



**ngsu**

# **National Conference 2023**

**Strategic  
Plan  
2024-2025**

## Introduction

NGSU is an independent trade union dedicated to protecting the interests of our membership, primarily within the Nationwide Group. We have provided an effective and constant voice on behalf of our members for over 50 years. We have had a Strategic Plan since 2009 to define our purpose and identify the areas of our operation which underpin and support our mission, and this has been refreshed every five years. The previous plan period was one of unprecedented change externally and we have reacted well internally to respond to this. We have moved to a predominantly homeworking team and made the necessary adjustments to accommodate that. Whilst not without challenges, this has in fact strengthened our ability to support our members, removing the constraints imposed by geography and the need for substantial travel, allowing timely support and guidance. The impact of the pandemic has obviously been far reaching on the global economy and closer to home, Nationwide's day to day operations. As such we are seeing a reducing workforce which of course, limits our ability to grow our membership. That said, we approach the next period in good shape. We are proud of having maintained a stable membership, given the backdrop, and our financial position remains strong. We have continued to build our relationship with Nationwide following a change in CEO, and the Union and its representatives remain engaged and active across all parts of the business. And of course, there has been a change in leadership as I take over the NGSU leadership reins from Tim Rose and thank him for his tireless service to our membership.

It is safe to say that the next period comes with many challenges both for our members and consequently for the NGSU and it seems appropriate that we set our plan for two years to enable us to evolve and adapt in collaboration with the NEC. We are still operating in very uncertain socio-economic times, with cost-of-living challenges, climate change, gender issues and the impact of AI (Artificial Intelligence) on the workforce to name but a few. Membership of Trade Unions has seen a decline for several reasons over many years, and we need to work hard to appeal to a diverse membership. We have a duty to play our part and shaping the future of work, working with the Society to tackle issues in a fair and balanced way, in the best interests of our members.

### What do we want to be?

Our Vision is to make Nationwide the best place to work for our members.

### What do we want to do?

Our Mission is to protect and promote the interests of our members. We believe this is best achieved through a partnership-style relationship with Nationwide. We will strive to achieve a position where our members value the Union, actively participate in the Union, become Representatives and are our greatest advocates.

Our Values/Principles – we will act with integrity, achieving fairness and treating all with respect.

### Our core strategic aims

- ▶ Attract, recruit, and retain members
- ▶ Be the voice of our members at all levels within Nationwide
- ▶ Deliver professional advice and representation for our members
- ▶ Negotiate and bargain to protect members' T&Cs

Our core strategic objectives are interconnected and will serve as our compass in daily decision-making. None holds greater importance than any other. We will collectively establish actions to accomplish these objectives, regularly evaluate them as a senior leadership team, and continually update and review them with our NEC.

## Attract, recruit, and retain members, building a sustainable future now and in the future

Our membership is fundamental to our purpose and our success, and we remain heavily reliant on subscription income. Our credibility is based on the number of members we represent, and the ideal is to maintain that above 60% of the Nationwide workforce, which we are currently achieving. However, attitudes to union membership have evolved and Nationwide, like all businesses, is continually looking to “right size” the workforce, impacting our existing and potential membership pool. It will be crucial for us to demonstrate the value of membership, not only through the professional advice and representation we provide, but through the additional benefits available to our members. We have excellent induction sessions that play a huge role in our ability to recruit new members in distribution and we want to expand this across the Society for all new recruits. It is increasingly important for us to reach a younger demographic, which will also aid with our succession planning, and developing innovative ways of approaching this will be key. We must be more proactive in reaching non-members using our Reps as advocates as well as maximising the promotion skills we clearly have within our own team. Our communication strategy needs to evolve as we consider the objectives of all our touchpoints with members and the best medium to deliver it including how we utilise social media to best effect.

### Actions

- ▶ Create a set of personas to demonstrate the value of union membership for different lifestyles and use this to attract new members.
- ▶ Consider a referral scheme and process for attracting members from all parts of the Society including temps. Develop how we use our existing Reps and NEC members to grow our membership.
- ▶ Rebalance the subscription levels between full-time, part-time, and short-time members, consider whether there is a suitable alternative model for setting fees.
- ▶ Complete a review of the benefits available and take appropriate actions to improve the range of what is available and how we promote it.
- ▶ Review our comms strategy, who is involved, our objectives and how we can deliver it.

## Be the voice of our members, engaging in appropriate social dialogue with the Society and beyond

To be a progressive union that represents our members well we need to engage in topics that are important to them, now and in the future, as well as championing the things that matter at work. The central team is only able to do this because we have a fantastic network of NGSU Reps across the operation. The Reps have a pivotal role as they often have the best knowledge and understanding of the issues impacting our members and this role should also provide great opportunities for succession planning into the NEC, Business Committees and employed roles within NGSU. We harness our partnership relationship with the Society to allow our Reps to be fully engaged in their roles and have the appropriate levels of time off to do this. We will continue to protect and promote the interests of our members in respect of Equality, Diversity & Inclusion working to make sure everyone is treated with fairness and dignity, including within our NGSU team. Health & Safety in the workplace is also key and whilst the Society is deemed low risk, we feel there is work to do to understand the challenges our members face, being particularly alert to those related to new ways of working. There are also social issues that we are starting to address with distinct strategies on the green agenda and menopause for example, and we will utilise feedback from our members to guide us. We will take time to consider all our communication channels not only in the way we provide information but also the best way for us to receive representative feedback from our members to enable us to 'hear their voice'. We will work with the Society on existing and new legislation to protect our members, with the aim of persuading the Society to exceed, rather than simply meet, its minimum obligations, continually developing and evolving the range of policies that affect our members to make the employment experience a more positive one.

### Actions

- ▶ Review ED&I strategy with the NEC and ensure we have mechanism in place to grow and evolve.
- ▶ Review our involvement with the employee networks and ensure we have effective engagement with all groups.
- ▶ Review our approach to our social dialogue agenda – who is our NBS stakeholder? Do we need support from within NGSU?
- ▶ Progress wellbeing audits with the Society to consider mental wellbeing in addition to physical.
- ▶ Share information and review involvement with external bodies/affiliates at NEC meetings.
- ▶ Work with key stakeholders in Nationwide and other unions to understand how we have a voice in the future of work and other workplace challenges (e.g., AI, VAB, Hybrid working).

## **Deliver professional advice and representation for our members, supporting them when they need it most**

This is an essential part of our proposition for members and provides a direct benefit of their membership that they cannot obtain elsewhere. Our experienced team provides confidential and timely support when our members need it and the feedback received from members and from the Society reinforces this. We are a small, not-for-profit organisation, with a duty to our members to manage our resources well and this is one of the most significant ways that we can reach our membership, delivering excellent service. Changes to the Society's strategy can have an immediate impact on workload and we need to consider the best and most effective ways of using our NGSU and Rep resources to support our members in the future. Our team also provides tailored advice on employment matters and employment laws, with expert advice available from our legal advisers if required. The union has an established working model which is underpinned by a strong financial balance sheet, notwithstanding there are decisions to be made about the model as we move into the plan period.

### **Actions**

- ▶ Ensure we are set up for success and fit for the future by reviewing the current structure.
- ▶ Determine the best way to deliver our Head Office functions and operating office and take appropriate actions.
- ▶ Develop a succession plan through effective career conversation and opportunities for development that also adds value to NGSU.
- ▶ Support the Rep network through our Rep Support Officer and agree actions to set expectations for our rep team.
- ▶ Establish a mechanism to review the effectiveness of Reps and ensure training is provided where appropriate.
- ▶ Include ways of providing feedback to Society line managers to reinforce the benefits of the role.
- ▶ Draw up a schedule of events for the year and gather support to run the sessions. Review the current Disciplinary Officer situation and put steps in place to increase/train as appropriate.

## Negotiate and bargain to protect members T&Cs, using 3rd party relationships to good effect

We have sole bargaining rights and a recognition agreement that provides us with a framework to work with the Society on key issues relating to Terms and Conditions, including a documented internal and external dispute resolution process. Whilst the agreement may be outdated in part, it is a fundamental strength for us, and we need to help our members understand what it means and the benefits it provides us with. Our relationship with the Society is grounded on a partnership approach and whilst this has inevitably been challenging at times, our success comes from having effectively navigated our way through numerous changes in leadership and culture. This remains our preferred approach for how we continue to work together to find solutions that are acceptable to all involved, using our expertise and representing and sharing employees' views and experiences through our members' feedback via the Employee Involvement Committee (EIC) and the series of joint committees and working parties which have been established. Our access to Nationwide's leadership has changed over time and we are currently reviewing whether our meeting structure is fit for purpose or whether changes need to be made. Our team is recruited from within the Society, providing us with lived experience and an understanding of the business, its challenges, culture, policies etc. Our experience also means we have a collective memory that aids our support, challenge, and negotiation with senior leaders. We continue to build a strategic alliance with other Unions within the financial sector, to share information and best practices for the good of our members. We are clear that we will remain an independent voice, and although we are not affiliated to any political party, we will work with other external bodies (such as the TUC, the Alliance For Finance, Unions 21) to understand industry challenges and leverage any research and training opportunities these relationships provide to support our discussions where appropriate.

### Actions

- ▶ With Nationwide, review the EIC and business committee meeting structure.
- ▶ Encourage active involvement from NGSU team and NEC members with external bodies.
- ▶ Educate our members on what the recognition agreement means to develop understanding.
- ▶ Continue to maximise our partnership relationship with Nationwide referring to/and reviewing the recognition agreement where appropriate.
- ▶ Consider our ongoing strategic review with other unions in the financial sector and how we can maximise benefits of our relationship with them.