Standard form for the Section 9 cooperation dialogue

**Cooperation dialogue between manager and union representative**

The dialogue is conducted pursuant to an agreement between the Danish Employers’ Association for the Financial Sector (FA) and the Financial Services Union in Denmark (Finansforbundet) concerning trade union duties, Section 9. Unless otherwise specified, section references refer to the Agreement on Union Work, starting from page 117 in STOK 2017.

The dialogue is held once a year. For newly elected union representatives, the first dialogue must take place no later than three months after the union representative is elected. Whenever there is a change of manager, a new dialogue must take place no later than three months after the new manager takes up his/her duties.

Date for the dialogue:

Manager:

Union representative:

Department:

**Agenda**

1. **Cooperative relations and mutual expectations**

What is the goal of our cooperation in the next period, e.g.:

* How can we be at the forefront of situations/problems to ensure that they are resolved in a positive, constructive manner? (Section 2, subsections 2–3, as well as Appendix 1: Function description (p. 129)).
* How is the union representative’s role as a liaison between employees and management ensured? (Section 2, subsections 5–6)
* How do we help one another in the best possible way?

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What are our mutual expectations of one another, what aspect of our cooperation do we appreciate in the other party and what would we like to see more of?

* How do we experience confidentiality and trust in our cooperation?

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Means for achieving our goals:

* How often should we meet (manager and union representative)? (Section 2, subsection 4)
* What information do we share (e.g. payroll costs and other accounting figures in the union representative’s area, timebank balances, amount of sick leave, staff influx/outflow, wage statistics, job-satisfaction results, and the like)? (Section 2, subsection 2)
* Who provides information to whom – and how can we help one another (e.g. to implement new collective (OK)/local agreement, organisational change/HR/staff news, news from the constituency/Finansforbundet, etc.)? (Section 2, subsection 2)
* Confidentiality and loyalty (confidentiality dilemma in relation to members and management. The union representative’s duty of loyalty vis-à-vis member(s)).

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How has the cooperation between manager/management team and the union representative functioned since the last cooperation dialogue – and what would it take to possibly improve it?

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1. **Practice and agreements**

Which procedures do we have in place for cases/matters – such as job dissatisfaction, cautions and dismissals – and when must the union representative and/or senior union representative be informed or involved? (Section 2, subsection 2, and Section 3)

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Are there any situations where it would be expedient to enter into written agreements?

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What duties and rights does the union representative have? (Section 15)

- e.g. the right to be informed of organisational initiatives and changes before they are implemented, as well as factors affecting employees’ conditions (Section 2, subsections 2–3)

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1. **Tasks of the union representative**

For example:

* Duty to promote and maintain calm and good working conditions.
* Engender mutual relationships of trust
* Mutual obligation to keep one another informed
* Negotiation on behalf of the members
* Deal with conflicts in the department
* Make sure that legislation, collective agreements and agreements are complied with
* Represent the constituency and thus the Financial Services Union
* Visible to all members in the union representative’s area – regardless of geographical location
* Recruit new members

(Note: the list is not exhaustive)

Expected time spent on union-rep duties, both in relation to own activities, constituency and the Financial Services Union? (Section 14, subsection 1, and possibly Section 14, subsection 2)

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Is there a need to adjust the union representative’s other tasks, including adapting the scope, requirements and any targets of daily tasks/customer portfolio and goals? (Section 14, subsections 1–2)

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1. **Information between the union representative and the members**

How and when are members informed (e.g. set aside time at morning meetings/department meetings)?

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1. **Union representative training course** (Section 4, subsections 1–2, and possibly Section 4, subsection 5)

Newly-elected union representatives who have not previously completed the basic training course will generally be entitled to time off with pay to complete the basic training course within the first two years.

After this, the union representative is entitled to updating/supplementary course activities/training.

The following has been implemented since the last cooperation dialogue:

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| Date: | Themed days/course: |
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In the year ahead, the following is requested to be implemented:

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| Date: | Themed days/course: |
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1. **Conclusion**

Is there anything that you as a manager/union representative would like to talk about, which has not emerged already?

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The next dialogue will be held before: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: Date:

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Signature, manager Signature, union representative

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| The Senior Union Representative will be notified of the date of this dialogue. It is agreed that the minutes/filled-in dialogue form will be enclosed at the same time.   * Yes * No |