



2023 Annual Report

Introduction



2023 was another difficult year for the country and for our members. The disastrous consequences of Liz Truss' mini budget in 2022 continued to have a negative impact on workers' daily lives. The crisis has disproportionately affected the lowest paid and its effect was strongly conveyed in our annual Cost of Living Survey. The results of the survey demonstrated the extent to which living standards have deteriorated and with no indication of action from the Tory Government, the situation remains perilous for many of our members.

Poor employment rights and insecure work underlie the cost of living crisis. The next general election will be our chance to deliver on Labour's commitments in their transformative New Deal for Working People. The new deal will be a significant expansion of employment rights and crucially it will strengthen trade union rights, helping more people to benefit from the power of strong unions in their workplace.

Throughout the year, Usdaw worked with the Labour Party, primarily through the National Policy Forum process, to focus on what the next Labour Government can do to improve the lives of Usdaw members. These constructive discussions led to significant policy decisions to tackle insecure employment, poverty pay and poor mental health. Usdaw will continue to engage with Labour on the shared policy platform in the approach to the next general election.

The 'New Deal for Workers' Campaign influenced our bargaining agenda throughout the year, as negotiators made representations for improvements to pay and conditions for workers in all sectors where we organise. The Union has continued to make the case for pay deals that keep pace with the cost of living and inflation increases.

The Union's 'Freedom From Fear' Campaign continued the call for retail workers' protection from violence, threats and abuse. As a result of our work with the Labour Party, we have a pledge that they will deliver on the aims of our campaign in Government; 13,000 more neighbourhood police with guaranteed patrols in town centres; Respect Orders to ban repeat offenders from town centres; a standalone offence for assaulting a public service worker and an end to the £200 threshold for investigating and prosecuting shop theft. Our annual Respect Week was packed full of activity, including events in hundreds of stores across the country, more than 50 MPs and Police Crime Commissioner store visits and a Parliamentary reception.

The Union's equalities work has continued to go from strength to strength. There was overwhelming support from reps for our new menopause campaign, as well as the Show Racism the Red Card and hidden disabilities campaigns, the national mental health campaign day and record levels of engagement with the Parents and Carers Spotlight Day, which was themed on childcare.

The Union launched an exciting new development programme for Black members, Breaking Down Barriers, in 2023. We know that Black members are under-represented in the Trade Union Movement and the programme intends to give participants the opportunity to develop the knowledge, skills and networks they need to become active and more visible in Usdaw.

The retail sector continued to encounter difficulties as nearly 120,000 jobs were lost in the sector and over 10,000 shops closed for the last time during 2023. The Union continues to support members who face restructuring and redundancy, and we are also making the case for urgent Government action to support retail jobs. Our report, A Plan for the Future of Retail Work: Ensuring Retail Jobs are Better Jobs, detailed a groundbreaking new plan for the future of retail work that addresses the urgent priorities facing workers, as well as wider measures to help deliver better jobs across the sector.

In 2023 the Union held its first ever National Retail Workers' Day, with excellent support from reps across the country. The day highlighted the important role that retail workers, particularly Usdaw members, play. Usdaw activists held regional events in stores and shopping centres and asked the public to show their support for shopworkers and share the message that 'retail workers are at the heart of our communities'.

Our Recruitment and Organising Strategy made some positive steps in 2023. Union membership grew by 4,000 members to more than 360,000 - this was the first time our membership has increased since 2015. We recruited 91,440 members, an increase of more than 8,500 on the previous year. Although this is a great achievement, there is plenty more work to be done rebuilding our industrial strength to ensure the Union can deliver for members. Our reps do a fantastic job recruiting, advising and representing members and the Union will continue to develop their knowledge and skills.

With the next general election approaching, our political organising will intensify. Usdaw has a Key Seat Strategy designed to support members to make a difference where it's desperately needed. I encourage our members to be part of Labour's campaign, out on the streets either in your own constituency or as part of Usdaw Key Seat Campaign Teams across the country.

We have a crucial year ahead of us which will be our opportunity to secure real change for members. The year will not be without its challenges, however by working together we can continue to build a strong union movement to win decent work, fair pay and dignity for all workers.

We would like to express our sincere thanks to all Usdaw reps, members and staff for all they have done to support the Union throughout the year.



Paddy Lillis
General Secretary



Jane Jones
President

Important note

Delegates and Branch Secretaries who require information on the Annual Report or on the Financial Statements should send questions to Head Office at least SIX days prior to the Annual Delegate Meeting, so that a full reply can be provided.

Summary of Union Membership and Finances

Summary of Membership

Membership at 31 December 2023

Industrial Membership	360,394
Political Membership	294,413
Sata Membership	6,084

Membership Movement - 12 Months to 31 December 2023

New Members Enrolled	91,440
Increase in Membership	3,742
Number of Branches	406

Membership by Gender

	Membership	%
Female	190,286	47.13
Male	169,845	52.80
Mx	263	0.07
Total	360,394	100.00

Membership by Contribution Scale

	Membership	%
A	234,762	65.14
C	118,301	32.83
FM	3,818	1.06
SM	3,513	0.97
Total	360,394	100.00

Membership by Region

	Membership	Increase/(Decrease) 12 Months to 31 December 2023
South Wales and Western	43,894	1,258
Eastern	51,518	(132)
Midlands	48,164	711
North Eastern	50,347	(176)
Scottish	37,700	1,156
Southern	51,135	1,201
North West	77,636	(276)
Total	360,394	3,742

Membership by Country

Northern Ireland	13,848
Scotland	37,700
Wales	21,268
Total	72,816

Summary of Financial Results

Income and Expenditure – 12 Months to 31 December 2023

General Funds

	£000s
Contribution Income	35,133
Other Income	337
Total Income	35,470
Provision of Benefits	(690)
Legal Costs	(389)
Personnel Costs	(19,998)
Operating Expenditure	(11,850)
Total Expenditure	(32,927)
Operating Surplus	2,543
Investment Income	5,744
Net interest on defined benefit pension liability	(563)
Surplus	7,724

Branch and Federation Funds

	£000s
Contribution Income	3,740
Other Income	121
Total Income	3,861
Expenditure	(4,070)
Transfers	(52)
Deficit	(261)

Political Funds

	£000s
Contribution Income	1,522
Total Income	1,522
Expenditure	(1,445)
Transfers	(1)
Surplus	76

Regional Recruitment Funds

	£000s
Expenditure	(63)
Transfers	52
Deficit	(11)

Net Assets – 31 December 2023

	£000s
Fixed Assets	102,272
Current Assets	7,739
Creditors	(2,030)
Net Assets (excluding pension liability)	107,981
Pension Liability	(20,738)
Net Assets (including pension liability)	87,243
Allocated to:	
General Funds	72,422
Branch and Federation Funds	13,325
Political Funds	1,460
Regional Recruitment Funds	36
Total	87,243

Environmental Commitment

Intent and Strategy for Usdaw

It is Usdaw’s intent to be an environmental champion that makes a positive impact towards the global environmental commitment. Usdaw recognises that it shares a common responsibility in its operations to minimise the environmental impacts associated with the activities and services that are provided to the membership.

Strategic Oversight

The strategy for Usdaw is to reduce the organisational carbon footprint through various pragmatic and initiative-taking approaches that will protect the environment and continue to deliver excellent value for money to the membership.

Operational Review

Usdaw’s operational impacts are regularly discussed at management and departmental levels. Consideration is given to how Usdaw can improve within its operations and the impacts that Usdaw activities may have on the membership experience.

Reviewing the Usdaw energy supply portfolio has been a balance of considering operational cost and that of striving towards a lower carbon footprint. Usdaw’s current energy supplier is EDF, who in a report by HM Department for Energy & Net Zero, is Britain’s largest generator of zero-carbon electricity, this approach is contributing towards the UK striving towards net zero by 2050.

Estates Management

Usdaw has considered its energy use on the Usdaw property estate. Operationally, Usdaw is currently undertaking an estate refurbishment and refresh where energy saving approaches are being actively implemented. Active implementation can range from energy efficient lighting to replacement of the physical environment such as windows and climatic control systems. Energy consumption on average across the estate has dropped by 14% or 22,079 Kwh (equivalent to just over six households per year – Department for Business, Energy & Industrial Strategy) showing a reduced carbon footprint and increased value for money for the Usdaw membership.

Delivery of Services

The Usdaw motor vehicle fleet has historically been powered by fossil fuel burning internal combustion engines (ICE). A programme has started of refreshing the Usdaw vehicle fleet at the end of the vehicle economic and operational cycle. Cleaner and leaner burning Hybrid variants (where local constraints exist) or fully electrically powered motor vehicles are being commissioned, enabling the environmental delivery of frontline member services, delivering a CO2 saving, whilst covering mileage that is equivalent to going around the earth 2.8 times.



CO²e saving (kg)
24,687



Total electric miles
112,600

Procurement Strategy and Deployment

Usdaw has considered a refreshed approach to how the internal supply chain processes are managed. This has resulted in refreshed ways of obtaining goods and services used for the day-to-day activities, avoiding multiple hand-offs throughout the operational delivery of member services. Green strategies, such as considering refurbished stock items, have added value to Usdaw’s environmental credentials of making a positive impact towards the global environment, whilst supplying the membership with value for money.

Administration

Union's Staff

The Union's staff at 31 December 2023 totalled 344, of which 208 were women and 136 were men, as listed below:

Head Office	Men	Women	Total
Central Officials	4	-	4
National Officers	4	2	6
Heads of Department	3	3	6
Deputy Heads of Department	3	5	8
Designated Officers	16	7	23
Lifelong Learning Project Workers	-	2	2
Clerical Staff (full-time)	37	42	79
Clerical Staff (part-time)	-	16	16
DDH/Clerical	-	1	1
Ancillary Staff	6	6	12
Total	73	84	157

Regional and Branch Offices	Men	Women	Total
Regional Secretaries	5	2	7
Deputy Regional Secretaries	5	2	7
Area Organisers	51	35	86
Clerical Staff (full-time)	2	64	66
Clerical Staff (part-time)	-	16	16
Ancillary Staff	-	5	5
Total	63	124	187

During the year a total of 59 members of staff left the Union's employment for a variety of reasons.

The National Executive Council placed on record their appreciation for the long and conscientious service of the following members of staff who retired:

Name	Position
Alison Bickers	Senior DTP Operator/Artworker, Media and Communications
Lisa Boodle	Branch Office Manager, Faversham
Cath Carroll	Senior Contributions Administrator, Records
Susan Coutts	Area Organiser, Glasgow
Elaine Cragg	Administrator, Newcastle
Kate Cumming	Area Organiser, Aberdeen
Jean Ferguson	Branch Office Manager, Newcastle
Tom Gibson	Senior Membership Administrator, Records
Carol Gill	Secretary to the Executive & Administration Officer
Dave Gill	National Officer
John Gorle	National Officer
Debby Hudson	Area Organiser, Andover
Sarah Hughes	Area Organiser, Redditch
Nick Ireland	Regional Secretary, South Wales and Western Region
John Kane	Caretaker, Maintenance
Sue Langworthy	Training Officer, Waltham Cross
Angela Leigh	Assistant Catering Manager, Catering Services
Pat Markey	Senior Administrator, Warrington
Ciaran Matthews	Maintenance Officer, Maintenance
Julia McAdam	Senior Accounts Administrator, Accounts
Christopher McLaughlin	Researcher, Research and Policy
Melanie Mulligan	Senior Administrator, Warrington
Jim O'Neill	Area Organiser, Warrington
Barbara Piskulak	Administrator, Kegworth
Juliet Puxted	Administrator, Faversham
Steve Robinson	Benefits Supervisor, Benefits
Linda Short	Administrator, Warrington
Gail Stewart	Administrator, Redditch
Shelley Vaughan	Area Organiser, Leeds

The following appointments were made during the year:

Name	Position
Bally Auluk	National Officer
Caroline Baird	Lifelong Learning Project Worker, Glasgow
Liam English	Area Organiser, Belfast
Robert Francis	Area Organiser, Morden
George Fry	Area Organiser, Plymouth
Gabriel Grigoras	Area Organiser, Aberdeen
April Harris	Area Organiser, Waltham Cross
Danny Jovicic	Area Organiser, Bristol
Kate MacLeod	Area Organiser, Redditch
Mike Malocco	Area Organiser, Waltham Cross
Darren Matthews	National Officer
Stuart McConnell	Training Officer, Waltham Cross
Michaela Parsons	Area Organiser, Leeds
Milan Pavlik	Deputy Regional Secretary, South Wales and Western Region
Ryan Piper	Area Organiser, Andover
Sucha Singh	Training Officer, Morden
Mike Walker	Regional Secretary, South Wales and Western Region
Lewis Wheatley	Area Organiser, Leeds
Emma Woodfine	Area Organiser, Bristol
Angelika Zywocinska	Area Organiser, Morden



Remembrances

During the year the National Executive Council noted with deep regret the deaths of:

Sylvia Bertenshaw	former Supervisor, Publicity and Public Relations Department, Central Office
Thomas Brooke	former Supervisor, Liverpool
Robert Cockle	former Area Organiser, Ipswich
Graham Hughes	former Area Organiser, Manchester
Theresa Leonard	former Cleaner, Central Office
Christine Richardson	former Area Organiser, Cardiff
Edna Simms	former Area Organiser, Hitchin
Sylvia Wall	former Accounts Clerk, Leeds

References must also be made regarding the deaths of numerous members during the year, many of whom gave loyal service and devotion, not only to the Union, but also to the wider Trade Union and Labour Movement.

Industry Reports

Retail Crisis

In 2023, the retail sector continued to face significant challenges as the cost of living crisis intensified a number of systemic problems facing the sector.

The Centre for Retail Research (CRR) has pointed to a significant number of shops closing in 2023. The CRR reported that over 10,000 stores closed down during the year. This included outlets at some high profile retailers such as Argos, Sainsbury's, Paperchase, Wilko, M&Co, McColls and Victoria Plum. The number of retail jobs lost, in stores and online, also jumped significantly with almost 120,000 jobs lost by the end of the year.

Retail staff need and deserve to be given a much better and fairer deal for the sector to prosper. As such, Usdaw is calling for a plan for the future of retail work, including:

- Better pay and secure work, based on a genuine living wage and the other calls of Usdaw's 'New Deal for Workers' Campaign.
- The delivery of a new economic framework with fundamental reform of business rates.
- Support with retraining and upskilling, with a strong focus on skills and development in the context of technology/automation and the transition to net zero.
- Fair treatment and equality for all retail workers.
- Stronger protections for retail workers, including a protection of workers' law on violence and abuse against shopworkers, which already exists in Scotland.

Economy

In 2023, the UK economy narrowly avoided a recession, but high interest rates and high inflation remained key obstacles to economic growth.

According to the Office for National Statistics (ONS), Gross Domestic Product (GDP) was estimated to have shown zero growth in the third quarter of the year, following on from 0.2% growth in the second quarter. It is clear that the Tories' economic mismanagement is continuing to hold the economy back, and it is working people who are paying the price.

High interest rates had a knock-on impact on business investment with the Bank of England's Decision Maker Panel Survey estimating that the level of interest rates would reduce business investment by 8%. The Prime Minister met his target of halving inflation, but in November the Bank of England cut its growth forecasts for 2023, with zero growth predicted for 2024.

Concerns over international developments pushed up the price of oil, raising the prospect of prolonged high prices for consumers at the pump. Paul Dales, Chief UK Economist at the consultancy Capital Economics, said "The new risk though, is that events in the Middle East restrain how far inflation falls next year."

Pay Bargaining

At the end of the year, the median pay settlement stood at 6.7%. The weighted average stood at 6.47%. The weighted average accounts for the number of workers covered in each settlement and is significantly affected by pay deals, which cover a large number of members. It should be noted that these average figures represent the increase on the basic rate only, whereas pay deals are often more complex than this.

Many pay settlements are influenced by increases in the National Minimum Wage (NMW). In April 2023, increases of between 9.7% and 10.9% were applied to all NMW rates. As the minimum wage rose fast, there was increased pressure on negotiators to preserve the gap between Usdaw employers and 'minimum wage employers'.

In November 2023, the Government accepted the recommendations of the Low Pay Commission for a 9.8% increase to the National Living Wage (NLW) to £11.44 for workers, effective from April 2024. This rate will apply to workers aged 21 and over. The 18 to 20 year old rate will increase to £8.60 and the 16 to 17 year old rate, as well as the apprenticeship rate, will increase to £6.40.

Separately to the NLW, in October 2023, the Living Wage Foundation announced a 10% increase in the real Living Wage, making the new rates £12 per hour and £13.15 in London for over 18s. The real Living Wage rates, which are based on an individual's cost of living, show that the Government's so-called 'National Living Wage' is nothing of the sort.

Udaw has successfully secured guarantees from the Labour Party to introduce a genuine living wage when in Government, and we continue to call on the Conservative Government to tackle in-work poverty.

Organising

2023 was another challenging year, yet despite this, there were some positive developments with the Union increasing overall membership levels. This was due to a number of factors, including a significant reduction in leavers, the lowest levels since 2016. The number of reps across our key agreements stabilised following a previous significant drop post-Covid.

However, the number of non-members across all our key agreements remains significant and there is more work to be done. It is vital that we continue to focus on recruiting non-members who work within existing agreements, while also looking for opportunities to establish new agreements. The more members we have, the greater our voice. It is, therefore, essential that everyone in the Union redoubles our efforts to deliver the organising agenda and ensures membership growth during 2024.

Key Issues in 2023

Cost of Living Crisis

The cost of living crisis continued to have a devastating impact on low paid workers. While inflation dropped marginally, there was little sign of the pressure on working people easing as wages continued to lag behind rising prices, dragging living standards down.

Our Cost Of Living Survey highlighted the extent to which living standards deteriorated showing that:

- A staggering 81.5% of members felt worse off than they did in 2022.
- Nearly a third of respondents said they struggled every month, compared to just over 7% at the beginning of 2021.
- 70% of people struggled to pay bills at some point in the past year.

Low Pay and Insecure Work

Low pay and insecure work continues to be a significant issue for members. This is why we need a new deal for workers that provides the highest possible increase to the minimum wage and more secure employment.

Usdaw is calling for a new deal for workers based on:

- The introduction of a genuine living wage.
- A minimum contract of 16 hours per week for everyone who wants it.
- A contract based on an individual's normal hours of work.
- A ban on zero-hours contracts.
- Statutory Sick Pay for all workers from day one at their normal rate of pay.
- A fundamental overhaul of the failing Universal Credit system.

Technology and Automation

Developments in technology and automation remained a growing concern for members, particularly in regard to a lack of consultation with staff and the failure by some employers to invest in training and development. Usdaw continues to push for:

- Protection against the unequal impact of new technologies across the workforce, including robust safeguards against discrimination.
- High quality training provisions to support employees and employers in retraining and upskilling.
- Developing a proper legal framework to protect workers' rights, including a legal right to consultation, rights over personal data and the right to switch off and disconnect from work.
- Delivering a true voice for workers, to give them a say on the introduction of new technologies at work, including strengthened trade union rights.
- Promoting best practice in safeguarding against excess monitoring and surveillance at work.



Chemical and Pharmaceutical

Usdaw's Presence

Usdaw has a significant membership and collective agreements at a national level with a number of pharmaceutical companies. These include Alliance Healthcare, Well Pharmacy, Phoenix Healthcare, AAH Pharmaceuticals and Boots Logistics.

At regional level, Usdaw continues to have considerable membership in large workplaces, such as Unilever's manufacturing sites at Port Sunlight and Leeds. The Union also has membership at various smaller manufacturing sites.

Developments in the Chemical and Pharmaceutical Sector

There has been a lot of downward pressure in the pharmaceutical sector in the last year. The costs of the manufacturing of pharmaceutical goods has been affected by inflation, leading to higher costs for pharmaceutical companies. However, the nature of the contract for providing drugs to the NHS means that this cost cannot be passed on to the customer. This, therefore, has a big impact on the profitability of pharmaceutical companies in the UK. There has also been a shift in the ordering habits of pharmacy customers, rather than ordering from one company they are being smarter in their orders, buying different products from the cheapest sources. Again, this has a knock-on effect on pharmaceutical companies with deliveries going out with fewer items, but still making the same number of stops, meaning higher overheads with less sales. The shortage of trained pharmacists has made it difficult for the industry, and significantly increased costs.

These pressures have led to a number of high street pharmacies being put up for sale, as these companies try to consolidate their services. A large number of these have been picked up by independents and small chains.



Pay and Conditions

During the year, a number of pay settlements were agreed following negotiations with Usdaw and ballots of our members:

- **AAH Pharmaceuticals** – Following negotiations an offer was put to the membership, which was accepted, with 59% voting in favour. Warehouse days saw an increase of 7.4%, and Warehouse nights, FLT days and nights, drivers and the drivers Saturday rate, LGV Drivers, LGV Saturday rate and LGV night rates, and salaried Collective (Admin, Call Centre etc) received a 6% increase. First Aider and skills payments increased to £450 from £300.41 per annum.
- **Alliance Healthcare/Alloga** – Pay negotiations with the company began in February. Discussions were long and protracted with a number of offers being put to the membership and subsequently rejected. As a result of the difficulties in achieving an acceptable offer, discussions were also held through Acas, which unfortunately did not result in an acceptable offer. Following rejection of the company's offer made through Acas discussions, it was agreed to meet one last time. This meeting resulted in a final offer, which Usdaw put to the membership. This offer was for a 40p increase for drivers from April, with a further increase of 50p from October, giving a total increase of 90p for drivers. The warehouse staff were offered a 70p increase from April, with a further increase of 30p in October, giving a total increase of £1. This offer was accepted by 59% of the membership and the improvements implemented by the company.
- **Boots Logistics** – Following negotiations, an offer was put to ballot and accepted by 55% of the membership. The new pay deal saw a 9% increase for Warehouse Operatives and a 12.5% increase for the Jambusters' pay. The deal also gave double-time for second generation contracts, who work between 1 June 2023 and 15 January 2024, and an extension of the canteen subsistence until March 2024, along with a one-off payment of £100.
- **Phoenix Healthcare** – The company's initial offer was rejected by the membership. A second deal was negotiated, leading to a two part deal with a total exit rate increase of 9.45%-10.46%. As part of these negotiations, new colleagues joining the business from 1 May 2023 will have three waiting days before being eligible for company sick pay. The second deal was put to ballot and accepted by 57% of the membership.

The Co-operative Movement

Usdaw's Presence

At the end of the year, Usdaw had over 23,000 members covered by Co-op agreements. Membership in the Co-operative Movement includes those employed in retail, warehouse and distribution, funerals, travel, clerical, florists, and pharmacy across different societies, of which the Co-op Group is the largest.

Developments in the Co-operative Movement

Petrol Estate Sale to Asda

In 2022, the Co-op Group decided to sell the remainder of its petrol forecourt estate, totalling 129 sites and three development sites. After collective consultation with Usdaw, petrol stations have transferred to Asda throughout the year. At the time of writing, Usdaw was finalising the new agreement with Asda which will provide us with check-off facilities, recruitment and establishing rep committees. Pay negotiations for ex Co-op sites will begin early 2024.

Co-op Group

The Co-op Group strengthened their financial position in the first half of 2023. Debt was significantly reduced by £0.2 billion on the 2022 position. Net debt, excluding leases, stood at £123 million, an improvement of 83% at the same point in 2022. As a result, primarily of cost savings made in 2022, the Group achieved £43 million in underlying operating profit compared with a £1 million loss at the same point in 2022. Revenue was down at £5.4 billion compared with the first half of 2022 (£5.6 billion), reflecting the sale of the petrol forecourt business last year.

In summary, despite the decrease in revenue owing to the Group's conscious effort to right-size the business, profit and cash generation have increased significantly improving the Group's balance sheet.

Midcounties Co-operative

For the first half of 2023, the business recorded gross sales of £773.2 million, which is a 14.2% increase on the same period last year. Operating profit (before significant items) was £3.7 million. Food business performed well in the first half of the year, with like-for-like sales growth of 7%.

Central Co-operative

The Society delivered a positive performance in the first half of 2023. Gross sales increased to £532.1 million, up 4.1% year on year, despite inflationary pressures and pressure on volume. In addition, trading profit delivered £7.6 million, a slight reduction of £0.3 million (-3.8%) in the same period the year before.

Pay and Conditions

Co-op Group

- **Customer Team Members and Post Office Counter Assistants** – hourly rate increased to £10.90, representing an increase of 10.1%, effective from 1 April 2023.
- **Team Leader and Post Office Supervisors** – hourly pay increased to £12.10, which equated to an increase of 10.1%.
- **Team Managers, Store Managers and Post Office Managers** – received a matrix based increase based on a 'pot' of 6%. Colleagues who were on or above the maximum salary for their band and had a 'partially achieving' performance rating or above for 2022 also received a one-off payment:
 - For Store Managers the amount was £1,000.
 - For Team Managers the amount was £700.
- **Co-op Funeralcare – (Funeral Directors, Embalmers, Funeral Arrangers, Admin Arrangers, Funeral Service Operatives, Driver Bearers and all other colleagues paid on a 'spot salary')** – With effect from 1 April 2023:
 - Ceremonial Crew (and Driver/Bearers) received a £1 increase in their hourly rate.
 - Funeral Service Crew and Night Ambulance Crew received a 98p increase in their hourly rate.
 - Funeral Arrangers received a 68p increase in their hourly rate.
 - Funeral Directors received an 80p increase in their hourly rate.
 - Embalmers below 1,200 cases received a £1.03 increase in their hourly rate.
 - Embalmers above 1,200 cases received a £1.08 increase in their hourly rate.
 - All other roles received a 6% increase in pay, except for colleagues in a Florist, Cleaner or Catering Assistant role, who received an individual letter detailing the proposed changes to their pay.
 - Standby rates paid over Christmas and the New Year bank holidays doubled for 2023/24.



- **Co-op Group Support Agreement** – Effective from 1 April 2023, each colleague's pay increase was determined with reference to their position in relation to the salary benchmark for their role, based on a performance matrix. Therefore, increases ranged from 0-7%.

- **Co-op Retail Logistics – National Warehouse and Clerical Agreement/New Model Agreement (Carrickfergus)/Ex-Portbury Agreement/Co-op Warehouse Agreement/National Transport Agreement/Co-op Transport Agreement** – Colleagues covered by the NWCA and CWA, including ex-Portbury Wincanton colleagues and NMA/CWS (Carrickfergus) received a 6.7% increase to basic rates of pay, shift premiums and overtime with effect from the anniversary dates below:

- 1 February 2023 for all NWCA/CWA colleagues.
- 1 May 2023 for all NMA/CWS colleagues.

Colleagues covered by the National Transport Agreement/Co-op Transport Agreement received a 5% increase on basic rates of pay, with effect from 1 February 2023. This increase is applied to weekend and unsocial hours premiums within the CTA.

Midcounties Co-operative

Customer Service Assistants employed in food stores received an overall increase of 9.5% paid in the following ways:

- With effect from 1 April 2023, an increase in the hourly rate from £9.70 to £10.48.
- With effect from 3 December 2023, an increase in the hourly rate from £10.48 to £10.62.

Team Leaders employed in food stores received an overall increase of 9.5% paid in the following ways:

- With effect from 1 April 2023, an increase in the hourly rate from £10.60 to £11.45.
- With effect from 3 December 2023, an increase in the hourly rate from £11.45 to £11.61.
- With effect from 1 April 2023, the uplift in responsibility pay was increased from 50p per hour to 55p.

Co-operative Employers' Association Retail Agreement

In 2023, Lincolnshire Co-op and Chelmsford Star Co-op withdrew from the CEA Agreement to conduct their pay negotiations independently. Pay negotiations for Lincolnshire Co-op are led nationally and negotiations for Chelmsford Star Co-op are conducted regionally. Central Co-op, Heart of England Co-op and Radstock Co-op are negotiated through the CEA Agreement.

- **Central Co-op** – With effect from 1 April 2023:
 - Customer Service Assistants in food stores received an increase to £10.75 per hour.
 - Team Leaders in food stores received an increase to £12.20 per hour.

- Other roles received an increase of 5%.
- Personal Funeral Advisors (former Midcounties Co-op Role pay rate is £10.85 and the equivalent Central role is Funeral Administrator/Arranger on £10.51) received an increase to £11.39 and job title was revised to Funeral Advisor.
- Funeral Assistants (former Midcounties Co-op role pay rate is £10.51 and the equivalent Central role is Funeral Services Assistant, also on £10.51) received an increase £11.39 and job title was revised to Funeral Services Assistant.
- The minimum rate increased to £10.75 which will be applied where relevant, eg Driver Bearers and Support Centre roles.

- **Heart of England Co-op** – With effect from 1 April 2023:

- Customer Service Assistants in food stores received an increase to £10.75 per hour.
- Team Leaders in food stores received an increase to £12.20 per hour.
- Other roles received an increase of 5%.
- With effect from 27 February 2023, funeral colleagues received increases of between 5% and 14.58% dependent on role.

- **Radstock Co-op** – With effect from 1 April 2023:

- Customer Service Assistants in food stores received an increase to £10.50 per hour.
- Supervisors in food stores received an increase to £12.63 per hour.
- Post Office Clerks received an increase to £10.54 per hour.
- Drivers received an increase to £11.09 per hour.
- Other roles received an increase of 5%.

Lincolnshire Co-operative

For colleagues covered by the Retail Agreement, with effect from 1 April 2023:

- Customer Service Assistants in food stores and Post Office Counter Clerks received an increase to £10.67 per hour.
- Team Leaders in food stores received an increase to £12 per hour.
- All other Post Office colleagues received a 6% increase or a minimum of £10.67 per hour.

For colleagues covered by the Specialist Agreement, with effect from 1 April 2023:

- Managers in food stores received a 6% increase.
- Post Office Managers received an increase to £12 per hour.

Dairy Industry

Usdaw's Presence

Usdaw's membership in the sector remains strong and the Union continues to develop our relationship with major dairy employers such as Arla, Müller Milk and Ingredients and Saputo Dairy UK. These employers are significant producers of liquid milk and dairy products such as cheese, butter, and spreads.

Developments in the Dairy Industry

Following surging milk prices last year, farmgate prices, which are paid to farmers, experienced a turbulent 2023. The global oversupply of dairy and a drop in demand, driven by the cost of living crisis, led to a sharp decrease in farmgate prices in early 2023, causing them to drop below production costs. This led to concerns around the long-term viability of smaller dairy farms, which cannot compete on price, particularly given rising input costs in the form of feed prices and energy bills.

Further up the supply chain, dairy companies also faced inflationary pressures, as well as changes to consumer behaviours, such as the movement towards discount channels and own brand products. Demand for certain categories of dairy product, such as organic ranges, were more affected by consumers changing their buying habits.

The combination of rising milk production and a drop in the demand for dairy led to milk being one of the first types of food to start to show signs of deflation in the UK, with prices declining as the year progressed. Short supply chains meant that lower energy and commodity costs could be passed on more quickly to shoppers than for products made with multiple ingredients or requiring manufacturing.

Pay and Conditions

- **Arla Foods (Logistics, Cheese, and MY bargaining groups)** – Effective from 1 April 2023, a 7.5% increase on all pay rates and allowances. The company also agreed to finalise the digital agreement, including aligned security of employment terms and conditions across all negotiated groups by the anniversary date of the annual pay increase.
- **Müller Milk and Ingredients (MMI & MMID)** – Effective from 1 April 2023, a 7.5% pay increase to the hourly base, hourly consolidated and annual consolidated rates. This flows through into any premiums based on these rates, such as overtime.
- **Müller Milk & More** – Effective from 1 April 2023, a 5.1% increase to all basic rates of pay. In addition, a £250 lump sum payment, payable to all colleagues covered by the bargaining unit employed on 1 December 2023.
- **Saputo Dairy UK** – Effective from 1 April 2023, a 7.7% increase across all basic rates of pay and associated payments.



Food Manufacturing

Usdaw's Presence

Usdaw's membership in the sector stood at over 10,500 at the end of the year.

Usdaw reps and members in food manufacturing have continued to work in difficult circumstances at sites as the economic challenges caused by sharply rising inflation impacted demand across the sector.

Developments in Food Manufacturing

2 Sisters

Usdaw currently has agreements in five 2 Sisters sites, with all sites undertaking local pay negotiations. The Union is trying to re-establish the twice yearly National Joint Consultative Committee meetings to be held in 2024.

Kellogg's

The Union continues to play an active part in the Kellogg's European Works Forum and the Chair of the Forum is an Usdaw rep.

The Union worked in conjunction with Kellogg's to introduce an industry-leading domestic violence policy, that covers all of Europe, with anyone suffering from the impact of domestic abuse being entitled to an additional 10 days' paid leave, as well as financial help for an initial legal support meeting.

The business will also provide a one-off payment for expenses and costs incurred for setting up a new bank account, or any other activity that provides members suffering domestic abuse with financial security.

The European Select Committee have continued to meet on a fortnightly basis to ensure all parts of the forum are engaged with the ongoing changes within Kellogg's.

Pladis

Of the seven Pladis sites in the UK, Usdaw has recognition at two and holds quarterly joint consultation meetings with the company. The Pladis European Works Council continued to hold in-person meetings attended by all delegates from the UK and Europe.

The Union was pleased to have been able to negotiate a 7% pay increase on all pay rates and allowances, plus a £350 one-off cost of living payment in December 2023.

Usdaw also worked closely with the company in developing and introducing menopause guidance and a UK domestic abuse policy.



Home Shopping

Usdaw's Presence

The way people shop and interact with retailers is increasingly online, with the proportion of online sales growing from 10.6% in 2012 to 26.5% in 2022.

Online market share has increased by approximately 1% (of total retail sales) each year until 2020, a rate of change that increased during the pandemic and then fell back in the immediate aftermath of Covid restrictions. However, the trajectory of 1% of market share per year now appears to have resumed, with a steady increase in 2023.

Usdaw has a large presence in the traditional 'mail order' Home Shopping Sector, however the sector itself continues to see significant change as the traditional key players are bought out and business models transformed. The Union continues to hold its presence in the sector, as well as growing its membership at employers such as Boohoo and QVC who currently do not recognise the Union.

Developments in Home Shopping

Boohoo

Usdaw has maintained its campaigning presence in relation to Boohoo. Usdaw once again pushed Boohoo for Union recognition following revelations in 2023 that the company had been found to be breaking promises previously made to produce its clothes fairly and allegedly pressured suppliers to drive prices down. Usdaw urged Boohoo to not only clean up their supply chain, but also to engage with the Union to help repair their reputation and ensure their own staff are treated with fairness and respect.

N Brown Distribution

In August 2023, N Brown Distribution entered into consultation with Usdaw around the closure of their Hadfield site. The proposed closure is due to take place after March 2024. The company intend to move operations nearer to Shaw or Heywood. Usdaw is in discussions around redeployment opportunities to either Shaw or Heywood, however, we have also negotiated an enhanced redundancy package for those who leave.

The Very Group

At The Very Group's flagship Skygate Distribution Centre in the East Midlands, Usdaw ran several successful recruitment campaigns and hosted tours for senior Union representatives. Plans are in place to run a recruitment campaign in 2024 focusing on increasing rep numbers and membership density at the site.

Discussions are also taking place with the company regarding a recruitment and awareness campaign at the Skyways Head Office in Speke, with a view to increasing both Union membership and the number of Usdaw reps on site.



QVC

QVC is a home shopping employer with several thousand staff based at their head office in Kirby. In 2023, it became apparent that the company were insisting that Union representations were held via video conference, when non-union members were being supported physically by an in-house colleague. Usdaw successfully challenged this, and the business is now allowing our Union members to be physically represented within their workplace. A significant number of new members have joined Usdaw at QVC this year. Through the help and support of members on site, we have engaged and recruited lay activists to boost the membership, which has proved successful.

Studio Retail

There have been significant operational changes at Studio Retail in 2023. The total headcount of staff has reduced from 1,700 to 1,000, equating to a 40% loss of job roles across the company. This has been a challenging time for members across all locations and Usdaw has managed to secure an enhanced redundancy package for all members affected. The Union continues to hold robust and meaningful negotiations to ensure that the terms and conditions of remaining staff are protected.

Pay and Conditions

- **GXO Logistics Inc, Raven Mill, Oldham (previously Shop Direct)** – Usdaw members at GXO Logistics, Raven Mill, accepted a 7.3% increase on basic rates of pay, effective from May 2023.
- **N Brown (JD Williams) Head Office** – The anniversary date for pay negotiations was 1 April 2023. Following positive negotiations an agreement was reached on an offer of a 9.5% increase in pay, along with enhancements for new starters to access company sick pay sooner. This was agreed in a ballot of the membership.

- **N Brown Logistics (JD Williams)** – The anniversary date for pay was April 2023. Following positive and constructive negotiations an agreement was reached and accepted for:

- An increase of 13.15% on pay from £9.90 to £11.20 per hour.
- An increase of 10.30% on enhanced night shift supplement.
- An increase of between 5% and 12% for Transport.

- **Studio Retail, Accrington and Failsworth** – In April 2023, Usdaw members accepted, by ballot, an offer of 7.3% on all rates of pay, bringing the base rate up to £10.60 per hour.

- **The Very Group (formerly Shop Direct) Financial Services (Bolton and Speke) and Skyways Head Office (Speke)** – Usdaw and Sata agreed a new market based pay approach which is a much fairer, consistent and transparent way of rewarding pay. This approach is aimed to progress those paid below their market median and narrow the gap with those that are paid above the market. We have seen a huge amount of our members receive significant increases in pay and closing the gap with this approach.

Our members were balloted and agreed the market base approach was the way forward. The company will still enter into discussions around this so that we can continue to support our members with their pay.

- **The Very Group, Skygate Distribution Hub** – A two stage increase in pay of 75p per hour was agreed, made up of a 50p increase in October 2022 and a further 25p from April 2023. In addition, a one-off cash payment was agreed for colleagues who earn less than £40,000 (FTE) per year, paid in April 2023:
 - £750 for colleagues paid up to £35,000 per year.
 - £500 for colleagues paid over £35,000 up to £40,000.



Retail Food

Usdaw's Presence

Retail Food remains Usdaw's largest sector. Throughout the year, the sector continued to deal with the challenges of food inflation, energy costs and subsequent supply chain difficulties. The sector was heavily impacted by the sharp increase in inflation, caused by a disastrous mini-budget announced in 2022 under the very brief Liz Truss premiership. Our members in food retail continued to work hard in difficult conditions to keep the UK fed.

By the end of the year:

- Tesco membership stood at 129,460. This figure covers all parts of the business.
- Total Morrisons' membership stood at 31,212.
- Membership in Sainsbury's was 23,033.

Developments in Retail Food

Tesco

- **Business Performance** – Tesco released interim results on 4 October 2023, reporting very strong trading results, gaining market share in-store and online, and increasing the projected full year adjusted operating profit from £2.5 billion to between £2.6-2.7 billion. UK like-for-like sales were up 8.7%, with statutory revenue at £34.1 billion, up 5% at actual rates, and UK & ROI adjusted operating profit was £1,371 million, up 17.2%. Five of the 'big six' measures across both the Tesco Group as a whole and the UK operation were green, showing that the business is on track against its own set targets of Grow Sales, Deliver Profit, Improve Operating Cash Flow, Customers Recommend and Colleagues Recommend. Climate was grey, which is on target.
- **Store Management Restructure** – At the start of 2023, Tesco announced a number of changes in stores, the most significant of which was management restructure, which placed over 2,000 Lead and Team Managers at risk of redundancy. As part of the restructure, the business planned to introduce around 1,800 new Shift Leader roles to stores. The Union entered into collective consultation with Tesco over the proposed changes. The collective consultation process resulted in several improvements in the options available to impacted members, including, for the first time in stores, the commitment to consider individual preference in the selection process, better redundancy pay calculation, option of a lump sum buy-out, a clear redeployment process with commitments to vacancies of meaningful hours and an extended trial period.

- **Head Office Restructures** – The business undertook a further restructure, impacting staff at head office as part of the ongoing review of its head office functions and placing hundreds of staff at risk of redundancy. The Union entered into collective consultation with Tesco over the proposed changes and was able to secure a number of improvements to the terms originally proposed by the business.
- **Union Learning Rep Elections** – Elections took place in Scotland, Wales and Northern Ireland in October for Usdaw's Union Learning Reps (ULRs) in stores. Due to the removal of Government funding in England, a full election process did not take place.

Sainsbury's

At the time of writing, the company's first half of the financial year results, covering March to mid-September, showed retail operating profit up 2% to £485 million. Statutory profit before tax was down 27% to £275 million, however, underlying profit before tax remained flat year-on-year at £340 million. Grocery sales were up 10%, with CEO Simon Roberts thanking staff for their "fantastic efforts, delivering brilliant value."

The Union's relationship with Sainsbury's continues to progress, with a new partnership agreement signed in July. A list of key improvements can be found below:

- Sainsbury's to encourage all new and existing colleagues to join Usdaw.
- New starter inductions – in the spirit of partnership, Store Managers now ensure reps are made aware of new starter inductions taking place each week. The Union is also invited to attend any new store inductions.
- Three Usdaw Recruitment Weeks per year – this includes the official Usdaw Membership Weeks in January and June, and a third Membership Week in either September or October.
- Usdaw reps and officials can recruit colleagues at any time of the year. We are pleased to advise that recruitment can now take place on the shopfloor. This had been a major issue for a number of years, however, the agreement now allows for this.
- The National Consultative Committee (NCC) now meets three times per year, however, also meets for longer and in person where possible.
- Zonal Meetings are now to be held twice a year, with a pre-meeting held four weeks before. One Usdaw rep from each Usdaw recognised store on the Zone attends the pre-meeting.
- A new Annual Pay Consideration meeting was introduced, taking place in September. Usdaw and National reps met with the company to put forward proposals for consideration ahead of the Annual Pay Review.

- Facilities for Area Organisers to hold a monthly rep team meeting in individual stores or with a group of up to five local stores. Store Managers will also hold a meeting with their store reps once each period.
- The agreement now provides much more clarity on which events Sainsbury's will authorise paid release for members.
- Store Managers also support officials to identify new reps in newly allocated and existing Usdaw stores.
- Rep elections take place every three years, with these first being held in October 2023.

The company have listened to the NCC and responded to the Union's calls, including further supporting members with the cost of living by continuing to provide free food in the canteen. During the summer, the company also trialled an increased staff discount at 15% every Saturday and Sunday, the most popular shopping days for colleagues.

Morrisons

The company had another difficult year, they remain the fifth largest supermarket in the UK after being knocked out of the fourth position by Aldi last year. Inflation and interest rates are still causing problems for the company as a result of significant debt levels. The company showed some improvements with a sales growth of 1% in Q2 and a further 2.9% growth in Q3, this upward trend is a welcome change from shrinking sales in 2022. Morrisons supported and participated in Usdaw's Respect Week campaign and reissued joint statements and materials in stores.

Pay and Conditions

- **Tesco** – Following pay negotiations in January, an increase of 7% was agreed and endorsed by the full National Forum. It was also agreed that implementation would be brought forward to April, which is now the new anniversary date. This will have the permanent benefit of meaning future pay increases are paid earlier in the year. The increase took hourly rates from £10.30 to £11.02, which brought the Tesco hourly rate up to the top of the big food retailers.

Taking into account the earlier anniversary date, and the unprecedented interim increase secured in November, our members in Tesco retail received an increase of over 15% in nine months. Over the same time period, inflation was running at an average of 12.9% (RPI), 10.25% (CPI).

The Union was also able to secure a significant increase in the Shift Leader skills payment and improvements to London location pay. The settlement meant that, for the first time, Tesco was paying the real Living Wage rate throughout the country, including in London.

- **Sainsbury's** – The Union does not have collective bargaining rights for Sainsbury's members however, Usdaw does submit a pay claim for the company's consideration. Following strong representations made by the NCC, Sainsbury's proposed a new basic rate of £11 per hour for national stores. In London stores, the new basic rate increased to £11.95. This meant that over a 12 month period, the basic rate significantly increased for our members from £9.50 to £11 an hour (equating to a 15.8% pay rise since March 2022). The Responsible Colleague payment also increased from 80p to 90p (a 12% increase) and a commitment to continue with the Argos 15% discount on pay days.

- **Morrisons** – The 2023 pay negotiations were very difficult with the backdrop of the cost of living crisis, as well as the company's precarious financial position.

In April, the basic rate increased in line with the National Living Wage increase, with the company agreeing to maintain the 22p skills payment differential.

In May, the NNC met with the company and after difficult negotiations, Morrisons offered an increase of 72p (including the increase in April) taking the base rate, to £10.92, the introduction of three waiting days on company sick pay, and to bring the anniversary forward to April 2024. The national ballot was carried out and the deal was accepted, with 60% voting in favour of the offer. These changes were implemented in October 2023 and arrangements were made for the next pay review in April 2024.



Retail Non-Food

Usdaw's Presence

Membership in the sector stood at over 40,000 at the end of the year, making Retail Non-Food the Union's second largest sector.

The Union is committed to making progress in extending the remit and scope of existing agreements and strengthening relationships with companies across the Retail Non-Food Sector. Usdaw continues to put pressure on other companies to engage with us.

This has been another challenging year for our members in the sector, with rising prices and the overall decline in purchasing power impacting on growth and demand within the sector. This, in the main, has been caused by ongoing economic difficulties and Tory mishandling of the economy.

Developments in Retail Non-Food

Sainsbury's Argos

Progress in the Union's relationship with Sainsbury's Argos continues. Usdaw is supporting and representing members as the company continues to move to a more integrated business model.

Within the Argos arm of the business, the National Joint Consultative Committee (JCC) meet regularly with the company to raise issues on behalf of members. Following representations, we have seen the company listen to feedback and respond to a number of the Union's calls, including increasing staff discount to 15% every Friday after pay day.

Following the 2023 pay review, the basic rate of pay rose by 7.3% to £11 per hour for retail colleagues, surpassing the real Living Wage. In London, basic pay rose to £11.95.

This increase came about as a result of strong representations made by Usdaw for the company to look at ways to support members under continued pressure from huge rises to the cost of living. The increase marks a total rise of 15.8% on basic rates since March 2022.

National JCC meetings took place regularly between the company and representatives for Argos Financial Services and Argos Contact Centres, providing a platform for members' concerns to be addressed. The JCC structure for fulfilment centres continues to prove productive and Regional Fulfilment Centres are now also represented at the National Argos JCC.

The Argos Joint Consultative Forum was also set up, with a representative from each Local Fulfilment Centre (LFC) meeting three times a year at national level to address concerns specific to the LFC population.

B&M Bargains

The Union's presence and influence within B&M Bargains has continued to grow this year. New reps are welcomed and encouraged to help form a national network. The Retail JCC continues to meet to help raise issues from the membership.

Annual local pay negotiations commenced for warehouse colleagues at Bedford and as a result of this year's pay talks, a 20 month deal was agreed for the basic rates, with a 15.7% increase agreed from August 2023 and a further 4% from April 2024. This deal was accepted by the membership at ballot.

At the Speke and Middlewich sites, pay talks secured a 23.08% increase across a one year deal. This deal was accepted by the membership at ballot.

Ikea

With support from the company, Usdaw continues to build a network of reps in Ikea to raise the Union's profile and membership.

Nationally, the Union continues to keep in close contact with senior management from the company. These discussions have covered restructuring parts of the business and the cost of living crisis.

The Union welcomed Ikea's commitment to continue as a real Living Wage employer, ensuring staff pay will increase over two stages:

- The first increase is to be applied from 1 January 2024, taking hourly rates of pay to £11.45 for Provincial, £12 for Outer London and £12.55 for London.
- The second increase is to be applied from 1 May 2024, taking the hourly rates of pay to £12 for Provincial, £12.60 for Outer London and £13.15 for London.



Marks & Spencer

Usdaw continues to support reps and members in workplaces, with Union-side meetings remaining as an opportunity to link with members to discuss updates and key issues.

Poundland

The Union's relationship with Poundland progresses through regular Joint Negotiating Committee and Joint Consultative Committee meetings. National representatives play a key role, raising issues on behalf of members and working to strengthen the agreement between the Union and the company.

The Poundland Sata agreement provides for twice yearly JCC meetings. Work to identify reps to support the structure has been delayed and it is hoped meetings will commence in 2024.

The Union has recognition at three Poundland Distribution sites and holds quarterly National JCC meetings between senior reps and management.

Primark

The Union continues its working relationship with Primark, both in Britain and Northern Ireland.

The Union continues to play an active role in the recruitment of new members and inductions. The Union will revisit discussions to set up a National JCC meeting next year.

Pay and Conditions

- **Argos Contact Centres** – Members received a pay increase of 90p per hour, with the new headline base rate of £11.
- **Argos Financial Services** – Members received a pay increase of 93p per hour, with the new headline base rate of £11.23.
- **Argos Retail & Regional Fulfilment Centres** – In February, members received a pay increase of 75p per hour, with the new headline base rate of £110 effective from 5 February 2023. For London sites, the rate increased to £11.95. The increase marks a total rise of 15.7% on basic rates since March 2022.
- **Poundland** – Basic rates of pay rose by up to 9.42%, with continued investment in the supervisor population by maintaining the existing pay differential of 50p per hour higher than the over 21 pay rate.



Road Transport and Distribution

Usdaw's Presence

Usdaw remains one of the largest trade unions in the sector with over 20,000 members.

Developments in Road Transport and Distribution

Companies operating in the sector were not immune to the challenges facing the wider economy in 2023, with both high inflation and a tight labour market creating a difficult trading environment.

Changes to consumer behaviour, both due to rising prices and the normalisation of buying patterns following the pandemic, exerted a downward pressure on sales volumes, particularly within e-commerce.

The primary focus of pay negotiations across the sector was achieving the biggest possible increase to base rates in order to alleviate the impacts of a historic cost of living crisis on members.

Pay and Conditions

- **AF Blakemore** – Effective from 2 April 2023, an increase of 77p added to all rates of pay (excluding Bedford warehouse rates, which increased by 1% following the increase to warehouse rates applied within the previous six months). An increase of 7.4% added to all warehouse additional elements of pay, and an increase of 4.5% added to all transport additional elements of pay.



● Evri

Depots – Effective from 1 May 2023, a new pay structure was introduced based on National, Outer London and Inner London core rates, with associated hotspots for each core area. The new structure:

- Increased the Day Loader basic pay to £10.74 per hour nationally, £10.92 in Outer London, and £11.62 in Inner London.
- Ensured a 10% difference between Days and Nights Loader rates.
- Aligned the differentials between drivers on days and nights for national roles to 10%. In London, this ranges from 5.4% to 12.1%.
- Consolidated Geo's, where applicable, into the basic rate.
- Provided a one-off payment to 248 colleagues in recognition of circumstances where the new basic rate is lower than the combination of both the 2022 rate and Geo.
- 2005/11 contracts received a smaller basic pay increase and received an interim Geo, either matching their current level of pay or increasing to match the core pay rates, whichever is highest.
- Introduced new job codes and rates for 2005/11 Cat C Days and Cat C Nights to allow pay and job titles to reflect typical working patterns.
- P Grade rates moved in line with the deal, with a P4 rate moving to £10.74 per hour.

Hubs – Effective from 1 April 2023, an average increase of 55p over the April 2022 rates was agreed to maintain differentials between shifts, and to start to bring Warrington pay rates in line with Rugby and Barnsley. An additional uplift pay rate at peak of £1 per hour for hours worked during the three peak weeks.

- **GXO Logistics (Asda)** – Effective from 1 April 2023, a range of increases dependent on site from 6.13% to 10.19%. In addition, holiday pay to be processed as average pay for all 264 holiday hours taken from 1 January 2023 (replacing average pay for the first 168 hours and the remaining hours at basic pay).
- **GXO Logistics (Sainsbury's)** – Effective from 1 July 2023, an 8% or 8.45% increase to basic pay, dependent on site. In addition, all colleagues who currently hold an FLT licence, and use it, to be paid a lump sum of £200 per annum, which will always be calculated and paid pro rata (eligibility criteria to be met).
- **GXO Logistics (Tesco)** – Effective from 1 March 2023, a 7.5% increase to basic pay and all elements which make up normal pay, including any shift allowances, night premiums, overtime and weekend premiums, and bank holidays.
- **Martin Brower** – Effective from 1 January 2023, an 8.15% increase to all basic rates and all elements that make up normal pay. The pay offer was made on the basis that the third and final loyalty payment originally due to be paid in July 2023 will now not be paid, with the monetary equivalent being incorporated into the 8.15%. The next pay review will be effective from 31 March 2024.
- **Next Distribution (SATA)** – Effective 1 August 2023, a £1 per hour increase was applied to all job roles. In addition, for Team Managers (TM), a recognition payment of £16 per shift for any TM who needs to perform manager in charge duties, which is based on the differential between an Assistant Site Manager and competent TM pay rate.



- **Next Distribution (Usdaw)** – Effective from 1 March 2023, a £1 per hour increase applied to all job roles to maintain differentials of pay in cash terms (rather than in % terms) across all job roles (exceptions were 16 and 17 year olds who receive 70% and 80% of the 18 year old adult rate).

A 12 month deal was agreed where the pay rate increased on 1 March 2023, and a lump sum payment of £100 for full-time employees and £50 for part-time employees was paid for one month due to the insufficient time to conclude the ballot prior to the pay run in February 2023.

The following allowances also increased by £1 for full-time rates:

- **First Aid Allowance** – £24.50 (full-time rate), £12.25 (part-time rate) per month.
- **Forklift Occasional Allowance** – £39.80 (full-time rate), £19.90 (part-time rate) per month.

- **Ocado** – The Union has full recognition in all Customer Fulfilment Centre (CFC) sites, as well as all LGV and Service Delivery, Spoke and Zoom sites. Pay negotiations for the CFC sites were undertaken collectively, at a national level once again, in the Andover, Erith and Purfleet regions. Dordon was conducted regionally.

Effective from 21 March 2023, Customer Service Team Members received an uplift of 5.4-5.5% per hour on basic rates with Ocado reinvesting 10p from the evening premium in all basic hourly rates. Increases ranging from 2p to 4p were also applied to premiums for Marshals, Night Marshals and Chargehands.

In April 2023, all hourly paid LGV colleagues received a 4% increase on all hourly base rates, whilst a working group was also set up to review and agree the driver's schedules to have a clearer understanding of payments.

- **Sainsbury's Distribution** – Within the Sainsbury's Distribution network, the Union has recognition at three sites supplying Sainsbury's food stores:
 - **Haydock** – Effective from 1 April 2023, a 12% increase to the basic hourly rate, with the minimum standard being moved from 75% combined performance over a four weekly period to 82%. End of shift wash-up time was reduced from 10 minutes to five minutes per shift, and a new attendance policy was introduced.
 - **Rye Park** – Effective from 5 March 2023, a 9% increase and the removal of five minute wash-up time.
 - **Waltham Point** – Effective from 5 March 2023, a 10% increase.

● **Tesco Distribution**

Salmon Book – Effective from 1 July 2023, a 7.5% increase to all hourly rates of pay and premiums, in addition:

- A one-off payment of £500 to all colleagues.
- An increase in the maintenance standby payment to £150 on the following dates: Easter Sunday, Christmas Eve, Christmas Day (an additional £100 payable for this day remains, making the payment £250), Boxing Day, New Year's Eve, and New Year's Day.
- A working party to discuss the opportunity for colleagues to request a buy-out of their reserve hours.
- Driver's Meal Allowance on the 2022 contract to increase to £5.76 per week.

Five Book – Effective from 23 June 2023, a £1.01 increase to all hourly rates of pay and premiums for all contracts, in addition:

- A one-off payment of £500 to all colleagues.
- An increase in the maintenance standby payment to £150 on the following dates: Easter Sunday, Christmas Eve, Christmas Day (an additional £100 payable for this day remains, making the payment £250), Boxing Day, New Year's Eve, and New Year's Day.
- A working party to be established with the Maintenance Leadership Teams to discuss and review the call-out payment.

New Book – Effective from 1 July 2023, a 7.5% increase to all hourly rates of pay and premiums, in addition:

- A one-off payment of £500 to all colleagues.
- One additional personal day for all colleagues in Middlesbrough.
- An increase in the maintenance standby payment to £150 on the following dates: Easter Sunday, Christmas Eve, Christmas Day (an additional £100 payable for this day remains, making the payment £250), Boxing Day, New Year's Eve, and New Year's Day.
- A working party with the Maintenance Leadership Team to be established, to review the call-out payment.

- **Yodel** – Effective from 1 July 2023, an average pay increase of 6.75% across all roles.



Departmental Reports

General Note

This section of the Annual Report provides information about the work of the following Head Office departments:

- Administrative Services.
- Education and Training.
- ICT.
- Legal Services.
- Management Services.
- Media and Communications.
- Research and Policy.

Administrative Services

Annual Delegate Meeting

The department was involved in organising the Annual Delegate Meeting (ADM), including preparing conference documentation, compiling, proofreading, producing and issuing the Preliminary and Interim Agenda Papers, along with the Annual Report, and proofreading and producing the three National Executive Council Statements that were presented to conference. The department also prepared and issued credentials for delegates, visitors and officials, arranged the End of Conference social event and dealt with enquiries about conference arrangements.

The department liaised with the office of the Mayor of Blackpool, the local Trades Union Council, the Winter Gardens staff, the local authority and several other external bodies in respect of conference arrangements. During conference itself, the department provided administrative support for compositing meetings and assisted the Standing Orders Committee (SOC) in preparing the Final Agenda Paper. The department also provided technical, clerical and administrative support to the SOC throughout conference. In addition, general assistance was provided to delegates and visitors through the General Office and information on speakers and debates managed via the visual display system.

Conference was attended by 476 delegates from 264 branches, representing 83% of the total industrial and political membership. Conference was also attended by the National Executive Councillors and Regional Councillors, 114 officials and over 270 visitors.

Branch By-Laws and Standing Orders

The department examined and advised upon draft by-laws and standing orders from branches to ensure that they do not conflict with the general Rules of the Union. The drafts were prepared for consideration and approval of the National Executive Council. In addition, the department provided advice and assistance to officials on branch matters as required.

Conferences

The department provided administrative assistance in connection with the registration of delegates, payment of expenses, submission of motions, nominations for elections and prior meeting arrangements in connection with Union representation at TUC and Labour Party Conferences at both national and regional level.

Data Protection

In conjunction with the Union's Data Protection Officer, the department assisted staff, reps and members with general data protection queries. Current practices and processes are continually reviewed for compliance with data protection.

Diary

The department worked with our supplier to prepare, proofread and produce the diary. This involved collating information on the Union's regional and branch offices, the Usdaw Parliamentary Group and on the services provided by Head Office departments. It also contained guidance on running branch meetings and on the ADM, together with general information and UK maps. 12,500 copies of the diary were printed.

Elections and Ballots

The department was responsible for all administrative work associated with the conduct of the Union Elections for Regional Councils, Standing Orders Committee and representatives to congresses and conferences. The department also administered the President and National Executive Council Elections to close of nominations, at which point responsibility for the issue of Voting Papers transferred to the independent Scrutineer and Returning Officer, Civica Election Services.

The department was also responsible for all administrative work associated with two Regional Council By-Elections in the Scottish and North West Regions.

In addition, the department was responsible for overseeing the counting of numerous postal ballots and a scrutineered ballot connected with pay and terms and conditions at work.



Grant-in-Aid for Federations

No grant-in-aid applications were made. At the year-end, 12 federations were in operation.

Long Service Awards

The department issued a total of 401 awards to members who had attained 30 and 50 years' membership of the Union. This involved identifying the recipients, notifying their local officials, and producing and issuing the awards.

Property and Insurance

The department assisted the Executive & Administration Officer on a variety of property matters, including fixed and moveable assets, and liaised with the Union's property managing agents in respect of maintenance and refurbishment matters.

In addition, the department authorised payment of rents, rates and general services for Union property.

HR Matters

During the year the section provided support, advice, and guidance on a wide variety of HR issues, including the continued development of the HR database, health and safety matters, recruitment and selection of staff, disciplinary issues, performance management, and supporting managers in applying the Sickness Absence Procedures.

Covid-19 Support

During the year the section provided updates on the closure of the Government's isolation note service, produced guidance on how long staff should self-isolate for, and publicised the autumn Covid vaccination booster programme for those staff who were eligible.

Health and Safety

The section was involved in making the arrangements for the bi-annual Health and Safety Committee meeting, for which it produced statistical, technical, and other information and compiled the minutes and action points.

The section contributed to the content of a new Health and Safety Rep training course.

Guidance was issued on sedentary work and staff wellbeing, including the publicising of the Union's Employee Assistance Programme. The section also provided a reminder on the procedure to follow when reporting accidents and near misses.

The section provided guidance and support on 18 in-house risk assessments including DSE, stress and pregnancy.

Occupational Health

The section has prepared and submitted 24 medical referrals for members of staff.

SelectHR

The major work on SelectHR has revolved around:

- A major project to scope all HR system functionality and prepare to undergo a tendering process for a potential replacement system.
- An ongoing process of cleaning the data in preparation for importing into new formats.

Staff Handbook

During the year changes were made to the following sections:

- Car Scheme.
- Eye Tests.
- Probationary Periods.
- Retirement.
- Sickness Absence Procedures.
- Superannuation Scheme (now called Staff Pensions).

Training

The section delivered classroom training on the following courses:

- Introduction to Management.
- Grievance and Disciplinary.
- Managing Sickness Absence.
- Recruitment and Selection.

Training on how to use the Union's HR database, SelectHR, was provided to new managers and new members of staff throughout the year.

E-learning content was launched for managers on the following topics:

- Managing Mental Health.
- Recruitment and Selection.

In addition, E-learning on managing Health and Safety was also provided to new managers in the Union.

E-learning Refresher Training on HR Policies and Procedures was produced for managers, which will be launched in 2024.

Education and Training

During the year the department provided a varied education service to all members and staff. The department continued to develop and offer training online and produced a number of courses for both reps and members throughout the year.

Courses for Union Reps

The provision of three to five days' training for Shop Stewards and Safety Reps continued to be the most significant part of the service provided during the year. A total of 399 courses were held and these were attended by 4,175 reps. This provision was made up of 268 Shop Stewards courses, of which 98 were introductory, 170 were advanced; 131 Health and Safety Courses, of which 49 were introductory, 82 were advanced. The details are as follows:

Sector		Gender		Ethnic Origin		Hours of Work	
Retail	Non-Retail	Men	Women	White	Black/ Ethnic Minority	Full-Time	Part-Time*
2,751	1,424	2,577	1,598	3,628	547	2,745	1,430

* Defined as working less than 34 hours.

Branch Officer Training

Six residential courses for newly appointed Branch Officers were held at Head Office and these were attended by 106 officers. The details are as follows:

Sector		Gender		Ethnic Origin		Hours of Work	
Retail	Non-Retail	Men	Women	White	Black/ Ethnic Minority	Full-Time	Part-Time*
72	34	56	50	95	11	70	36

* Defined as working less than 34 hours.



Online Training

The department offered a significant number of online bite-size courses for our members.

Some of these courses were aimed at new reps who had not yet completed their training. The table below shows the number of reps who completed each course this year:

Course Title	Number of Reps
The Role of the Rep	375
Organising and Recruitment Part 1	325
Organising and Recruitment Part 2	286
Representing Members Part 1	221
Representing Members Part 2	200
Health and Safety Reps Handbook Part 1	180
Health and Safety Reps Handbook Part 2	137
Health and Safety Reps Handbook Part 3	131

Other online courses available included Mental Health, Data Protection and The Equality Act.

Overall, over 4,000 reps and members engaged in our online courses this year.

Residential Summer Schools

The First Series and Second Series Summer Schools were held at Hillscourt, Birmingham. The First Series sought to develop awareness of trade union issues and was attended by 38 members. The Second Series had a common theme of developing organising in the workplace. Within the school, there were four separate strands concerning Trade Unions, Health and Safety, Politics and Women. This school was attended by a total of 41 members. The details are as follows:

	Sector		Gender		Ethnic Origin		Hours of Work	
	Retail	Non-Retail	Men	Women	White	Black/ Ethnic Minority	Full-Time	Part-Time*
First Series	33	5	20	18	34	4	27	11

* Defined as working less than 34 hours.

	Sector		Gender		Ethnic Origin		Hours of Work	
	Retail	Non-Retail	Men	Women	White	Black/ Ethnic Minority	Full-Time	Part-Time*
Second Series	35	6	24	17	37	4	28	13

* Defined as working less than 34 hours.

The Usdaw Academy

The Usdaw Academy Programme ran successfully for another year with Academy1 training provided within the regions and Academy2 training delivered nationally.

Academy1 provides activists with a six months development programme involving 12 days' classroom training, with the rest of the time in the field putting into practice what has been learnt, supported by a coach. Academy2 involves 20 days' classroom training. This year's 51 Recruitment Officers completed the Academy1 programme. As well as the development they underwent, the Recruitment Officers recruited over 12,000 new members, in addition to identifying new activists and new Shop Stewards. Likewise, 25 Organising Officers completed Academy2 who recruited almost 6,000 new members, whilst also identifying additional new activists and new Shop Stewards. These additional 18,000 members equate to around 20% of all new members joined in 2023.

Federation Educational Activities

During the year, seven Federation Schools were held and attended by over 150 members. Topics covered included the Cost of Living Crisis, Pensions, Disability Discrimination, Equalities and Mental Health.

The Usdaw Home Study

A total of 702 members completed various units of the Home Study course - Unity is Strength, Democracy in Usdaw, Collective Bargaining, Understanding Pensions and Vulnerable Workers.

Staff Training

Staff training covered topics such as Collective Bargaining, Introduction to Management, Coaching Skills, Health and Safety, Supporting and Developing Reps, Tackling Discrimination, Managing Sickness Absence and Employment Law. In total, 77 members of staff attended training.

General

The number of members who received assistance from the Union in respect of Open University courses totalled 14 and the Union continued the practice of refunding course fees to those members who satisfactorily completed courses with the Workers Educational Association.

Lifelong Learning

Following the Government's decision in 2021 to withdraw financial support for the Union Learning Fund in England, we continue to receive lifelong learning funding for Scotland (SULF), Wales (WULF) and Northern Ireland (NIULF).

During the year over 800 members in Scotland, Wales and Northern Ireland returned to some form of learning, of these:

- More than 320 commenced a Functional Skills course.
- More than 60 commenced ESOL courses.
- More than 100 commenced IT courses at various levels.
- More than 12 accessed Apprenticeships and National Vocational Qualifications at Levels 2 and 3.

The department continued to deliver learning for Usdaw members throughout the year via the Usdaw Learning Gateway. Several bite-size courses are offered covering topics including Maths, English, ICT and Mental Health. Along with this, the department has worked in partnership with numerous providers including Litmos, to provide a wide range of courses for members and reps.



The Role of the Department

The role of the department is varied, encompassing the maintenance of IT equipment, the development of new technology and the management of cyber security best practices. Additionally, the department manages the operation and strategic development of information and communication systems within Usdaw, including multiple computer programs which are a mix of third-party and those developed in-house software applications.

Digital Transformation

The digital transformation project is primarily focused on modernising outdated systems in various areas such as member service platforms, data management systems, office software and internal communication tools. The goal of this project is to enhance operational efficiency and to break down information silos, making systems easier to use for members and staff.

Microsoft 365

During the year all PCs were upgraded to Microsoft 365 and moved to a new cloud-based Exchange mail server. This shift to Microsoft 365 introduced a range of additional tools and applications, significantly boosting our collaborative and document management capabilities.

As part of the Microsoft 365 roll-out, the department piloted Microsoft Forms and additional forms software, replacing traditional PDF and Word forms. This new technology has the potential to simplify basic data entry for members and data gathering for staff, leading to improved ease of use and efficiency. Form and survey responses can now be received directly into office systems like Excel without duplication of data or effort.



Membership System – Customer Relationship Management (CRM)

The project to replace the central membership systems involved close collaboration between ICT, Records Section and Hart Square, (a digital consultancy firm) who assisted in the preliminary stages of the discovery process. The primary objective of the discovery process was to gather feedback from staff, identify challenges with the current software systems and examine data management across the Union. Hart Square conducted various workshops throughout the Union to collect this feedback and produce a report.

The report from Hart Square offered insights into widespread issues encountered by staff, highlighting common issues with the availability, accuracy, and timeliness of data. The report also made recommendations for replacement systems, highlighting the differences between some of the major platforms and associated vendors in the market.

Using the advice given and with additional research, the aim is to develop a comprehensive Request For Proposal (RFP) to obtain bids from several CRM vendors. The RFP will help in setting clear goals and objectives and will ensure enough detail is gathered and provided to build a modern membership system.

The department also continued to collaborate closely with the Records Section on a weekly basis to refine current data by eliminating duplicates and reviewing existing procedures. This effort aims to prevent the transfer of outdated practices or unnecessary legacy data into any new systems.

The AO Portal

The AO Portal is a web-based mobile application that offers Area Organisers real time information about their organising patch, including information about stores, members and reps.

In 2023, the AO Portal underwent significant development marked by the implementation of several releases. These releases included the introduction of a management portal, specifically designed for senior managers, providing improved real time oversight at a regional level. Work was also completed for the next major release due to go live at the end of January 2024. This next release will include full search capabilities at member, rep and store level.

It will also include a redesigned user interface, rep training history and an improved store details page.

In-House Expenses App

A prototype for an expense application was developed in-house using the new Microsoft Power Platform. This app was trialled by a group of officials in the North Eastern Region. Feedback is being collated from these initial users to make further improvements before rolling it out more widely. The expenses app will improve the process and reduce time spent filling out the old PDF expenses form.

Security

The ICT Support Team, in collaboration with our security partner Silvercloud, successfully migrated all its security related products to continue to protect important data from online threats. This initiative is a key component of a new 'Security as a Service' approach, which involves collaborating with external providers to prioritise security and compliance. Frequent vulnerability and penetration testing also form part of this strategy, to safeguard the Union's data.

Online Join – Hosting

The department assisted the Records Section in a project to update the Online Join area of the website. This involved the department researching and assisting with the implementation of a cloud-based solution using Umbraco and Microsoft Azure. The new Online Join area, which will go live in 2024, will improve the member joining experience and provide new opportunities to integrate with existing and new systems in Usdaw offices.

Udaw Offices

The ICT Support Team have visited the new Glasgow Office and participated in project meetings to assist with the new office refit, including the planning and installation of video conferencing, WiFi and security equipment.



Legal Services

The Role of the Legal Department

The department provides the Union, members and officials with expert advice and assistance on health and safety, pensions and legal issues.

In addition to cases taken up on behalf of individual members, the department supports full-time and lay officials on collective negotiating issues.

The department contributes to training courses, federation schools, etc and develops materials for use in electronic and print media to raise awareness of legal issues for Usdaw members.

Legal Plus

A Valuable Service for Members

Legal Plus is a key recruitment factor as it demonstrates the value of Usdaw membership and continues to deliver excellent results for members.

Members made 10,177 applications for legal assistance in 2023. This means that 1 in 35 members called upon the Union’s Legal Services for advice and assistance. The total amount of compensation recovered on behalf of members was £13,817,496.

Compensation Recovered – Personal Injury

During the year the Union won £10,604,941 compensation in personal injury claims for 1,255 members.

This includes £350,773 for 37 family members who were injured in road traffic accidents (RTAs), demonstrating that support provided to members by Legal Plus extends beyond workplace issues.

Cases Over £20,000

There were 91 accident claims where the injuries were serious enough to attract compensation of more than £20,000.

Slips and trips and RTAs account for over half of these claims.

Chart A – Accident by Type

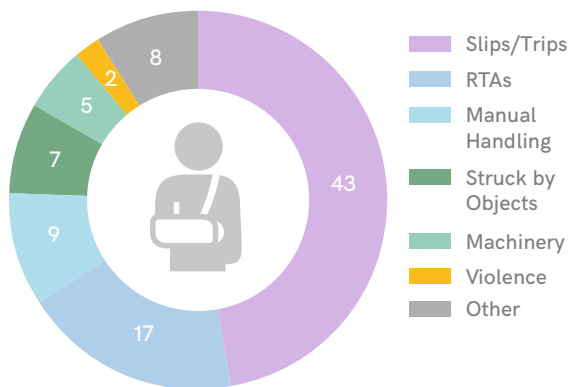
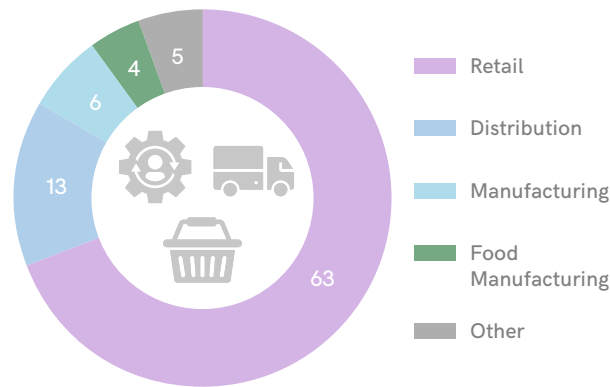


Chart B – Injuries by Sector



Analysis by sector shows that over 69% of serious injuries occur in retail.

FirstCall Usdaw

Our free accident claim line, FirstCall, continues to be a success.

Members who wish to start a claim call 0800 055 6333 to be put through to one of our expert Union solicitors. The service is available 24 hours a day, 7 days a week and calls are free from a landline and some mobile providers.

The FirstCall personal injury cover has been extended to include family that live with the member for any non-work related accidents and accidents abroad covered by the Package Travel Regulations, and this has proved to be a popular move.

Our aim is to ensure that every member who has a potential claim makes their claim through FirstCall. The number of new claims in 2023 was 3,222.

Assault At Work Grant

From 1 January 2022, Usdaw began providing an ex-gratia award to its members who sustain an injury arising from an act of violence whilst in the course of their work, or on their way to or from their place of work, subject to the qualifying conditions.

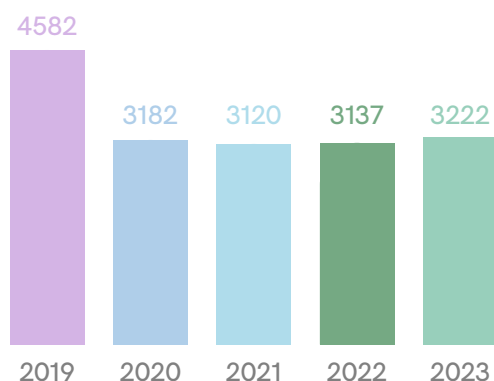
These payments are intended to provide financial support to members who sustain a crime related injury in the course of their employment. In the event that the member subsequently recovers damages from the Criminal Injuries Compensation Authority and/or a civil claim against their employer or another third party, then the amount paid to the member under this scheme will be repayable by the member to the Union.

To be eligible, the member applying for the award must register their claim through FirstCall Usdaw and their claim must meet set criteria.

The Personal Injury Section oversees all applications for the Assault at Work Grant. In the event that the decision is made to award the grant to a member, then the Union will obtain bank details from the member and will advise the member, where appropriate, of the repayable nature of the grant in the event that any subsequent claim is successful.

In 2023, 156 applications were received for an assault at work grant. 81 were closed due to poor prospects or because no further instructions were received from the member. 10 grants have been offered for a total of £4,100 and 58 applications are under review.

Chart C – Number of New Personal Injury Claims



Free Wills and Non-Work Related Advice

During the year, there were 3,363 free will applications and 2,809 applications for non-work related advice. Demand for these additional services remains high and they are popular with reps and members.

Getting the Message to Members

In 2023, reps and officials organised 32 Legal Plus days in workplaces with the assistance of the department and the Union solicitors.

Employment and Industrial Cases

755 individual employment cases were referred to the department in 2023. The amount recovered for members was £1,434,583 compared to £1,175,259 in 2022.

Chart D – Number of New Employment Claims

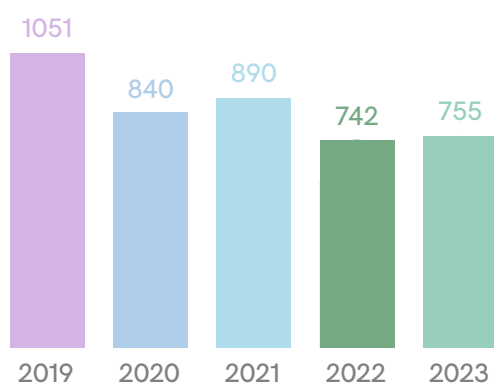
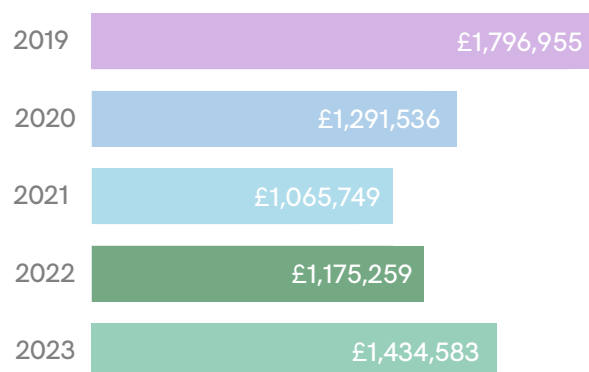


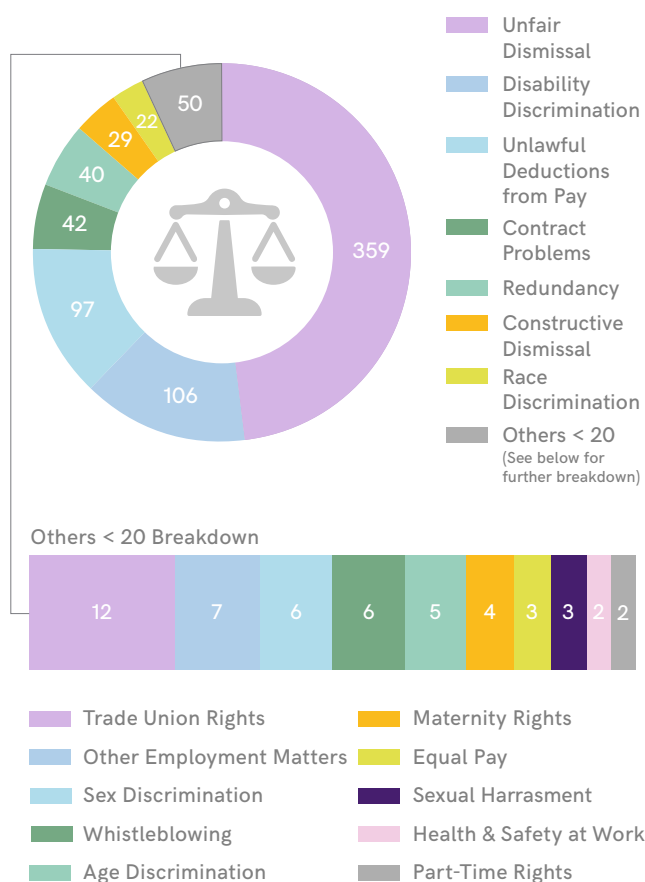
Chart E – Amount Won in Employment Claims



The Member Pack used for employment claims continues to work well. It speeds up applications for legal assistance and gives members an early decision on whether they qualify for representation. By focusing resources on the claims with reasonable prospects, the Union is able to achieve better settlements and tribunal wins for our members.

The chart below shows the breakdown of the employment claims by category. Most of these were claims for unfair dismissal, followed by disability discrimination.

Chart F – Employment Claims



The department supported and advised officials in relation to a number of collective and industrial matters.

In 2023, 123 settlement agreements were successfully negotiated by our Area Organisers and sent on to our panel solicitors for completion. The total amount recovered was £1,777,972.

Health and Safety Section

The section supports the development of policy within Usdaw and works with the TUC and with Government agencies and employers. It advises members, officers of the Union, and produces guidance on a variety of health and safety topics.

Supporting Members and Officials

The section developed a health and safety strategy to explore how the Union can support and retain our Health and Safety Reps. The section issued a questionnaire to all Health and Safety Reps, there was good engagement with a 25% response rate. The reps highlighted that they needed further support to deliver. The section introduced a range of measures to increase support for all new and existing Health and Safety Reps by providing them with an email and resource pack. The section provided additional information for all Health and Safety Reps by producing a monthly newsletter, and the Health and Safety Officer attended Health and Safety Rep courses to promote services and give advice. The section is also producing, in conjunction with the Education Department, an introductory Elucidat course designed to give new reps an understanding of where they fit into Usdaw and tools on how they can get started.

The section measured the number of members for each Health and Safety Rep, and this has reduced from 143 to 139.

The section sits on the Tesco Retail National Working Group with reps and has agreed with Tesco the roll out of a joint national quarterly inspection programme. This will involve the rep and the Store Manager following a standard inspection checklist, that the section has had input into and has been trialled by our reps. The report will be recorded on a Tesco system, with our reps being able to have a copy. It will also be fed into the Tesco central Health and Safety Section. This will embed an improved safety climate for our members as there will be a standard health and safety inspection checklist, which will promote a safety dialogue and a joint working relationship between reps and Store Managers.

The section gave advice on a wide range of health and safety topics to members and officials.

Freedom From Fear

The Health and Safety Officer represented Usdaw and spoke on Freedom From Fear at the Greater Manchester Retail Crime Strategy Group (RCSG) and the Health and Safety Executive (HSE) Preventing Violence in the Workplace working group. There was one meeting of the National Retail Crime Strategy Group (NRCSG) chaired by the Home Office Minister in 2023.

International Workers Memorial Day

The section attended the Manchester event, the theme was 'Organising Health and Safety in the Workplace', and to mark the event the section produced a leaflet and poster for reps to use in their workplaces.

Other Organising Activity

The Health and Safety Officer presented and ran workshops for delegates at the Industrial Conference.

The section represented the Union at meetings of the HSE Food and Drink Manufacturing Forum and continues to highlight to the HSE the need to maintain this tripartite structure to drive up health and safety standards in the sector.



Pensions Section

The section assists with the development of pension policy and organisation within Usdaw and provides advice and technical support to officials and members on the collective issues relating to pensions.

Advice and assistance is given to individual members and the section often takes up individual cases on behalf of members through company procedures, the Pensions Ombudsman and legal channels.

Pension Awareness Days (PADs)

These campaigns are carried out by reps in liaison with the Pensions Section and their Area Organiser.

As well as reps carrying out the traditional 'tabletop' pension awareness campaign and the noticeboard campaign displaying information about the pension scammers, many reps have continued to support the 'PAD in a Bag' Campaign.

The 'PAD in a Bag' Campaign enables Usdaw reps to approach both existing and potential new members by handing out a selection of pension guides and merchandise in environmentally friendly paper bags. This campaign, born out of necessity throughout Covid-19, is now proving particularly successful in the smaller convenience stores.

Feedback from reps has indicated that the campaign is not only a great way to continue to raise awareness of the Usdaw brand, but they can promote the free guidance service as good value for money. It has also helped as a way of recruiting new members.

As a result, 200 individual campaigns across 27 different companies were completed throughout 2023, our most successful year to date.

Pensions Website

This remains an important means of communication for the section and articles have been regularly refreshed throughout the year.

The number of hits on the Pensions landing page has more than doubled compared to last year.

This success was partly due to the section providing regular articles containing links to relevant webpages in the reps and members e-news correspondence.

Pensions Home Study

Take up has remained steady throughout the year regarding the online Pensions Home Study and completion rates remain high.

The course was promoted during Learning at Work Week in May 2023.

Throughout 2023, the section focused on the module regarding Defined Contribution Pensions, which is typically the type of pension arrangement Usdaw members will now be participating in.

National Pensions Conference

The 16th National Pensions Conference was held in Salford in June.

Guest speakers from Quilter Financial Advisers (formerly Lighthouse Financial Advice) and First Actuarial were in attendance and the Pensions Officer and Legal Adviser for Pensions also ran workshops on the day.

Company Pension Schemes

The Pensions Officer has supported officials in connection with various pension changes, consultations and TUPE transfers throughout the year.

Political

The Pensions Officer has continued to attend virtual monthly meetings facilitated by TUC and has contributed to responses to DWP pension consultations which will impact on Usdaw members.

A Bill to make provision for the extension of pensions automatic enrolment to workers from the age of 18 (previously age 22) and the removal of the lower qualifying earnings threshold, allowing pension contributions to be applied to the first pound of pay, received Royal Assent in September. Government intends to consult on when and how the new Act will now be implemented.

The main headline from the Autumn Statement in November was that Government confirmed its commitment to the 'Triple Lock Guarantee' in full next year. This will take the new single tier pension up to £221.20 a week (£11,502 a year) from April 2024.

Management Services

Warehousing

Work Measurement – Pre-Determined Motion Time Systems (PMTS)

In 2023, the department saw an increase in the number of companies that Usdaw works with moving to Pre-Determined Motion Time Systems to create their work standards.

The department has observed that companies have realised that by using these types of systems, they can spend their time and budget focusing on processes and issues that need their attention, rather than continuously retiming the same elements over again where the Standard Minute Value (SMV) rarely changes. This in turn means that they can conduct work studies in more of their warehouses during the year.

Companies have also seen benefits when a process, new equipment or things like layouts change, as there is not a requirement to retime the whole process or warehouse. Instead they can create a new sequence model and check this using traditional time study, focusing on the part of the process that has changed to generate and implement new work standards.

As companies are no longer focusing on just retiming, they are now able to refresh the driver data more regularly to reflect seasonal trends. This benefits our members, as the standards that our members are working to now reflect the product they are picking rather than what was being picked whilst the work study was being undertaken, which in some instances can be up to three years previously.

With this in mind, the department believes that the move to this method of retiming has improved the work standards for our members in the companies that are utilising it.



Autonomous Mobile Robots in Warehousing (AMR)

2023 saw the progression of AMR in one of the largest retailers that the Union works with. After a lengthy trial and proof of concept, the retailer increased the number of staff skilled in this type of picking and consequently the volume of products picked via this process.

The idea of introducing AMR is to reduce the amount of walking and heavy work the staff member is required to do during a shift, which in turn increases the pick rate and quality from the individual picker.

The reduction in some of the walking and heavy lifting which staff undertake can also reduce the risk of accidents in the workplace.

AMR robots can operate for long periods of time without the need to charge and when required will autonomously return to the charging station without the need to dedicate time and resource to basic daily maintenance.

The department feels that the reduced amount of available labour is one of the reasons that companies are looking to automate some of their warehouse operations, as it allows the company to scale-on-demand and redeploy human workers to more valuable tasks and reduces the risks surrounding a limited workforce.

Internal Projects

EV Chargers

During 2023, the department ran a project to install EV Chargers, where practical, at Usdaw offices around the country to support the introduction of electric and hybrid vehicles for officials and the increased number of reps, members and staff who are now also purchasing these vehicles.

Although the process has not been straightforward, Usdaw is now in a position where there is at least two EV Chargers installed at five of our sites around the country, with Head Office having six installed. In the first six months of 2024 the department is aiming to install EV Chargers at four more Usdaw offices.

The chargers can be used by installing an app, the QR code for this is attached to each of the EV Chargers, and once installed is easy to follow and use.

Media and Communications

Media Coverage

Shoplifting and the cost of living crisis dominated Usdaw's news agenda. The 'Freedom From Fear' Campaign received coverage throughout the year, with focus on our survey results report and Respect for Shopworkers Week. The department continued to promote new protection of workers legislation, which was backed by Labour. Usdaw's 'Save Our Shops' Campaign launched the new Future of Retail report and continued to push for an online sales tax. Restructures, redundancies, and closures covered Co-op distribution, Sainsbury's distribution, Ocado, BCM Fareva, Morrisons manufacturing, Tesco and Next. On the 'New Deal for Workers' Campaign we issued releases calling for improved minimum wage rates, along with highlighting negotiated pay increases at Sainsbury's/Argos, Tesco Bank, Tesco and Asda. On the 'Cost of Living' Campaign we launched the latest survey report 'Still Struggling', along with highlighting unfair pre-payment energy meter charges, high inflation rates, the need to reform in-work benefits, along with the disproportionate impact on women, disabled and Black workers.

The Union welcomed initiatives from Labour including policy gains made at the National Policy Forum, along with highlighting the benefits for Usdaw members in Keir Starmer's five missions. Usdaw opposed Tory policies detrimental to our members including economic mismanagement, energy price cap increases, failure to tackle the cost of living crisis, refusal to ban fire and rehire, rejecting statutory menopause leave, exploitation of migrant workers and anti-strike laws.

Media releases were issued supporting other Usdaw campaigns including: 'National Retail Workers' Day', 'Protect the Right to Strike', 'Me, Work and the Menopause', 'Christmas is not working', 'New Year's Day in Scotland', 'Call It Out', 'Not all Disability is Visible', 'Udaw for Labour', 'Stand up to Racism', 'Time to Talk', 'Dying to Work', 'Tackling Heat Stress' and 'Supporting Parents and Carers'. Other campaign press releases included the Black Members' Development Programme, the Political Fund ballot, International Women's Day, Sainsbury's improved recognition agreement, Boohoo recognition, Young Workers' Week, justice for Debenhams' workers, LGBT+ rights, legally challenging strike-breaking, action on violence against women and girls, TUC Heart Unions Week, disability rights, Workers' Memorial Day, new technology and automation, International Workers Day and ending one-sided flexibility.

A total of 297 press releases were issued during the year and Usdaw featured 6,672 times in the national and local print media, as well as 475 times on television and radio. The department also responded to a large number of requests for individual quotes and information.

Website and Social Media

Udaw's website provided vital resources for reps and members to quickly access help and advice. Regular emails provided instant updates for reps and members highlighting the Union's online publications, news, advice, surveys and campaigns. Over three quarters of visitors were using a tablet or smartphone to access the website, with 2.2 million pages viewed. 13,730 new members joined online during the year.

The Union continued to use social media to help deliver and amplify campaigns, with a focus on the activity of reps and members in their workplaces and town centres. Highlights included the first National Retail Workers Day, Respect for Shopworkers Week and mental health campaigns, as well as encouraging followers to vote Labour in the local elections. Audiences continued to grow and at the close of the year, total followers were 23,026 on Facebook, 13,558 on X and 2,718 on Instagram.

Arena/Network Magazines

Arena puts membership issues at the heart of its four editions. The magazine covered stories from different companies, sectors and regions of the country. It also included news, campaign updates and political and economic developments. *Arena* ensures that a diverse range of voices are seen and heard.

With the cost of living crisis still affecting members, the magazines focused on food banks, loan sharks, Universal Credit and cost of living support. There was information on night working and employee, festive and tenants' rights. The magazines also featured Usdaw members sharing their stories about their passions such as writing poetry, and others courageously talked about living and working with serious health conditions such as MS and cancer.

Udaw successfully launched its first digital issue of *Arena* in autumn. For the time being, there will be two paper and two digital editions per year.

Network's six bi-monthly issues brought in-depth information to activists on Usdaw campaigns including 'Freedom From Fear' and 'New Deal for Workers', as well as promoting Membership Week, Respect Week and National Retail Workers' Day. The magazine showcased the great work done by reps in the Activist in Depth and Organising Awards features.

Topics covered throughout the year included: the Political Fund, health features on thyroids, menopause, diabetes, conferences such as political, industrial, retail, pensions, young workers, LGBT+, Black members and ADM. There were features on rep teams who had successfully organised their workplaces and recruitment toolkits. There was also a strong focus on promoting the training Usdaw offers its reps and members with features on Summer School, the academies, and interviews with reps and members who have benefitted from Usdaw's training programmes.

Network aims to ensure that a diverse range of people, from across the UK, are given space in the magazine.

Campaigns

The Union's campaign activities had a major impact on the department throughout the year with a wide range of materials produced, mailings sent to reps and emails sent to members/reps. The campaigns were heavily promoted on the website and in the media and included: 'New Deal for Workers', 'Freedom From Fear', Respect Week, 'Supporting Parents and Carers', 'Mental Health Awareness' (including an Action Day on 10 October), National Retail Workers' Day, 'Pensions Awareness', Pride events, 'Save Our Shops', 'Lifelong Learning', 'Young Workers', 'Wear Red to Work Day', 'Me, Work and the Menopause', 'Not all Disability is Visible' and Legal Plus/FirstCall awareness.

Conferences/Events

The department made arrangements for the stage set, technical equipment, videos, sound, lighting, exhibition area and branding of the venue for the ADM at the Winter Gardens in Blackpool. The various Agendas, NEC Statements and Annual Report were printed and despatched. The document bags, lanyards and various other leaflets and documents were also produced.

The 2022 Organising Awards were held in January 2023, and arrangements were also made for the 2023 Organising Awards to be held in January 2024. The department produced the materials for the nomination process, as well as planning and liaising with the venue, regions and nominees for both the events.

Arrangements were made for exhibition stands and branding at the Labour Party Annual Conference and the TUC Annual Congress. Both conferences were promoted via social media and in the media.

Arrangements were also made for the branding of the rooms for the Union's Retail Trades and Industrial Conferences.

Literature and Promotional Materials

Various new and revised leaflets, booklets, posters and briefings/fact sheets were produced during the year to support activities in the regions and campaigns. Materials were updated throughout the year with the new branding when items needed re-ordering or revising and by the end of the year most of the materials the Union has in stock were in the new branding.

New items were added to the Union's range of merchandise and stock items were updated and re-ordered. Many other materials were produced/revised/reprinted, including Education and Training materials, items for the new members' packs, various certificates and forms, campaign merchandise, Health and Safety and Pensions materials, advertisements for external publications and publicity materials to support regional activities. A variety of materials were also produced, including leaflets, postcards and posters, to support membership weeks and organising throughout the year.



Research and Policy

The Role of the Department

The department provides a specialist research service for Usdaw negotiators as part of the Union's Industrial Relations Strategy. This includes analysing information on wages and conditions, and providing economic analysis and breakdowns of company finances.

The department is also involved in supporting the Union's Recruitment and Organising Strategy.

Another key role of the department is supporting and contributing to the development of the Union's campaigning and policy work, collecting evidence from members and drafting campaign materials.

The department supports and assists the National Officers in their negotiations with employers and their communications with members and reps covered by national agreements. The department also provides support to regional officials on a range of industrial matters and campaigning issues.

Industrial Relations Work

Researchers provided detailed information in support of national and local wage bargaining undertaken by National Officers, and in relation to broader industrial relations and sector development work. To assist with individual pay reviews, background information was prepared for national and local pay negotiations, including company ability to pay reports, pay comparators and cost of living information. Assistance was also provided to officials in the drafting of new or revised recognition and procedural agreements.

The department maintains a pay and conditions database of Usdaw agreements, enabling comprehensive national, regional and industry specific comparisons. The department monitors and analyses developments and trends on a wide range of collective bargaining and industrial relations issues in order to furnish negotiators with relevant supporting information.

Policy Work

The department has drafted Usdaw responses to consultations, announcements and developments on issues including:

- Automation, Technology, Artificial Intelligence and Skills.
- Retail Sector and High Streets.
- Childcare.
- Ending Violence and Sexual Harassment Against Women and Girls.
- Labour Market Enforcement.
- Low Pay.
- Statutory Code of Practice on Fire and Rehire.
- Fair Pay Agreements.
- The Impact of Brexit.
- Decarbonisation and Energy Costs.
- Mandatory Human Rights and Due Diligence Legislation.
- One-Sided Flexibility.
- Working Time Regulations.

The department liaised with other affiliated unions through TULO and drafted, submitted and moved amendments, as part of the Labour Party National Policy Forum process.

Support was also provided around consultation over amendments to company policies across the National Officer patches.

The department supported the Union's involvement in the Covid-19 Public Inquiry via the TUC and carried out interviews with members to support them in sharing their experiences with the inquiry.

Policy advice and research support was provided for the Annual Delegate Meeting, as well as various TUC, STUC, Wales TUC, ICTU and Labour Party events.

Campaign Work

The department planned and co-ordinated the Union's campaign calendar during the year, liaising with colleagues across the organisation to support a wide range of campaigning activity.

A New Deal for Workers

The department participated in the TUC working group on Fair Pay Agreements and supported the Union's involvement in the TUC Special Congress on Minimum Service Levels.

Motions, briefings and responses were drafted, including on one-sided flexibility, the cost of living crisis and working time regulations.

The department supported the Regional Secretary's involvement in the Scottish Government's Fair Work Working Group.

The department also updated Usdaw leaflets on agency worker rights and rights at work and the New Deal for Workers section of the website.

Cost of Living

The department drafted Usdaw's budget representations with a focus on the cost of living crisis, support for retail jobs, childcare and Universal Credit.

The Cost of Living Survey was redrafted and re-launched. The department compiled and launched a new booklet containing the results and analysis of the survey responses, which detailed the impacts of the crisis on our members.

Freedom From Fear

Working with the Media and Legal Departments, Research and Policy supported the 'Freedom From Fear' Campaign throughout the year.

Meetings were held with key stakeholders to plan the next steps in campaigning against violence and abuse towards shopworkers.

The department provided comprehensive support for Respect Week, including the organising of a Parliamentary reception in the House of Lords and the Union's engagement with over 50 politicians' visits to Tesco and Co-op stores.

National Retail Workers' Day

The department played a key role in the planning and organisation of the first ever National Retail Workers' Day in July, which proved popular with members and the public.

The purpose of the day was to draw attention to the vital work that our members do and the essential role they play in their communities.

Campaign materials were drafted for the day, along with guidance for reps and officials and communications with employers.

Following the event, the department surveyed the officials involved to gather feedback, which was overwhelmingly positive, and a further event is planned for 2024.

Recruitment and Organisation

The department has continued to support the regions in ongoing recruitment activities, providing information on new starters, inductions and store openings. Processes to deal with members' enquiries about becoming a rep and rep elections were administered.

The department also delivered the organising, content and administrative arrangements for conferences, events and meetings including the Retail Trades Conference, Industrial Conference and the Road Transport Committee.

Support continued to be provided around recruitment plans, monitoring and reporting and agreements. The department supported the organising of the Protect the Right to Strike protest.

Tesco Support Team

The team provides research and support to officials, reps and members on the Tesco agreements, including:

- Supporting the National Officer with detailed pay claim documents at negotiations, review of site agreements, and at consultation, committee and forum meetings.
- Co-ordinating pay ballots and compiling information in preparation for the 2024 pay review.
- Supporting the National Officer in discussions around updates to the Partnership Agreement, which resulted in improvements, including the introduction of a status quo clause in relation to grievance and disciplinary proceedings, and in meetings to review the roll-out of the new colleague contract.
- Regular communications, including email communications to members, the Tesco Reps' newsletter and the reps' area of the website.
- Continuing to deal with a high volume of email and telephone enquiries from members, reps and officials.
- Reconvening the health and safety working party for the first time in several years.
- Supporting collective consultations following the business' announcement to TUPE maintenance colleagues into the Tesco Group.
- Developing best practice guidance for recruiters on virtual inductions, following several observation sessions.
- Supporting discussions over the trial of four night working.

Equalities

Throughout the year, the disproportionate impact of the cost of living crisis on women, disabled, Black and LGBT+ workers remained at the forefront of the Union's campaign work.

Usdaw's groundbreaking new Breaking Down Barriers - Black Members' Development Programme opened for applications at ADM 2023. Significant work took place during the year to shape and plan the programme, promote it among the Union's Black members and encourage and support members to apply.

The first group of successful applicants took up places in September. The nine month programme is made up of classroom and non-classroom sessions that aim to support members to work towards individual development goals, navigate the Union, strengthen networks, and address the under-representation of Black members in Union structures.

Participants are supported by a group of mentors drawn from Usdaw's existing Black activists. The steering group continues to meet to monitor progress during the first pilot year. Applications for the second year will open at ADM 2024.

The Union's 'Me, Work and the Menopause' Campaign launched in March. The campaign aims to raise awareness of the menopause as a trade union and workplace occupational health and safety issue.

Campaign materials were developed with a steering group of women reps, to provide reps with the tools they need to open up conversations about the menopause and let women know the Union can support them at work.

The campaign has been well received, with hundreds of reps holding workplace activity during the year. It has also provided a starting point for negotiations that have introduced and improved menopause workplace policy during the year.



The section ran a survey to find out more about members' experiences of work and childcare. The results and comments helped to inform the Union's work on childcare during the year. Supporting Parents and Carers Spotlight Day was held on 28 June, and in line with the work on childcare, focused on the difficulties Usdaw members face finding affordable childcare to fit their working hours.

The theme 'Overstretched' reflected that both working parents and the UK's childcare system are under pressure. The day highlighted failures of the current system and raised awareness of free childcare entitlements and parental rights at work. The theme resonated with reps who organised record breaking workplace campaign activity, with over 1,200 orders.

Usdaw's second co-ordinated Day of Action on Mental Health took place on 10 October.

The event once again generated a huge response, with around 800 workplace campaign orders. It continued to demonstrate the importance of the Union's 'It's Good to Talk' Campaign in breaking down stigma and encouraging members to talk to their Union rep.

In July, the Union organised the 10th national Get-Together for LGBT+ activists. Around half attended for the first time and a third of members were under 35, showing the event continues to engage both younger members and those new to Union activity. The event focused on the struggle for LGBT+ equality and making unions welcoming spaces for LGBT+ members.

Black Members' Weekend Workshop took place in Birmingham in October. It remains the only Usdaw conference where Black and Asian members are guaranteed to be in the majority and is vital to ensuring the issues that matter to Black workers are reflected in the Union's work. The majority of members were new to the event, continuing to demonstrate that it is an effective vehicle for reaching out to Black members to become more active in the Union.

The section continued to support National Officers and officials in negotiations to introduce and improve policies on equality issues, including the menopause and family-friendly rights at work.

Politics

Elections

In 2023, there was intense political activity across the UK. In both local and parliamentary by-elections, there were real tests for both the Conservative Party and for the leadership of Rishi Sunak. These were the first set of elections since he became Prime Minister, and also the first set of elections since the introduction of Voter ID.

Local elections took place in most parts of England in May, and the Conservatives lost over 1000 seats. Labour were the main beneficiaries and became the largest party in local government.

There have been five parliamentary by-elections in England in 2023:

- Mid Bedfordshire.
- Selby and Ainsty.
- Somerton and Frome.
- Tamworth.
- Uxbridge and South Ruislip.

The Conservatives held Uxbridge and South Ruislip, with a massively reduced majority of just 495. The Conservatives lost every other seat, including those that had previously been considered 'safe' such as Mid Bedfordshire, where Labour overturned a majority of 24,664.

There is a similar picture in Scotland, with Labour winning the Rutherglen and Hamilton West seat from the Scottish National Party (SNP). These results show that Labour is winning across the country and demonstrate the importance of on the ground campaigning and policies that resonate with the electorate.

The Politics Section worked to encourage Usdaw members to vote, to be aware of the introduction of Voter ID if voting in person, and to register for postal votes. Email and social media were used to communicate key messages to members, and support and resources were given to members standing as candidates.

Political Activists Programme

The Political Activists Programme aims to increase political engagement amongst Usdaw members, develop capacity to engage in political campaign activity, and identify members who want to progress in politics.

Political Activists become part of a database of members which is used to support engagement in campaign activity, including the national campaign days and local political campaigning.

Usdaw's Political Activists have been campaigning on the ground in elections across the UK and have given support to Usdaw members standing as candidates.

Members of the Political Activists Programme also undertake training and development appropriate to their needs and are involved in wider political campaign work both locally and with the Union nationally.

Labour Party

As well as day-to-day work on the local and national links between Usdaw and the Labour Party, Usdaw made key gains for members and other working people through participating in Labour's National Policy Forum (NPF). There were constructive discussions throughout the NPF process, which led to significant policy decisions to tackle insecure employment, poverty pay and the mental health crisis, as well as to protect workers from violence, threats and abuse.

Usdaw had a strong presence at the Labour Party Annual Conference, including a fringe meeting on childcare, held with the Institute for Public Policy Research (IPPR). The conference built on the success of previous years, demonstrating that Labour is a government in waiting ahead of the next general election.



Usdaw Committees/ Group Activities

General Note

This section of the Annual Report provides brief information on the activities of the following committees/groups during the year:

- National Equalities Advisory Group.
- Political Committees.
- Retired Members.
- Road Transport Section.
- Sata.
- Young Workers.



National Equalities Advisory Group

The Union's National Equalities Advisory Group (NEAG) met regularly throughout the year, with reps attending in-person meetings. Activists who sit on NEAG and regional equality forums continued to share their passion for all things 'equality'. Reps organised a range of activities to tackle inequality at work, including:

- High profile campaign stands in workplaces and shopping centres on Spotlight Days, in Respect week, on 'Cost of Living' Campaign days and during membership weeks.
- Leading the Union's campaign activity on the Day of Action on Mental Health in October.
- Anti-racist campaigning and supporting Show Racism the Red Card.
- Regional conference sessions and rep events on the menopause at work and tackling racism.
- Workplace visits talking to members and non-members about a wide range of equality issues, including hidden disabilities.
- Equality sessions and stands at regional conferences, Pride festivals and other community events.
- Newsletters highlighting the work of the forums and raising the profile of equality-related campaigns.

Women's Equality

Spotlight Day's theme this year was 'Overstretched', highlighting both the difficulties working parents have finding childcare that fits around their work and the crisis in the UK childcare sector. Workplace campaigns raised awareness among members of free childcare entitlements and other available support.

A new workplace campaign 'Me, Work and the Menopause' launched in March. It was developed with a group of women reps and has been well received by reps wanting to raise awareness of menopause symptoms and highlight the menopause as an occupational health and safety issue.



Race Equality

The Union's new Breaking Down Barriers - Black Members' Development Programme opened for applications following ADM 2023. The programme builds on the positive work of the Union by providing tailored support, learning and development over a nine month period. The first 18 successful applicants took up their places in September.

The annual Black Members' Weekend Workshop took place in November, with the theme of Strengthening Networks, Breaking Down Barriers. The conference has a proven track record of encouraging activity and building the confidence of Black and Asian members.

The Union maintained its strong link with the anti-racism charity, Show Racism the Red Card, and reps organised support for Wear Red Day on 20 October.

LGBT+ Equality

In November, the Union held its 10th annual LGBT+ Get-Together in Birmingham. The get-together is a valuable space to hear from LGBT+ members and it continues to provide a route into the Union for younger members and those new to union activity.

Usdaw activists continued to raise the profile of the Union at Pride events up and down the country. They took to the streets to show their support and solidarity with LGBT+ workers in Liverpool, Bristol, Hull, Belfast, Norwich, Leeds, Newport, and Black Pride in London, to name a few.

Disability Equality

Disabled members and their families continue to be at the sharp end of the cost of living crisis and attacks to social security and employment rights. Throughout the year the Union continued to focus on hidden disabilities through our 'Not All Disability is Visible' Campaign, ensuring that Usdaw reps are ahead of the game when it comes to representing and advising disabled members about reasonable adjustments and their rights at work.

The Union's 'It's Good To Talk' Campaign continues to run all year round supporting reps wanting to organise around mental health as a workplace issue. The campaign remains a vital tool for reps to encourage members to speak to the Union where they are having issues at work, and to shift workplace cultures and attitudes around mental health. The Union supported a second co-ordinated Day of Action on Mental Health in October.

Political Committees

Regional Political Committees

The term of office for the current regional political committees is from 2022 to 2024 inclusive, and the committees have been in place since January 2022.

The role of the regional political committees is to:

- Organise, take part in, and encourage other members in their region to take part in campaigning.
- Encourage and offer support to Usdaw members in getting better engaged with the Labour Party as activists, members or General Committee delegates.
- Liaise with members of the Usdaw Parliamentary Group in their region in support of the campaign and engagement work of the committee.
- Work with the Regional Political Co-ordinator to support Usdaw key seats at general elections and Usdaw candidates in local elections.
- Liaise with the Regional Council, Regional Equalities Forums, Young Workers' Committee and Retired Members' Committee, engaging in joint working and campaigns when possible.

National Political Committee

The National Political Committee met in March and June 2023. The elected Chairs and Vice Chairs took up their places on the National Political Committee.

The work of the National Political Committee included:

- Co-ordinating Usdaw's campaigning work.
- Sharing best practice from the work done by the regional political committees.
- Delivering campaigns in local elections and by-elections.
- Increasing the political engagement of members, including the number of Usdaw General Committee delegates.

National Political Conference

A National Political Conference was held in March in Manchester. This was the first in-person conference held since the pandemic. The conference was addressed by the General Secretary and the President. The keynote speaker was Jonathan Reynolds, MP for Stalybridge & Hyde, Shadow Secretary of State for Business and Trade, and a member of Usdaw's Parliamentary Group. The focus of the conference was on preparing for the next general election, and the event gave delegates practical training and experience in campaigning. Bespoke training was delivered by the Labour Party and was followed by a campaigning session in the local area.

Even for delegates experienced in campaigning, this was a welcome session, and provided activists with campaigning tools to take back to their regions to help organise and deliver campaigning locally.

Usdaw's Parliamentary Group

Usdaw members, in the parliaments of the UK, form the Usdaw Parliamentary Group and champion the Union's campaigns and the interests of members.

MP	Constituency
Mike Amesbury	Weaver Vale
Ben Bradshaw	Exeter
Stella Creasy	Walthamstow
Anneliese Dodds	Oxford East
Stephen Doughty	Cardiff South & Penarth
Chris Elmore	Ogmore
Bill Esterson	Sefton Central
Yvonne Fovargue	Makerfield
Nia Griffith	Llanelli
Carolyn Harris	Swansea East
Mark Hendrick	Preston
Gerald Jones	Merthyr Tydfil & Rhymney
Siobhain McDonagh	Mitcham & Morden
Jim McMahon	Oldham West & Royton
Anna McMorrin	Cardiff North
Ed Miliband	Doncaster North
Navendu Mishra	Stockport
Ian Murray	Edinburgh South
Alex Norris	Nottingham North
Yasmin Qureshi	Bolton South East
Jonathan Reynolds	Stalybridge & Hyde
Matt Rodda	Reading East
Jeff Smith	Manchester Withington
Jo Stevens	Cardiff Central
Gareth Thomas	Harrow West
Liz Twist	Blaydon
Valerie Vaz	Walsall South
Christian Wakeford	Bury South
Andrew Western	Stretford & Urmston

House of Lords

Title
Baroness Anderson of Stoke-on-Trent
Lord Bassam of Brighton
Lord Cashman
Baroness Chapman of Darlington
Lord Coaker
Lord McAvoy
Baroness Smith of Basildon

Scottish Parliament

MSP	Constituency
Jackie Baillie	Dumbarton
Mark Griffin	Central Scotland Region
Daniel Johnson	Edinburgh Southern
Anas Sarwar	Glasgow Region

Welsh Senedd

MS	Constituency
Jayne Bryant	Newport West
Vikki Howells	Cynon Valley
Sarah Murphy	Bridgend

Retired Members

A retired members' committee operates in every region and usually meets up to four times a year.

Retired Members' Conference

The 32nd Annual Retired Members' National Conference was held in May at Head Office, which was chaired by Usdaw's President, Jane Jones.

Guest speakers from Age UK were invited to the conference. Jane Bevan gave an overview of the organisation and information on how to cope with the cost of living crisis. Amanda Barrell spoke about the current crisis around funeral poverty, dealing with bereavement and the rather difficult topic around planning for end-of-life care.

Ushaw's Pensions Officer also spoke about Auto Enrolment and the importance of building on this legislation to ensure that future generations are not sleepwalking into retirement destitution.

The conference gave each of the regional committee reps an opportunity to share the issues they had debated over the previous year and the activities and campaigns they had been involved in.

The retired members appointed two delegates to be represented at the NPC Trade Union Working Party meetings.

Geoff Page, Eastern Region, has continued to embrace his position on the National Executive Council for the NPC. Geoff regularly shares correspondence and reports from his meetings and any articles of interest are incorporated in the Ushaw retired members' quarterly newsletters, which are circulated to the retired member committees.

Reconstruction of Retired Member Committees

The triennial reconstruction of the retired member committees took place over the summer and the new committee members are now in place.

Retired Members' Website

The retired members' section on the Ushaw website has been regularly updated throughout the year and has featured various articles, including the State Pension errors being reported by the DWP, how to claim pension credit and regular updates regarding the triple lock guarantee.



Road Transport Section

The section continued to focus on its set objectives, which are to:

- Raise Usdaw's profile as a transport union.
- Co-ordinate road transport activities across Usdaw's seven regions.
- Authorise claims to the Road Transport Distress Fund.
- Keep transport members updated on relevant legislation.
- Raise awareness among distribution workers of health and safety issues, forthcoming legislation etc.

Following last year's elections, the National Road Transport Committee met regularly throughout the second year of its term of office. The committee closely monitored developments in the sector, considering how they could affect the Union's Road Transport members. The current term of office runs until December 2024.

Key Developments

Automated Vehicles Bill

The Automated Vehicles Bill was announced by the Government within the King's Speech. The purpose of the bill will be to introduce a regulatory framework for self-driving vehicles in the UK. Only vehicles that can follow traffic rules without the need for a human to monitor them will be classified as self-driving or driverless cars.

The responsibilities of companies that develop, operate, and report on self-driving vehicles are set out in the bill. In cases where the car is driving itself, the vehicle manufacturer, rather than the passenger, will be responsible for it, effectively granting users immunity from prosecution. Supporters of the bill argue that driverless vehicles will reduce costs, injuries, and fatalities on UK roads, with 88% of all reported road accidents involving human error as a contributory factor. However, there are significant concerns around the long-term effect on jobs.

The National Highway's Project Ping

National Highways approached fleet operators during the year, inviting them to join their Project Ping initiative trial. The scheme uses the existing network of cameras on the Strategic Road Network (SRN) to spot instances of dangerous driving behaviours such as speeding, mobile phone offences, or close following. In order to take part, companies are required to provide National Highways with their vehicle registration numbers and are then 'pinged' when an incident occurs.

Upwards of 95,000 vehicles from over 800 organisations were involved in the latest stage of the trial, which ran from September to December. Any fleet that agrees to take part must make a commitment that they will take action to remedy any issues that are identified through Ping.

Ongoing Work

Drivers' Handbook

This continues to be a very popular publication, which is used regularly by officials and reps in recruitment exercises. The handbook was revised during the year to ensure that all sections are up to date. The Drivers' Handbook is also available on the Usdaw website and is extremely popular with Union members.

Road Transport Distress Fund

The fund provides, in appropriate cases, for the relief of hardship suffered by any member of the fund as a result of incurring a fine and/or costs in respect of any traffic offence arising out of and in the course of the member's employment. At the end of the year, membership stood at 3,405.

Information and Advice

The section continues to offer support and advice to individual members, Shop Stewards, Regional Co-ordinators and Area Organisers on transport-related issues.



Sata

Membership

Sata (the Supervisory, Administrative and Technical Association) is the specialist professional section of the Union.

The Sata membership comes from a variety of Usdaw's sectors, but is mainly comprised of managers, supervisors, call centre staff and office workers.

Organisation

The Union continues to seek to increase the number of Sata members covered by our agreements, looking for new opportunities both within our existing agreements and by securing new agreements to strengthen our organisation and influence.

Developments

Membership of Sata fell to 6,084 with the number of new members joining offset against restructures across the sector that have had an adverse impact on membership.

Pay negotiations in the sector have increasingly focused on performance related pay.

The Tesco Salaried Forum met three times in 2023 and submitted a claim to negotiate terms and conditions.

In January 2023, Tesco embarked on a restructure affecting Lead Managers and introducing Shift Leader roles into all remaining large stores.

Pay and Conditions

- **Co-operative Employers' Retail Association Sata Agreement** – Central Co-op, Heart of England Co-op and Radstock Co-op colleagues received a 5% increase to all rates, effective from 1 July 2023. Lincolnshire Co-op colleagues received a 6% increase to all rates, effective from 3 September 2023.
- **Next Distribution Sata** – Effective from 1 August 2023, a £1 per hour increase was applied to all job roles. In addition, for Team Managers, a recognition payment of £16 per shift was agreed for any Team Manager who needs to perform manager in charge duties, which is based on the differential between an Assistant Site Manager and competent Team Manager pay rate.
- **Well Pharmacy** – Effective from 1 October 2023, increases were performance related: 5% for outstanding performance, 4.5% for great performance, 4% for good performance, 2.5% for needs development and 0% for unsatisfactory performance.



Young Workers

During the year, the National Young Workers' Committee met three times. As well as helping to plan and run the National Young Workers' Weekend, the committee was involved in a number of other activities in the regions.

National Young Workers' Weekend

The weekend was held at Head Office on 4 and 5 November.

At the time of the weekend, there were 55,703 members aged 26 or under, constituting 15% of the total membership.

The weekend, which was organised by the Education and Training Department, was attended by 18 members, together with three staff members and Val Cooke, National Executive Council member.

Details of the delegates who attended the weekend are as follows:

Sector		Gender		Ethnic Origin	
Retail	Non-Retail	Men	Women	White	Black/ Ethnic Minority
18	0	10	8	17	1

The weekend provided an opportunity for young Usdaw reps to find out more about the work of the Union and how to get more involved. At the same time, delegates were able to debate the issues that affect young people both in work and society. The National Young Workers' Committee helped in the running of the weekend which was based around a series of lively and interesting workshops focusing on the next UK general election, to improve engagement and support young reps and activists, and also on the cost of living crisis. Once again, the weekend proved an ideal way for young members to participate in the Union and for many to take the first step on the road to greater involvement in activity on behalf of Usdaw.

Other Activities

During the course of the year, 222 Usdaw activists aged 26 and under attended training courses arranged by the Education and Training Department.

Usdaw was represented at the TUC Young Workers' Conference by:

- Charlotte Barclay-Smith (Edinburgh West)
- Brooke Boyer (South East London General)
- Morgan Eckersley (Norfolk Area Tesco)
- Charlie Gough (NW Tesco Retail No.6)
- Boriana Nacheva (Cheltenham and Tewkesbury)
- Daniel Thomason (Sheffield and District PT)



Connections with Other Organisations

Affiliations

During the year, the Union reviewed its international affiliations to ensure value for members' money. As a result, the Union disaffiliated from the International Transport Federation and the European Transport Federation. The Union continues to engage in international solidarity through our affiliation to the TUC, which in turn affiliates to the European Trade Union Confederation and the International Trade Union Confederation. In addition, the Union maintained affiliations to a number of international and national organisations, including the European Federation of Food Agriculture and Tourism Trade Unions (EFFAT), the International Union of Food and Allied Workers' Associations (IUF), the Involvement and Participation Association (IPA), the National Pensioners' Convention (NPC) and Unions21.

Trades Union Congresses/Conferences

British TUC

This year's British Trades Union Congress was held in Liverpool in September.

An Usdaw delegation attended Congress, and a delegation pre-meeting was held to discuss the conference and motions.

Udaw's motions on 'Tackling One-Sided Flexibility' and 'Childcare: Delivering a Just and Prosperous Society' were moved by the Union and unanimously carried by Congress. Usdaw spoke in support of motions regarding 'Affordable Housing for Key Workers', 'Technology in the Workplace' and 'RPI - Save the Rate'. We were also proud to second a motion on 'Collapse of Wilko - Save the High Street' from GMB.

Udaw rep, Charlie Gough, received the TUC Congress Award for Youth and also spoke at a fringe meeting on 'Building a Movement for the Future'.

Paddy Lillis, General Secretary and Joanne Cairns, Head of Research and Policy, were re-nominated and elected to serve as Usdaw's representatives on the TUC General Council. Dave McCrossen, Deputy General Secretary, was re-nominated and elected to the General Purposes Committee.

TUC Women's Conference

This year's conference took place in London in March.

Udaw's motions on 'Women and the Cost of Living Crisis' and 'Action to End Sexual Harassment', which formed part of the composite motion on tackling sexual harassment, were adopted by the conference.

Su Patel was re-elected to Section B of the Women's Committee, the section specifically allocated for Black women.

TUC Black Workers' Conference

This year's conference took place in London in May and was the first time the conference had returned to an in-person event since the pandemic.

Udaw's motion on 'Building an Anti-Racist Movement' was adopted by the conference.

Maureen Loxley, MBE, stood for Section A of the TUC Black Workers' Committee and was re-elected.

TUC Disabled Workers' Conference

This year's conference took place in Bournemouth in July.

Udaw's motion on 'Building a Movement of Protest' was adopted by the conference.

Val Cooke, National Executive Council member, stood for Section A of the TUC Disabled Workers' Committee and was elected.

TUC LGBT+ Conference

This year's conference took place in London in June.

Udaw's motion on 'Tackling Unequal Health Outcomes' was adopted by the conference.

Neil Smale stood for Section A of the TUC LGBT+ Committee and was re-elected.

Special TUC Congress

The TUC held a Special Congress in London on 9 December to discuss the response to the Government's anti-union Minimum Service Level regulations. Usdaw's General Secretary moved the TUC General Council Statement and a delegation attended to represent the Union.

Others

Delegations also attended the ICTU Biennial Conference, the Scottish Trades Union Congress, the STUC Black Workers' Conference, the STUC Disabled Workers' Conference, the STUC LGBT+ Conference, the STUC Women's Conference, the STUC Youth Conference and various regional TUC Conferences held during the year.

Labour Party Conferences

Labour Party Conference

The Labour Party Conference took place in Liverpool in October. The conference was attended by an Usdaw delegation, who played an active role in the proceedings throughout.

The Union's motion on 'Challenges Facing Retail and the High Street' was accepted into a composite motion, which was moved by the President and agreed by conference.

The Union's motion on 'Education, Skills and Industrial Strategy' was also accepted into a composite motion. The Union seconded this motion, which was passed by conference.

In partnership with the Institute for Public Policy Research (IPPR), Usdaw also hosted a fringe event on Childcare, where speakers included Paddy Lillis, General Secretary, Bridget Phillipson, Shadow Education Secretary, Shabana Ismail, Usdaw Co-op Rep and Melanie Wilkes, Interim Associate Director for Work and Welfare State, IPPR. There was a thought-provoking debate on the issues faced by working parents as a result of a lack of adequate childcare facilities, as well as the opportunities for a Labour Government to support workers through these challenges.

Attendees at the conference were able to get information about the work of the Union and our campaigns from the Usdaw stand in the exhibition area.

National Conference of Labour Women

The conference took place on the day preceding the Labour Party's Annual Conference on 7 October in Liverpool.

Usdaw submitted a motion on the subject of 'Women as Working Parents and Carers', which was composited and adopted by conference.

Usdaw's delegation played a full and active role in the conference sessions.

Others

Delegations also attended the Scottish Labour Party Conference, the Welsh Labour Party Conference, the Scottish Labour Women's Conference, the Welsh Labour Women's Conference and various regional Labour Party Conferences held during the year.



National Executive Council Members

As at 31 December 2023

President

Jane Jones



General Secretary

Paddy Lillis



A – South Wales and Western Region

Tracy Cannard

Barbara Wilson



G – Scottish Region

Susan Donaldson

Robert Killin



C – Eastern Region

Val Cooke

Simon Vincent



H – Southern Region

John Barstow

Keith Jones



E – Midlands Region

Karl Lockley

Kate MacLeod



K – North West Region

Robert Bell

Samantha Davies



F – North Eastern Region

Jo Crumplin

Mike Dixon



Janet Hankin



Regional Council Members

As at 31 December 2023

A – South Wales and Western

Name	Branch
Phil Birkett	Bristol
Nick Lewis	Cardiff Central
Tracey Lowther	Somerset General
Anne Meacock	Swansea General
Tracy Millard	Gloucester General
Elliot Osborne	East Cornwall
Beverley Perkins	Newport and District
George Petrie	North Gwent
Kay Timbrell	Stroud, Cotswold and District
Debbie Wilson	Plymouth and District General

C – Eastern

Name	Branch
Maxwell Adu-Yeboah	South Essex and East London General
Clare Connolly	Fenland Tesco
Jacqui Cross	East Norfolk Retail
Richard Groves	Tesco Dagenham Distribution Centre
Samantha Harvey	East of England Co-op
Brian Lewis	Norwich and Mid Norfolk
Emma Padden	North Essex Retail
Sally Payne-Gamble	Bucks & Hemel Food Retail
Stephen Peaty	Eastern Distribution No.1
Relebohile Phakoe	West Essex Retail

E – Midlands

Name	Branch
Kelvin Blake	West Midlands General No.2
Tammy Caven	North Midlands Area Tesco
Gareth Coates	West Midlands Warehousing No.1
Julie Haycraft	Lincoln Co-op
Jackie Hendry	East Midlands Pharmaceuticals
Richard McDermid	West Midlands Sata
Claire Thomas	Black Country Area Tesco
Michelle Whitehead	Midcounties Co-op
Simon Willmott	Boots Logistics (Nottingham)

F – North Eastern

Name	Branch
Pat Buttle	Darlington (S)
Sandra Gair	Sainsbury's Northern
Janet Haggis	Humberside Tesco
Innocent Igiehon	Leeds and District Tesco
Charlie Johnson	North & East Yorkshire Co-op
Laurence Mager	East Yorkshire and the Humber Morrisons
Amanda Naylor	North Yorkshire Morrisons
Angela Partington	Leeds PT
Sharon Sheldon	South Yorkshire Tesco
Tracy White	North Yorkshire Tesco

G – Scottish

Name	Branch
Caroline Baird	Glasgow South East
Kelly Burr	Aberdeenshire North East
Kevin Hart	Glasgow City South
Darroch Logan	Inverness and District
Neil MacDonald	North Highlands
Laura McLean	Dundee City
Derek Mitchell	Kettle Produce Fife
Lillias Peden	West Lothian
James Redpath	Borders
Paul Watson	Tesco Banking Glasgow

H – Southern

Name	Branch
Andrew Coley	Bournemouth and South Dorset
Carrie Fineran	Isle of Wight PT
Julie Hart	Sussex No.1
Vanessa Jackson	Solent
Jiri Marek	DHL Logistics Dartford
Susan Olech	South West London
Uday Pandya	Croydon Metropolitan
Sujata Patel	West Surrey
Cliff Price	Sittingbourne Morrisons Distribution
Peter Wright	Mid Sussex

K – North West

Name	Branch
Terry Adair	NW Recognition
Ian Beesley	NW Co-op Group Distribution
Thomas Boyne	NW General
Elaine Cole	NW Co-op Group Retail
Trish Elder	NW Tesco Retail No.5
Patricia Gibbons	NW Tesco Retail No.1
Kate Hill	NW Tesco Retail No.8
Michael Kewin	NW B&M Distribution
Jackie McNeill	NI Co-op Group
Viki Miller	NW Argos Sainsbury's Retail No.2
Tony Penn	NW Evri
Dawn Uytendhal	NW Morrisons Manufacturing

Central Officials

Paddy Lillis	General Secretary
Dave McCrossen	Deputy General Secretary
Brendan Duggan	Executive and Administration Officer
Nick Walker	Central Treasurer

Trustees

Robert Bell	Jo Crumplin

Auditor

BDO LLP

Scrutineers

Susan Hallam	Amanda Owens

Udaw Group of MPs

Mike Amesbury	Ben Bradshaw
Stella Creasy	Anneliese Dodds
Stephen Doughty	Chris Elmore
Bill Esterson	Yvonne Fovargue
Nia Griffith	Carolyn Harris
Mark Hendrick	Gerald Jones
Siobhain McDonagh	Jim McMahon
Anna McMorris	Ed Miliband
Navendu Mishra	Ian Murray
Alex Norris	Yasmin Qureshi
Jonathan Reynolds	Matt Rodda
Jeff Smith	Jo Stevens
Gareth Thomas	Liz Twist
Valerie Vaz	Christian Wakeford
Andrew Western	

General Secretary's Report on the Union's Finances

For the year ended 31 December 2023



The following pages contain the financial statements for the Union for the year to 31 December 2023.

2023 was a rewarding year for the hard work of Usdaw's activists with an impressive 91,000 new members recruited, which was an increase of more than 8,000 on the previous year. Crucially, recruitment activity was up year on year in each of the seven regions and in all four of Usdaw's 'Big 4' retail agreements with Tesco, Sainsbury's Morrisons and the Co-op Group.

However, despite this tremendous achievement, the overall increase in membership of 3,742 was modest and represented growth of just 1%. Usdaw's ambition for 2024 is to achieve better than 100,000 new members recruited and continue building membership back to its pre-pandemic levels of over 400,000.

The financial results for the twelve months to 31 December 2023 show that Usdaw has posted an operating surplus with income exceeding expenditure by £2.3 million.

The impact of income from investments and the increase in the market value of the Union's investments result in a total recognised surplus of £7.5 million. However, the purpose of investments is not to support everyday spending but to grow the Union's reserves and strengthen its financial position for the future.

Behind these numbers lies the challenge, as reported in previous years, that Usdaw's contribution income is in continued decline. Contribution income in 2023 was £40.4 million, which is no more than it was ten years ago.

The main reason for this is the recent, sharp fall in overall membership of 50,000 since 2019 and the financial impact of falling membership would have been far worse if not for the implementation of a single contribution rate in July 2021, which is now paid by 65% of Usdaw's members.

Membership, and the income from membership, must be built back if Usdaw is to continue operating at its current level.

The National Executive Council is also mindful of the challenge of keeping year on year increases in spending to a minimum without reducing the quality or extent of the service that the Union offers members but this remains difficult against the backdrop of high inflation, something Usdaw's members will be keenly aware of from the impact on their own household budgets.

Usdaw's Political Fund stood at £1.5 million at the end of the financial year and, on behalf of the National Executive Council, I want to thank all of the Union's members and activists who resoundingly voted yes in 2023 to Usdaw keeping its political fund. This not only helps our voice be heard in Westminster and the Devolved Governments of Scotland, Wales and Northern Ireland on the campaigns which matter the most to our members' everyday lives but will also help Usdaw support the best chance in more than ten years of returning Labour to government.

As usual, the National Executive Council and I wish to place on record our thanks to all the Union's members, activists and staff for their contribution to the Union during challenging and uncertain times.

Usdaw Financial Statements

For the year ended 31 December 2023

Advisors

Auditors

BDO LLP, 55 Baker Street, London W1U 7EU

Bankers

Unity Trust Bank plc, Four Brindleyplace, Birmingham B1 2JB

Insurance Advisors

Berns Brett Limited, The Old Court House, 191 High Road, South Woodford, London E18 2QF

Legal Advisors

Allan McDougall McQueen LLP

3 Coates Crescent, Edinburgh EH3 7AL

Bates Wells & Braithwaite Ltd

29 Lower Brook Street, Ipswich IP4 1AQ

Beecham Peacock LLP

7 Collingwood Street, Newcastle Upon Tyne NE1 1JE

Pattinson & Brewer

2nd Floor, Mermaid House Street, London EC4V 3DB

Slater and Gordon UK Limited

58 Mosley Street, Manchester M2 3HZ

Thompsons Solicitors (Northern Ireland) LLP,

171 Victoria Street, Belfast BT1 4HS

Thompsons Solicitors LLP

Congress House, Great Russell Street, London WC1B 3LW

Thompsons Scotland Limited

285 Bath Street, Glasgow G2 4HQ

Property Advisors

Graham + Sibbald, 72 - 75 Marylebone High Street, London W1U 5JW

Pension Scheme Advisors

Aon, 40 Spring Gardens, Manchester M2 1EN

Tax Advisors

Crowe UK LLP, 55 Ludgate Hill, London, EC4M 7JW

Statement of Responsibilities of the National Executive Council for the Year Ended 31 December 2023

The legislation relating to trade unions requires the Union to submit a return for each calendar year to the Certification Officer for Trade Unions and Employers' Associations. This return contains accounts, which must give a true and fair view of the state of affairs of the Union at the year end and of its transactions for the year then ended. The accounts set out on the following pages have been prepared on the same basis and are used to complete the return to the Certification Officer for Trade Unions and Employers' Associations.

In relation to the Union of Shop, Distributive and Allied Workers these requirements are the responsibility of the National Executive Council. The accounts of the Union have been prepared in accordance with United Kingdom Generally Accepted Accounting Practice (United Kingdom Accounting Standards and applicable law). In preparing the accounts the National Executive Council is required to:

- select suitable accounting policies and then apply them consistently;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed;
- prepare the accounts on the going concern basis unless it is inappropriate to do so.

The National Executive Council is responsible for keeping proper accounting records and establishing and maintaining a satisfactory system of control over its records and transactions in order to comply with the Trade Union and Labour Relations (Consolidation) Act 1992. They are also responsible for safeguarding the assets of the Union and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities. The Union is also responsible for the maintenance and integrity of the corporate and financial information included on the Union's website. Legislation in the UK governing the preparation and dissemination of accounts may differ from legislation in other jurisdictions.

Opinion

In our opinion, the financial statements:

- give a true and fair view of the state of the Union's affairs as at 31 December 2023 and of its result for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Trade Union and Labour Relations (Consolidation) Act 1992.

We have audited the financial statements of the Union of Shop, Distributive and Allied Workers ("the Union") for the year ended 31 December 2023 which comprise the Statement of Comprehensive Income, the Balance Sheet, the Statement of Changes in Equity, the Cash Flow Statement and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" (United Kingdom Generally Accepted Accounting Practice).

Basis for Opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Independence

We are independent of the Union in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements.

Conclusions Relating to Going Concern

In auditing the financial statements, we have concluded that the National Executive Council's use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the Union's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the National Executive Council with respect to going concern are described in the relevant sections of this report.

Other Information

The National Executive Council is responsible for the other information. The other information comprises the information included in the Annual Report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Matters on Which We Are Required to Report by Exception

We have nothing to report in respect of the following matters to which the Trade Union and Labour Relations (Consolidation) Act 1992 ("the Act") requires us to report to you if, in our opinion:

- proper accounting records have not been kept in accordance with the requirements of the Act; or
- the Union has not maintained a satisfactory system of controls over its transactions; or
- the financial statements are not in agreement with the accounting records and returns; or
- we have not received all the information and explanations we require for our audit.

Responsibilities of the National Executive Council

As explained more fully in the Statement of Responsibilities of the National Executive Council, the National Executive Council is responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the National Executive Council determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the National Executive Council is responsible for assessing the Union's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the National Executive Council either intend to liquidate the Union or to cease operations, or have no realistic alternative but to do so.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Extent to which the audit was capable of detecting irregularities, including fraud

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

Non-compliance with laws and regulations

We gained an understanding of the legal and regulatory framework applicable to the Union and the industry in which it operates, drawing on our broad sector experience, and considered the risk of acts by the Union that were contrary to these laws and regulations, including fraud. We focused on laws and regulations that could give rise to a material misstatement in the financial statements, including, but not limited to, the Trade Union and Labour Relations (Consolidation) Act 1992, UK tax legislation and equivalent local laws and regulations.

We also completed the following procedures:

- Review of minutes of meetings of those charged with governance for any instances of non-compliance with laws and regulations;
- Review of correspondence with regulatory and tax authorities for any instances of non-compliance with laws and regulations;
- Review of financial statement disclosures and agreeing to supporting documentation to assess compliance with applicable laws and regulations;
- Review of legal expenditure accounts to understand the nature of expenditure incurred; and
- Discussion with management, including consideration of known or suspected instances of non-compliance with laws and regulations.

Fraud

As part of designing our audit, we determined materiality and assessed the risks of material misstatement in the financial statements, including how fraud may occur by enquiring of management of its own consideration of fraud. In particular, we looked at where management made subjective judgements, for example in respect of significant accounting estimates that involved making assumptions and considering future events that are inherently uncertain. We also considered potential financial or other pressures, opportunity and motivations for fraud. As part of this discussion we identified the internal controls established to mitigate risks related to fraud and how management monitor these processes.

Audit procedures performed by the engagement team included:

- Reading minutes of meetings of those charged with governance for any evidence of fraud or suspected fraud;
- In addressing the risk of fraud through management override of controls, we tested journal entries and other adjustments for inappropriate or unusual journals outside of our expectations, as well as for any significant transactions outside the normal course of business, taking into consideration the scope for management to manipulate financial results;
- Assessing the design and operating effectiveness of controls and procedures relevant to the preparation of the financial statements and the detection and prevention of irregularities and fraud;
- Challenging the assumptions and judgements made by management for key estimates, in particular in relation to income recognition and calculation of provisions.

Our audit procedures were designed to respond to risks of material misstatement in the financial statements, recognising that the risk of not detecting a material misstatement due to fraud is higher than the risk of not detecting one resulting from error, as fraud may involve deliberate concealment by, for example, forgery, misrepresentations or through collusion. There are inherent limitations in the audit procedures performed and the further removed non-compliance with laws and regulations is from the events and transactions reflected in the financial statements, the less likely we are to become aware of it.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of Our Report

This report is made solely to the members of the Union of Shop, Distributive and Allied Workers, as a body, in accordance with the provisions of the Trade Union and Labour Relations (Consolidation) Act 1992. Our audit work has been undertaken so that we might state to the Union those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Union as a body, for our audit work, for this report, or for the opinions we have formed.

BDO LLP, Statutory Auditor
London, UK

BDO LLP is a limited liability partnership registered in England and Wales (with registered number OC305127).

Statement of Comprehensive Income for the Year Ended 31 December 2023

	Note	2023	2022
		£ 000s	£ 000s
Income			
Membership Contributions.....	1	40,395	37,707
Other Income.....	2	458	604
		-----	-----
		40,853	38,311
 Expenditure			
Provision of Benefits.....	3	690	711
Political Expenditure.....	4	1,445	1,303
Legal Costs.....	5	389	231
Personnel Costs.....	6	21,068	22,677
Operating Expenses.....	7	14,914	13,550
		-----	-----
		(38,506)	(38,472)
 Operating (Deficit)/Surplus.....		2,347	(161)
Investment Income.....	8	5,744	717
Net Interest on Defined Benefit Pension Liability.....	9	(563)	(763)
		-----	-----
 Surplus/(Deficit) for the Financial Year before Taxation.....		7,528	(207)
Taxation.....	10	--	--
		-----	-----
 Surplus/(Deficit) for the Financial Year after Taxation.....		7,528	(207)
		-----	-----
 Statement of Other Comprehensive Income for the year ended 31 December 2023			
Surplus/(Deficit) for the Financial Year.....		7,528	(207)
Actuarial (loss)/gain recognised in the Pension Scheme.....	16	(10,160)	25,476
		-----	-----
 Total Recognised (loss)/gain Relating to the Financial Year.....		(2,632)	25,269
		-----	-----

The notes on pages 63 to 73 form part of these financial statements.

Balance Sheet As At 31 December 2023

	Note	2023		2022	
		£	£	£	£
		000s	000s	000s	000s
Fixed Assets					
Tangible Assets	11		17,324		17,482
Investments	12		84,948		84,698
			-----		-----
			102,272		102,180
Current Assets					
Debtors	13	3,605		2,933	
Cash at Bank and in Hand	14	4,134		2,500	
		-----		-----	
		7,739		5,433	
Creditors Falling Due in Less Than One Year					
	15	(2,030)		(2,241)	
		-----		-----	
Net Current Assets			5,709		3,192
			-----		-----
Net Assets Excluding Pension Liability			107,981		105,372
Pension Liability	16		(20,738)		(15,497)
			-----		-----
Net Assets Including Pension Liability			87,243		89,875
			-----		-----
Represented by					
General Revenue Account			72,422		74,858
Branch Revenue Account			13,112		13,389
Federation Funds Account			213		197
Regional Recruitment Fund			36		47
			-----		-----
			85,783		88,491
Political Fund No.1 Account			976		694
Political Fund No.2 Account			363		578
Regional Political Funds			121		112
			-----		-----
			87,243		89,875
			-----		-----

The National Executive Council approved these accounts on 18 March 2024

Signed Jane Jones, President
 Paddy Lillis, General Secretary

The notes on pages 63 to 73 form part of these financial statements.

Statement of Changes in Equity for the Year Ended 31 December 2023

	General Revenue Account £000s	Branch Revenue Account £000s	Federation Funds Account £000s	Regional Recruitment Fund £000s	Political Fund No.1 Account £000s	Political Fund No.2 Account £000s	Regional Political Funds £000s	Total £000s
At 1 January 2023.....	74,858	13,389	197	47	694	578	112	89,875
Surplus/(Deficit) for the Financial Year.....	7,724	(277)	16	(11)	282	(215)	9	7,528
Actuarial Loss recognised in the Pension Scheme.....	(10,160)	--	--	--	--	--	--	(10,160)
At 31 December 2023	72,422	13,112	213	36	976	363	121	87,243
	=====	=====	=====	=====	=====	=====	=====	=====
At 1 January 2022.....	50,303	12,958	177	52	539	473	104	64,606
(Deficit)/Surplus for the Financial Year.....	(921)	431	20	(5)	155	105	8	(207)
Actuarial Gain recognised in the Pension Scheme.....	25,476	--	--	--	--	--	--	25,476
At 31 December 2022	74,858	13,389	197	47	694	578	112	89,875
	=====	=====	=====	=====	=====	=====	=====	=====

The notes on pages 63 to 73 form part of these financial statements.

Cash Flow Statement for the Year Ended 31 December 2023

	Note	2023	2022
		£ 000s	£ 000s
Operating Surplus/(Deficit)		2,347	(161)
Depreciation.....	7a	2,161	2,070
Profit on Sale of Fixed Assets.....	7a	(256)	(34)
Increase in Debtors.....		(672)	(391)
(Decrease)/Increase in Creditors.....		(211)	20
Pension Costs Charged to Income and Expenditure.....		2,299	5,678
Pension Contributions by Employer.....		(7,781)	(7,050)
		-----	-----
Net Cash Inflow from Operating Activities		(2,113)	132
 Cashflows from Investing Activities			
Proceeds on the Sale of Tangible Assets.....		--	129
Payments to Acquire Tangible Assets.....	11	(1,747)	(767)
Proceeds from the Sale of Investments.....	12	18,204	5,697
Payments to Acquire Investments.....	12	(14,531)	(6,640)
Investment Income.....	8	1,821	444
		-----	-----
Net Cash Inflow/(Outflow) from Investing Activities		3,747	(1,137)
 Movement in Cash and Cash Equivalents in the Year		1,634	(1,005)
At Beginning of Year.....		2,500	3,505
		-----	-----
At End of Year.....		4,134	2,500
		-----	-----

The notes on pages 63 to 73 form part of these financial statements.

Accounting Policies for the Year Ended 31 December 2023

The following accounting policies have been consistently applied in dealing with items which are considered material in relation to the Union's financial statements.

Basis of Preparation

The financial statements have been prepared in accordance with FRS102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS102"). The financial statements have been prepared under historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant notes to the financial statements. The financial statements have been prepared in sterling, which is the functional currency of the Union. The monetary amounts of these financial statements are rounded to the nearest pounds.

Trade Unions are governed by the Trade Union and Labour Relations (Consolidation) Act 1992. Under that Act the accounts of Trade Unions are required to give a true and fair view. Therefore, the accounts of Trade Unions are prepared under FRS102. However, as a Trade Union is not a company the Regulations that form the basis of disclosures under FRS102 have been adapted as considered necessary to ensure the accounts give a true and fair view to the members of the Trade Union.

The Union is a public benefit entity.

Income is recorded on an accruals basis. Expenditure is charged to the Income and Expenditure Account on an accruals basis including irrecoverable VAT.

Going Concern

The National Executive Council has considered the future performance of the Union and its ability to continue as a going concern. It has considered severe but plausible downside sensitivity scenarios, including the potential impact of the outbreak of Coronavirus (COVID-19) on the operational and financial performance of the Union. As part of this analysis, management has considered mitigating actions within their control should these scenarios occur around liquidating funds from fixed asset investments and other measures to protect cash balances. These forecasted cash flows, considering the ability and intention of the National Executive Council to implement mitigating actions should they need to, provide sufficient headroom in the forecast period.

The National Executive Council is therefore satisfied that, for the foreseeable future, the Union can meet its projected expenditure and working capital requirements. The Union currently enjoys a stable membership base and holds sufficient cash and liquid assets to draw upon. Consequently, the financial statements have been prepared on a going concern basis.

General Revenue Account

All monies received on behalf of the Union in respect of contributions, donations or otherwise, form one central Fund (the General Revenue Account) for general purposes and a separate Fund for political purposes.

Branch Revenue Account

In accordance with the Union's Rule Book, each branch is allocated a proportion of the industrial contributions paid by the members of that branch to provide a fund (the Branch Revenue Account) from which to meet the expenses incurred in connection with the work of the branch.

Federation Funds

In accordance with the Union's Rule Book, branches may form Federations. Federation funds are drawn from annual affiliation fees levied upon participating branches and from grants made from the General Revenue Account at the discretion of the National Executive Council.

Political Funds

The objects of the Union include the furtherance of political objects. Monies received on behalf of the Political Fund are credited directly to the Fund. Any payments in respect of such objects are made directly out of the Political Fund.

Political Funds Account No.2

In accordance with the Union's Rule Book, the Political Fund of the Union is divided into two accounts, Account No.1 and Account No.2, the latter of which is created by the allocation of the amount prescribed by the Rule Book from the political contribution paid by the political members of each branch.

Regional Recruitment Fund

The objects of the Union include the recruitment of new members in each of the Union's seven Regions. A fund for this purpose is comprised of donations made voluntarily by Branches.

Union Learning Fund

The objects of the Union include the provision of learning facilities for members to bridge skills gaps. Grants are received from the Department for Education in respect of expenditure on this fund.

Members' Contributions

Members' contributions are accounted for on an accruals basis and recognised in the period in which they are due.

Investment and Other Income

All investment and other income is credited to the relevant fund when receivable.

Legal Costs

The Union is at any time involved in numerous legal cases on behalf of its members. There is an inherent risk that substantial costs and disbursements could be incurred on any case. Legal costs and disbursements are charged to the financial statements as incurred, together with an estimate for additional costs or recoveries which they reasonably believe may occur in the following or subsequent years.

Corporation Tax

Taxation for the year is chargeable on investment income, capital gains and other non-trading taxable income, less provident benefits, and on any trading profits. There is no charge for the year as provident benefits exceed the investment income and capital gains, and there are no profitable trading activities.

Deferred Tax

Deferred tax is recognised in respect of all timing differences, which are differences between the taxable profits and total comprehensive income that arises from the inclusion of income and expenses in tax assessments in periods different from those in which they are recognised in the financial statements. The Union has adopted a reinvestment policy whereby all realised proceeds on the disposal of investments are reinvested into other chargeable assets, thereby eliminating any current tax liability and thereby the need for the recognition of a deferred tax liability. Where the proceeds are not fully invested no current tax liability is considered likely to arise due to expenditure on provident benefits exceeding any chargeable gains that might arise.

Tangible Fixed Assets

Fixed assets are stated at cost less accumulated depreciation.

Depreciation is provided on all tangible fixed assets, except freehold land, to write off the cost less estimated residual value in equal annual instalments over the estimated useful economic lives of the assets as follows:

Freehold Land	Nil
Buildings	5%
Fixtures and Fittings	20%
Motor Vehicles	25%
Computer Equipment	33.3%

Gains and losses on disposals are determined by comparing the proceeds with the carrying amount and are recognised in the Statement of Comprehensive Income. The assets' residual values, useful lives and depreciation methods are reviewed, and adjusted prospectively if appropriate, or if there is an indication of a significant change since the last reporting date. Assets are reviewed for impairment whenever events or changes in circumstances, such as planned disposal of properties, indicate that the carrying amount may not be recoverable.

Fixed Asset Investments

Quoted investments are stated at fair value, which is determined by reference to the quoted market price at the year end date.

Unquoted investments are held at either original cost or current value as determined by either an independent third party or the latest external transaction price as approved by the board of the bank (Unity Trust Bank).

The Statement of Comprehensive Income includes the net gains and losses arising on the revaluation and disposals throughout the year.

The Union does not acquire put options, derivatives or other complex financial instruments. The main form of financial risk faced by the Union is that of volatility in equity markets and investment markets due to wider economic conditions, the attitude of investors to investment risk, and changes in sentiment concerning equities and within particular sectors or sub sectors.

Post-Retirement Benefits

The Union operates a staff superannuation scheme providing benefits based on final pensionable pay. The assets of the scheme are held separately from those of the Union.

Pension scheme assets are measured using market values. Pension scheme liabilities are measured using the projected unit method and discounted at the current rate of return on a high quality corporate bond of equivalent term and currency to the liability. The net interest element is determined by multiplying the net defined benefit liability by the discount rate, at the start of the period taking into account any changes in the net defined benefit liability during the period as a result of contribution and benefit payments. The net interest is recognised in the income and expenditure accounts as a total of the net pension scheme expenditure.

Remeasurements, comprising actuarial gains and losses and the return on the net defined benefit liability (excluding amounts included in the net interest) are recognised immediately in other comprehensive income in the period in which they occur. Remeasurements are not reclassified to income and expenditure in subsequent periods.

The pension scheme deficit is recognised in full. The movement in the deficit is split between operating charges, finance items and actuarial gains and losses in the statement of other comprehensive income.

Contributions to the Union's defined contribution pension scheme are charged to profit or loss in the year in which they become payable.

Unpaid Pension Contributions

Any unpaid contributions to the scheme which are payable as at the balance sheet date are recognised as a creditor due within one year.

Financial Instruments

The Union only enters into basic financial instrument transactions that result in the recognition of financial assets and liabilities like other debtors and creditors.

Debt instruments that are payable or receivable within one year, typically other creditors or debtors, are measured, initially and subsequently, at the undiscounted amount of the cash or other consideration expected to be paid or received.

Financial assets that are measured at cost are assessed at the end of each reporting period for objective evidence of impairment. If objective evidence of impairment is found, an impairment loss is recognised within the operating surplus or loss. The impairment loss is measured as the difference between the asset's carrying amount and the present value of estimated cash flows discounted at the asset's original effective interest rate. If such a financial instrument has a variable interest rate, the discount rate for measuring any impairment loss is the current effective interest rate determined under the contract.

Cash and Cash Equivalents

Cash and cash equivalents include cash in hand, deposits held on call with banks, other short-term investments with original maturities of three months or less, and bank overdrafts. This excludes cash held as part of the Union's investment portfolios which is included within fixed asset investments.

Leases

Operating lease rentals are charged to the Statement of Comprehensive Income in equal instalments over the period of the lease.

Critical Accounting Assumptions and Judgements

The preparation of financial statements requires management to make judgements, estimates and assumptions in the application of accounting policies that affect the reported amounts of assets, liabilities, income and expenses. Actual results may differ from these estimates. Estimates and judgements are continuously evaluated and are based on historical experience and other factors including expectations of future events that are believed to be reasonable. Revision to accounting estimates are recognised in the period in which the estimates are revised, and any future period affected.

The main areas where judgements and estimates may have a significant effect on the amounts included in the financial statements are:

Deferred tax - Under HMRC rules affecting the taxation of trade unions, a corporation tax liability does not arise on chargeable gains arising from the disposal of properties and investments where such gains are reinvested into other chargeable assets in the same accounting period. Where the proceeds are not fully reinvested, no corporation tax liability is considered likely to arise due to the availability of sufficient excess expenditure on provident benefits. Accordingly, in the opinion of the management, the revaluation of investments does not give rise to a timing difference and to deferred tax liabilities.

Defined benefit pension scheme - the cost of each of the defined benefit pension schemes is determined using an actuarial valuation. The actuarial valuation involves making assumptions about discount rates, future salary increases, mortality rates and future pension increases. Due to the complexity of the valuation, the underlying assumptions and the long term nature of these plans, such estimates are subject to significant uncertainty. In determining what rates to use the Union sought additional advice from experienced advisors who liaised with its actuaries to advise on appropriate estimates to use. For example, with regard to the discount rate, management considers the interest rates of corporate bonds in the respective currency with at least AA rating, with extrapolated maturities corresponding to the expected duration of the defined benefit obligation. The underlying bonds are further reviewed for quality, and those having excessive credit spreads are removed from the population bonds on which the discount rate is based, on the basis that they do not represent high quality bonds. The mortality rate is based on publicly available mortality tables for the specific country. Future salary increases and pension increases are based on expected future inflation rates. Any changes in any of the above estimates could have a significant impact on the surplus or deficit of the Scheme managed by the Union.

Listed investments and Unity Trust Bank Plc - the basis of calculation and assumption used for market value. The valuation of listed investments has been provided by the investment management company. The value of the Unity Trust Bank shares is based on the latest market value paid for additional shares in the period.

Tangible assets - the basis of calculation and assumption used to perform revaluation and useful economic life of assets used in calculating depreciation. The Union reviews non-current assets each year for impairment, in line with accounting standards.

Notes to the Financial Statements for the Year Ended 31 December 2023

	2023 £ 000s	2022 £ 000s
1 – Membership Contributions		
Industrial		
General	35,133	32,699
Branch	3,740	3,437
	-----	-----
Total Industrial	38,873	36,136
Political.....	1,522	1,571
	-----	-----
	40,395	37,707
	=====	=====
2 – Other Income		
Arena/Network Sales and Advertising	204	186
Affinity Partners Commission.....	133	127
Grant Income from Department for Education.....	--	193
Other Branch Income.....	121	98
	-----	-----
	458	604
	=====	=====
3 – Benefits		
Sickness.....	266	276
Maternity/Paternity	40	38
Death	368	374
Disablement and Distress Grant.....	13	21
Convalescent Homes	3	1
Dispute.....	--	1
	-----	-----
	690	711
	=====	=====
4 – Political Expenditure		
National/Regional Labour Party Affiliation Fees.....	883	942
Labour Party Donation.....	125	42
Conferences/Meetings.....	302	226
Elections	3	1
Affiliation Fees	90	62
Other Expenses	42	30
	-----	-----
	1,445	1,303
	=====	=====
5 – Legal Costs		
Solicitors Costs.....	348	75
Legal Disbursements.....	41	156
	-----	-----
	389	231
	=====	=====

Notes to the Statements for the Year Ended 31 December 2023

	2023	2022
	£	£
	000s	000s
6 – Personnel Costs		
Salaries	14,001	13,389
Employer's National Insurance	1,560	1,549
Cost of Defined Benefit Scheme (see note 16)	3,143	5,773
Cost of Defined Contribution Scheme	86	--
Taxable Emoluments	297	259
Other Personnel Costs	1,981	1,707
	-----	-----
	21,068	22,677
	=====	=====

The Union operates a defined contribution pension scheme. The assets of the scheme are held separately from those of the Union in an independently administered fund. The pension charge represents contributions payable by the Union to the fund. Contributions amounting to £nil (2022: £nil) were payable to the fund at year end and are included in creditors.

7 – Other Operating Expenses	2023	2022
	£	£
	000s	000s
7a – Administration and Office Costs		
Office Accommodation Costs	2,376	2,006
Depreciation	2,161	2,070
Profit on Sale of Motor Vehicles	(256)	(34)
Audit Fees	121	69
Professional Fees	529	587
Computer Expenses	1,193	848
Post and Carriage	246	195
Office Relocation	7	133
Ballot Expenses	307	82
Other Administration Costs	972	862
Other Expenses	(908)	(204)
	-----	-----
	6,748	6,614
	=====	=====
7b – Conference and Executive Expenses		
Annual Delegate Meeting	443	420
President and National Executive Council	114	99
Regional Council	57	52
Regional Conferences	169	105
TUC Conferences	193	196
Other Conferences	242	185
	-----	-----
	1,218	1,057
	=====	=====
7c – Affiliation Fees		
British TUC	1,071	1,109
Irish Congress of Trade Unions	52	55
Scottish TUC	76	76
Welsh TUC	--	6
International Affiliations	31	102
Other Affiliations	58	58
	-----	-----
	1,288	1,406
	=====	=====

Notes to the Statements for the Year Ended 31 December 2023

	2023	2022
	£	£
	000s	000s
7d – Travel Expenses		
Motor Cars.....	465	220
Travel and Meetings.....	306	255
	-----	-----
	771	475
	=====	=====
7e – Campaigns and Communications		
Journal Costs.....	333	489
Campaign Costs	272	150
	-----	-----
	605	639
	=====	=====
7f – Education and Training Costs		
Union Learning Costs.....	--	193
Training Courses	88	96
Summer Schools.....	98	84
Other Education and Training Costs	13	11
	-----	-----
	199	384
	=====	=====
7g – Recruitment and Development Costs		
Academy.....	437	877
Stand Down.....	519	1,009
Other Recruitment and Development Costs	66	(1,008)
Regional Recruitment Fund	63	47
	-----	-----
	1,085	925
	=====	=====
7h – Branch and Federation Expenditure		
Branch Admin Costs	1,324	861
Branch Education & Training Costs.....	851	538
Branch Meeting and Conference Costs	771	592
Branch Recruitment and Development Costs	1	1
Federation Expenditure.....	53	58
	-----	-----
	3,000	2,050
	=====	=====
Total Other Operating Expenses	14,914	13,550
	=====	=====
Allocated to:		
General Revenue Account.....	11,851	11,453
Branch Revenue Account.....	2,947	1,992
Federation Funds Accounts	53	58
Regional Recruitment Fund	63	47
	-----	-----
	14,914	13,550
	=====	=====

Notes to the Statements for the Year Ended 31 December 2023

	2023	2022
	£	£
	000s	000s
8 – Investment Income		
Income from Pooled Investment Vehicles.....	1,821	444
Change in Market Value.....	3,923	273
	-----	-----
	5,744	717
	=====	=====
9 – Net Interest on Defined Benefit Pension Liability		
Interest Income on Pension Scheme Assets.....	6,339	3,711
Interest Expense on Defined Benefit Obligation.....	(6,902)	(4,474)
	-----	-----
	(563)	(763)
	=====	=====

10 – Taxation

Current Tax

The Union is subject to UK corporation tax on its results. In the year to 31 December 2023, there were sufficient provident benefits available to reduce the annual charge to £nil (2022: £nil).

Deferred Tax

The Union is also aware that additional corporation tax could be due if it were to dispose of all of the assets in its investment portfolio in any one particular year. However, as at 31 December 2023 there were sufficient provident benefits available to mitigate any potential tax due, hence no provision has been made in the year to 31 December 2023 for deferred tax.

	Land and Buildings	Fixtures and Fittings	Motor Vehicles	Computer Equipment	Total
	£	£	£	£	£
	000s	000s	000s	000s	000s
11 – Fixed Assets					
Cost					
At 1 January 2023.....	28,398	3,105	2,623	386	34,512
Additions.....	1,545	420	(218)	--	1,747
Disposals.....	--	--	(244)	--	(244)
	-----	-----	-----	-----	-----
At 31 December 2023.....	29,943	3,525	2,161	386	36,015
	=====	=====	=====	=====	=====
Depreciation					
At 1 January 2023.....	14,259	647	1,823	301	17,030
Charge for the Year.....	1,047	626	415	73	2,161
Disposals.....	--	--	(500)	--	(500)
	-----	-----	-----	-----	-----
At 31 December 2023.....	15,306	1,273	1,738	374	18,691
	=====	=====	=====	=====	=====
Net Book Value					
At 31 December 2023.....	14,637	2,252	423	12	17,324
	=====	=====	=====	=====	=====
At 31 December 2022.....	14,139	2,458	800	85	17,482
	=====	=====	=====	=====	=====

Notes to the Statements for the Year Ended 31 December 2023

	Market Value b/fwd at 01/01/23 £ 000s	Purchases £ 000s	Disposal Proceeds £ 000s	Change in Market Value £ 000s	Market Value c/fwd at 31/12/23 £ 000s
12 – Investments					
ASI Multi-Asset Distribution Fund	1,833	--	(1,862)	29	—
ASI Multi-Manager Diversity Fund	6,519	28	—	343	6,890
Partners Group Multi-Asset Credit Funds	25,316	--	(2,142)	864	24,038
M&G Alpha Opportunities Fund	9,910	476	—	522	10,908
Apollo Total Return Fund	12,974	—	—	1,085	14,059
IFSL Trade Union Unit Trust TU Income	—	14,027	—	445	14,472
Black Rock ICS Sterling Liquidity Heritage Fund	20,048	--	(14,200)	635	6,483
	-----	-----	-----	-----	-----
Total Pooled Investment Vehicles	76,600	14,531	(18,204)	3,923	76,850
Unquoted Equities	8,098	—	—	—	8,098
	-----	-----	-----	-----	-----
Total Investments	84,698	14,531	(18,204)	3,923	84,948
	=====	=====	=====	=====	=====
	Market Value b/fwd at 01/01/22 £ 000s	Purchases £ 000s	Disposal Proceeds £ 000s	Change in Market Value £ 000s	Market Value c/fwd at 31/12/22 £ 000s
ASI Multi-Asset Distribution Fund	2,028	--	—	(195)	1,833
ASI Multi-Manager Diversity Fund	7,229	41	—	(751)	6,519
Partners Group Multi-Asset Credit Funds	18,668	6,497	(297)	448	25,316
M&G Alpha Opportunities Fund	9,968	102	—	(160)	9,910
Apollo Total Return Fund	13,358	--	—	(384)	12,974
Black Rock ICS Sterling Liquidity Heritage Fund	25,177	--	(5,400)	271	20,048
	-----	-----	-----	-----	-----
Total Pooled Investment Vehicles	76,428	6,640	(5,697)	(771)	76,600
Unquoted Equities	7,054	—	—	1,044	8,098
	-----	-----	-----	-----	-----
Total Investments	83,482	6,640	(5,697)	273	84,698
	=====	=====	=====	=====	=====
13 – Debtors				2023 £ 000s	2022 £ 000s
Contribution Debtors				2,626	2,516
Other Debtors				743	197
Prepayments				40	51
Consumables				196	169
				-----	-----
				3,605	2,933
				=====	=====

Notes to the Statements for the Year Ended 31 December 2023

	2023	2022
	£	£
	000s	000s
14 – Cash at Bank		
Bank Balances	4,134	2,500
	-----	-----
	4,134	2,500
	=====	=====
By Fund:		
General Funds	4,072	2,455
Net Branch Funds	--	(17)
Federation Funds	62	62
	-----	-----
	4,134	2,500
	=====	=====
15 – Creditors		
Trade Creditors	831	825
Other Taxes and Social Security	403	414
Accruals	144	211
Other Creditors	652	791
	-----	-----
	2,030	2,241
	=====	=====

16 – Pension Costs

Employees of the Union who are 18 years old and over are eligible to join the Usdaw Staff Superannuation Fund. As at 31 December 2023 the scheme had 381 (2022: 343) active members, was paying pensions to 422 (2022: 480) retired members and recognised additional future pension commitments in respect of 145 (2022: 150) deferred pensioners. This is a funded pension scheme providing benefits paid on final pensionable pay. The assets of the scheme are held separately from those of the Union.

The results of the latest funding valuation at 31 December 2020 have been adjusted to the new balance sheet date, taking account of experience over the period since 31 December 2020, changes in market conditions, and differences in the financial and demographic assumptions. The major assumptions used by the actuary were:

	2023	2022
Discount Rate	4.5%	4.8%
RPI Inflation	2.9%	3.1%
CPI Inflation	2.5%	2.5%
Rate of General Long-Term Increase in Salaries	2.9%	3.1%
Increases to Pensions and Deferred Pensions:		
- Option A Members	5.0%	5.0%
- Option B Members (pension accrued before 6 April 2007)	2.5%	2.4%
- Option B Members (pension accrued after 6 April 2007)	1.8%	1.8%

The assumptions used by the actuary are the best estimates chosen from a range of possible actuarial assumptions which, due to the timescale covered, may not necessarily be borne out in practice.

For the year ending 31 December 2023 the mortality assumption is 100% of S3PxA tables with improvements in line with CMI 2022 projections with smoothing factor (Sk) of 7.0 and long-term rate of improvement of 1.0% per annum. The mortality assumptions are consistent with the 2020 valuation assumptions allowed for updated expected future improvements in mortality rates.

For the year ending 31 December 2022 the mortality assumption is 104% of S3PxA tables with improvements in line with CMI 2021 projections with smoothing factor (Sk) of 7.0 and long-term rate of improvement of 1.0% per annum. The mortality assumptions are consistent with the 2020 valuation assumptions uplifted by 4% to allow for the future expected impact of COVID-19 and they allow for updated expected future improvements in mortality rates.

Notes to the Statements for the Year Ended 31 December 2023

Scheme Assets

The fair value of the scheme's assets, which are not intended to be realised in the short-term and may be subject to significant change before they are realised and the present value of the scheme's liabilities, which are derived from cash flow projections over long periods and thus are inherently uncertain, were:

	2023	2022
	£	£
	000s	000s
Diversified Growth Fund.....	16,826	19,317
Equities.....	23,086	26,770
Property.....	14,102	14,862
Liability Driven Investments.....	--	29,428
Corporate Bonds.....	23,383	--
Absolute Return Bonds.....	--	16,431
Credit.....	28,805	23,915
Other.....	31,752	1,828
Total Assets.....	137,954	132,551
Present Value of Liabilities.....	(158,692)	(148,048)
Net Pension Liability.....	(20,738)	(15,497)

Analysis of Amount Charged to Operating Surplus

	2023	2022
	£	£
	000s	000s
Current Service Cost		
Admin Expenses.....	2,913	5,577
Grant Income from Department for Education.....	161	101
Total Operating Charge.....	3,074	5,678

Analysis of Amount Recognised in Other Comprehensive Income

	2023	2022
	£	£
	000s	000s
Asset Loss During the Year.....	(568)	(56,545)
Changes in Assumptions Underlying the Present Value of the Scheme Liabilities.....	(9,592)	82,021
Total Amounts Charged to Other Comprehensive Income.....	(10,160)	25,476

Changes in the Present Value of the Defined Benefit Obligations are as follows:

	2023	2022
	£	£
	000s	000s
Opening Defined Benefit Obligation.....	148,048	227,200
Service Cost.....	2,913	5,577
Interest Cost.....	6,902	4,474
Actuarial Loss/(Gain).....	9,592	(82,021)
Contributions by Scheme Members.....	4	9
Benefits Paid.....	(8,767)	(7,191)
Closing Defined Benefit Obligation.....	158,692	148,048

Notes to the Statements for the Year Ended 31 December 2023

Changes in the Fair Value of Scheme Assets are as follows:

	2023	2022
	£	£
	000s	000s
Opening Fair Value of Scheme Assets	132,551	185,618
Interest Income on Assets.....	6,339	3,711
Loss on Assets.....	(568)	(56,545)
Contributions by Employer.....	8,556	7,050
Contributions by Scheme Members.....	4	9
Benefits Paid.....	(8,767)	(7,191)
Admin Expenses	(161)	(101)
	-----	-----
Closing Fair Value of Scheme Assets	137,954	132,551
	=====	=====

The Union is expected to make an additional contribution of £3.289 million (2022: £3.193 million) to its defined benefit pension scheme next year.

17 — Key Management Personnel

Key management personnel comprises the Central Officials, Regional Officers, National Officers and Central Office Department Heads. The total remuneration cost for these roles paid in the year was £2,412k (2022:£2,287k) which includes gross salaries, employer's pension contributions and Benefits in Kind.

18 — Operating Leases

At 31 December 2023 the Union's future minimum lease payments under non-cancellable operating leases are as follows:

	Land and Buildings	
	2023	2022
	£	£
	000s	000s
Expiry Date:		
Within one year.....	231	231
Between two and five years	741	741
Over five years	15	15
	-----	-----
	987	987
	=====	=====

Due to the Union operating a partial exemption VAT scheme, whereby they cannot reclaim all their VAT, the above figures are shown inclusive of VAT.

19 — Capital Commitments

At 31 December 2023, the Union had capital commitments totalling £nil (2022: £nil).

20 — Contingent Liabilities

At 31 December 2023, the Union had capital commitments totalling £nil (2022: £nil).



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Usdaw Union



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