to offer great benefits is mutually beneficial for both the NGSU and our members.

### **Subscription draw**

The monthly subscription draw gives NGSU members the chance to win brilliant cash prizes, including a first prize of up to £15,000. 75% of the total entry amounts paid into the draw each month is given back to members as the cash prizes. The remaining 25% is used towards the day-to-day running of the Union. This contribution has a direct impact in helping us to keep subscription rates low. An amazing amount of £465,251 has been won by our members over the period between Jan 2020 and Aug 2021.

### **The benefits we offer**

Aside from the subscription draw, our members have access to discounts and special offers for products and services to help in different aspects of life. We have offers for life insurance, personal finance, legal help and healthcare

as well as clothing, gym membership, cinema offers and holidays. Our most popular benefits include our bespoke travel club, the insurance commission rebate scheme which paid over £100,000 commission back to members between Jan 2020 and Aug 21, and great discounts from O2 and legal services, including free wills.

### **NGSU Extras**

NGSU Extras helps members by providing a great package of savings with some of the best names on the high street, discounts for UK family attractions and reduced costs for airport parking. In June 2021, we announced that members could access NGSU Extras via a new Salary Extras app which was a big leap forward in providing instant accessibility and has seen a wide take-up by members.

## Read more

- [!\[\]\(891ae467a50cbcd6256dc7f42cbad244\_img.jpg\) \*\*Strategic plan section five\*\*](#)
- [!\[\]\(0dbab3585cc47ec99c341fade6880d5a\_img.jpg\) \*\*Member benefits\*\*](#)
- [!\[\]\(b3938d0b1de59e819c382c7d8a8025ee\_img.jpg\) \*\*NGSU Salary Extras\*\*](#)
- [!\[\]\(4649ff06baea9bebe14f42cc103576c3\_img.jpg\) \*\*Travel Club website\*\*](#)
- [!\[\]\(3a3e0439a3866319f09d7ca2e3773f29\_img.jpg\) \*\*Subscription draw winners and prize amounts\*\*](#)

# Communication

## **Our strategic plan goal**

*Develop a communication strategy that informs, activates and empowers Members and Representatives*

Communicating effectively with our members and Reps is vital to our success in fulfilling our purpose as a Union. Through a range of communication channels, we keep people updated, gauge opinions through two-way dialogue, and inspire lively, productive debates. One size doesn't fit all when it comes to communication, so we have to consistently evaluate our strategy to move with the times and keep people engaged. We've also developed our communications approach, which the pandemic has obviously made all the more necessary.

## **Evolving our communications approach**

We committed to and delivered, regular updates which have been really well received. Union Mail which was once a paper-based only communication is sent electronically by email with links to previous releases on the website. This creates a full library of information as well as being a positive move forward for our environmental impact. With the support of Unions 21, we've refreshed our whole communications and social media strategy. With social media becoming one of the preferred ways for people to communicate, we have seen an increase in content and followers on our Facebook page.

## **Branch survey**

In June 2021, we released a branch survey to understand the experience of employees through the pandemic. The topics covered were working arrangements, wellbeing, pay and performance,

recognition, safe to speak, inclusion, FLS, and their experiences of NGSU. The outputs of this survey have been incredibly important in shaping future discussions with Nationwide and understanding how we can continue to support branch-based employees, and we would like to take this opportunity to reiterate our thanks to everyone who completed it.

## **Inspiring two-way conversations**

With the removal of face-to-face meetings with our Reps, we quickly moved to online communications and meetings. It was critical to maintain regular and effective communication channels with our Reps so that they knew they were supported. Our forum has been a really good channel for inspiring two-way conversations with members. It's been a lively source of debate with the ability to exchange views and to be open about the challenges they were facing. Many of the issues raised have been taken up with Nationwide, and changes have come about as a direct result.

## **Read more**

- [Strategic plan section six](#)
- [Main communications \(use drop down menu from the News header\)](#)
- [Members' forum](#)

## External Relationships

### **Our strategic plan goal**

*Develop and maintain relationships with appropriate external bodies*

To meet our obligations to members and to create a stronger Union, we can't operate in isolation. We have always built and maintained effective relationships with other Trade Unions and external bodies, and over the last 2 years, these relationships have been a great source of support for the NGSU team. We've made use of webinars and training from many sources and found it helpful to be able to compare the approach of different employers to Covid and identify common issues among us.

### **TUC**

The TUC exists to make the working world a better place for everyone and brings together more than 5.5 million working people through 48 member Unions. The TUC has played an important role in shaping the response to Covid, actively lobbying for the furlough scheme and campaigning on health & safety issues. NGSU has supported the TUC's response on Race Commission Report and LGBTQ+ rights. NGSU Representatives have attended TUC conferences for Black, disabled, LGBTQ+, women and young workers. These conferences and their elected committees guide the General Council and Congress in setting policy on relevant equalities issues.

### **Unions 21**

Unions 21 is a forum for unions to explore shared challenges, bringing together Unions from across the public and private sector to

learn from each other, to debate issues and to share ideas. They offer practical support including masterclasses and training, which we utilised by receiving support from them with our communications plan and social media strategy, as well as a number of webinars with guests from Unions and universities around the world.

### **Alliance for Finance (AFF)**

We re-joined the Alliance for Finance as it is the only UK federation of trade unions, staff associations, and employee organisations which represents workers in UK financial services. It has been really useful to be able to benchmark and compare approaches to homeworking and the pandemic across the financial industry.

### **Other affiliations**

Over the last 2 years, we've continued our affiliations with Amnesty International, War on Want and Justice for Columbia.

## Read more

- [Strategic plan section seven](#)
- [TUC - https://www.tuc.org.uk/](https://www.tuc.org.uk/)
- [Unions 21 - https://unions21.org.uk/](https://unions21.org.uk/)
- [AFF - http://www.alliance4finance.org/](http://www.alliance4finance.org/)

## Operations Resources

### **Our strategic plan goal**

*Ensure effective use of operational resources*

To secure a strong foundation for the future, we need to have an effective and efficient approach to managing our operational resources. Our strategy combines a strong focus on managing our accounts and assets effectively with playing our part to support environmental and charitable endeavours.

### **Accounts and assets**

► We take a prudent approach to managing the Union's finances. We keep expenditure within income raised by member subscriptions (subs and draw) and ensuring the majority of expenditure is focused on providing services to members. One of the few positives from the pandemic has been the reduction in costs from meetings, leading to a surplus for 2020 of £209K (£29K in 2019).

► NGSU Asset Management – This company makes dealing with the administrative processes involved in holding assets much more straightforward. It is wholly owned by the Union, and its Directors are all selected by, and report to, the National Executive Committee.

► Staff changes at NGSU - We created a new management structure in 2020, following the retirement of Tim Poil (GS) and Marian Dean (AGS). We have invested in supporting the development of our team, including unconscious bias training, dispute resolution and mental health first aider training.

► Future operations – We will continue to embrace opportunities for remote working. The use of technology has improved participation in regional council meetings and opened new communication channels. We will continue to secure cost savings by reduced travel, also supporting our approach to sustainability

### **Doing our bit for the environment**

The massive expansion of remote working has inevitably led to reduced travel, which has been a positive step forward for our efficiency as a team and our environmental impact. We've also focused on creating more digital communications to further reduce our environmental impact. We send the Rapport magazine using a 100% compostable and eco-friendly polywrap that's produced from potato starch. We are passionate about supporting the local economy so use local suppliers for goods and services wherever possible.

### **Read more**

- [Strategic plan section eight](#)
- [Annual Accounts](#)

## Operations Resources

### **Our strategic plan goal**

*Ensure effective use of operational resources*

### **Supporting charitable causes**

Our charitable fund has been running since 2005 and enables us to make donations recognising our wider responsibility to the national and international community.

- David Hopkins Trust - NGSU members can apply for an award of up to £500, to help fund their personal development and support to activities they do in their local community. Previous awards have been given to members to fund sports coaching and leadership and training for youth groups.
- Toilet Twinning – We've twinned our toilets in the offices at Middleton Cheney with Bangui District in Central African Republic. With almost 900 children dying every day from diseases linked to dirty water and unsafe toilets, this was a cause we were passionate about supporting.
- SPRING – We've supported this charity in the Bournemouth / Poole area which provides emotional and practical support to bereaved parents and families following the loss of a baby at any stage of pregnancy, at or just after birth, whatever the circumstances and however long ago.
- Most recently, we've made donations to the India Covid Appeal and supported a member in fundraising for the Guide Dogs for the Blind Association.

### **Read more**

- [Charitable Reserve – list of donations](#)
- [Rapport magazine wrapping](#)
- [Twinning toilets](#)

## Final thoughts from Nic Sellars, NGSU President

As we reach the end of this term's report, I want to extend my and the National Executive Committee's (NEC) thanks to the NGSU team and network of Reps who have worked incredibly hard to support our members through these challenging times. NGSU has played a significant role in continuing to shape and influence the working environment for our members in the most difficult circumstances and all with a new management team at the helm. The work of our full-time team is supported brilliantly by our network of Reps who step in to resolve issues in their business areas and support their colleagues with unwavering commitment.

The role of the NEC is to oversee the day-to-day operation of the Union and implementation of Union policy. We produce this report, as part of our National Conference, giving members an insight into the work we do on their behalf.

As a Union, we always aim to work in partnership with Nationwide – we believe this approach results in better outcomes for our members. This can mean that the work of the Union isn't always visible, but as President I see how hard the team works behind the scenes to challenge Nationwide and I know that we continue to be a positive force for the benefit of our members.

Looking ahead to the future, the one thing that is certain is that we can expect more change as Nationwide responds to changing consumer demands and competition in the financial services market. This will mean that traditional ways of working will change too and we're already seeing the role of the branch network evolving to deliver

services across a range of distribution channels. There will be more automation and self-service initiatives which will change administration functions and the business will need to invest in supporting employees to acquire new skills to remain a leading provider of financial services. The new ways of working will bring opportunities too – the potential for a better work-life balance and opening up career paths that have previously been limited by location. This all means that the role of NGSU has never been more important and the NEC will work with the Union team to ensure we remain a relevant and respected voice for all our members.

Before closing out this report, I want to remind all our members that the Union is here for you no matter what challenges are faced in the future. Please make use of the services we provide and participate where you can; whether that's seeking individual help with work issues, telling us about the issues you think we should be working on, joining in with the chat on our forum or using the range of benefits and discounts we provide.

Our strength is in our collective voice. As we move ahead to new times, please encourage your colleagues to join NGSU and keep our voice strong.



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