

Part A: Report

On several occasions in the years before the current RPSP union campaign, Research Data Analysts, Bioinformatics Programmers, and other titles independently reached out to UPTE for guidance and help with forming a union for their job titles. UPTE declined to help any of these workers form a union or accrete them into the current bargaining units. In 2022, workers reached out to UAW, who helped us begin the process of forming the RPSP union. We have been organizing with UAW assistance and support since then.

In Fall 2024, members of the RPSP Statewide Organizing Committee, who had been organizing with UAW for several years, were approached by reps from UPTE about the possibility of joining their union. The OC wanted to take the question of affiliation seriously and with due diligence by carefully considering both unions. The Statewide OC nominated representatives from each campus to serve on an Affiliation Sub-Committee to work on this issue further.

The Affiliation Sub-Committee met several times in Fall 2024 and achieved two key goals. First, we compiled some basic facts about each union. Next, we agreed on a list of questions to ask each union in an “interview-style” meeting.

We also considered the option of forming an independent union i.e., not affiliating with any state/national union. The main advantages of an independent union would be more local control over monetary and legal resources. The flip side of this is that these resources would be much more limited in scale and thus there would be significantly more effort required to form an independent union without the resources of a larger union, especially given how far along we are in the process of forming our union. Ultimately, after discussion, we decided against forming an independent union despite the advantages.

On January 6th 2025, members of the Affiliation Sub-Committee (representing Berkeley, Davis, Los Angeles, San Diego, and San Francisco, as well as job titles including Research Administrators, Project Policy Analysts, Bioinformatics Programmers, Research Data Analysts, R&D Engineers and others) met with leadership from UPTE and UAW for an hour each. During this hour, we asked questions about organizing philosophy, strategy, resources, and more. We also asked each team to submit written answers to a litany of questions, which we received shortly before each meeting and can be read in subsequent sections of this report.

A major theme from our conversation with UPTE leadership is that since Dan Russell was elected president when he ran on a reformist slate 3 years ago, UPTE has been focused on building up workers as leaders within the union. This is in contrast to a more “service-model”,

top-down union structure that UPTE had deployed for many years before this new change in leadership.

Some of the main arguments that UPTE made include: 1. Their contract has the strongest pension plan and it's unlikely that UC will give that to anyone else; 2. Accretion means that we would immediately be covered by a contract. 3. They already represent research (and possibly public service) titles, and affiliating with UAW would mean that similar titles are spread across multiple unions, weakening both. On this last point, UAW pointed out that this will be the case regardless of what choice we make. UAW also represents thousands of research and public service employees at UC, and Teamsters do as well.

UPTE's arguments for their stated strategy for unionizing RPSP employees through accretion are two-fold: 1) they claim it is a faster process than forming a new union; and 2) that workers would immediately gain benefits that other workers in the union had previously bargained for. They also state this is simply correcting for UC having moved staff into non-represented titles, who should have always been in UPTE to start with. This may be true, and the same may apply to UAW for some titles.

However, the accretion strategy has many drawbacks. One of these drawbacks is that accreted RPSPs would have no say over bargaining issues for our initial contract, as they would be immediately covered by an existing contract. Another is that, while UPTE claims accretion is faster, there have historically been cases where the accretion process for certain job titles has taken months or years due to pushback from UC or PERB. Additionally, due to the number and diversity of job titles within RPSP, it is all but certain that we would not all be accreted into UPTE within weeks or even months. When asked, UPTE would not provide which titles they would accrete first, and which ones would have to wait (and for how long), though we know that many R&D Engineers at UCSD have been approached by UPTE organizers.

During our conversation with UAW, their responses represented UAW's longer and arguably stronger history of both worker empowerment and building a strong labor movement as a whole. They also spoke about UAW's political organizing and advocacy on the local, state, and federal level, and the role members play in that work. For example, UAW 4811 members at Berkeley were recently instrumental in writing, campaigning for, and passing a law to strengthen tenants' rights and ability to organize in Berkeley.

Both UAW and UPTE leadership were asked directly if they would respect our democratic decision on affiliation if RPSPs decided to affiliate with the other union. Unfortunately, UPTE did not clearly answer this question. Dan Russell said that their union has an obligation to strengthen the union for their currently represented members and would continue to engage

with RPSPs over joining UPTE. UAW more clearly stated that they would respect our decision and even assist us in the process, even if we chose to affiliate with UPTE.

After these discussions with UPTE and UAW leadership, as well as internal discussion among the RPSP Affiliation subcommittee, members of the subcommittee brought our findings back to campus committees to discuss further.

On January 16th, UPTE sent an email to R&D Engineers 1-3 announcing that, over the holiday break, PERB had ruled that Research & Development Engineers 1-3 should be represented by UPTE's Technical (TX) bargaining unit. UPTE organizing staff spoke with members of the RPSP OC and divulged that UPTE is planning on accreting R&D Engineers 4&5 next, though the specifics on how and when this will be achieved are not clear.

At our statewide OC meeting on January 27th, all RPSPs in attendance voted unanimously to continue organizing with UAW. This was after weeks of discussion among the statewide OC, campus OCs, and as many other workers as possible.

On January 28th, RPSPs met with UPTE again to discuss the UPTE accretion of R&DEs and next steps. We asked them to walk us through the timeline and they confirmed that they knew about the PERB decision before meeting with us on 1/6/25 but declined to tell RPSPs (including some R&DEs) on the call about the petition filing and decision. We pressed them on this lack of transparency and the general strategy of accretion without talking to workers. RPSPs on the call also notified them of our unanimous decision from 1/27.

Part B: UAW Answers to Questionnaire

UAW Personnel:

Rafael Jaime, UAW Local 4811 President

Mike Miller, UAW Region 6 Director

Chris Mullarkey, SSAP Organizer

Organizing Strategies and Philosophy

1. What were the strategies you deployed for organizing the existing bargaining unit?

Our strategic approach to organizing is one that builds power through member-led, 1-1 organizing; large, inclusive units for greater union density in the workplace; and centering the “life cycle of the academic worker.” These approaches not only help ensure success in the initial recognition of a union, but also ensure workers continue to have power through the bargaining process and beyond. It is only when a majority of workers in a workplace are engaged and mobilized that they can move the employer to agree to their demands. Workers themselves must be the ones organizing each other through 1-1 conversations in order to build the strong majority necessary to win.

At UC and in other institutions, UAW has used the “lifecycle of the academic worker” in order to organize new workers and build union density in the workplace and the entire sector, giving workers more power. At UC, graduate student workers were the first to unionize, then postdoctoral scholars, then Academic Researchers, then Student Researchers, and then Student Services Advising Professionals. Each of these units represents a subsequent stage in the lifecycle of an academic worker at UC. As workers move through each of these stages, they bring with them the knowledge of what it’s like to have a union and, in many cases, even the skills for organizing.

2. What is your philosophy for organizing?

Our philosophy is that union campaigns will only be successful if workers have power to achieve what they deserve at the bargaining table. This power stems from a strong majority of the workforce being engaged and mobilized to move the employer to agree to their demands. In our campaigns we work to ensure that a diverse, broad group of

workers in every part of the bargaining unit (from every job title, campus, work type, and identity) play key leadership roles and are actively involved in the organizing and bargaining process, and that workers have good access to information, and the knowledge and initiative to make informed strategic decisions based on what workers want and how the employer responds. This worker-led approach has led to more than 60,000 higher education workers winning representation with UAW nationwide since 2021.

3. What's your experience with organizing a bargaining unit that includes a wide variety of job titles?

At UC and many other institutions, UAW has a strong track record of organizing large, inclusive units because this helps ensure greater density and power in the workplace. At UC, UAW 4811 covers over 60 job titles across its three bargaining units. The SSAPs campaign, which recently reached majority and filed for recognition, covers 15 job titles. Organizing bargaining units with a wide variety of job titles certainly has its challenges, but the main thing is to make sure this is a member-led campaign, meaning that workers in particular job titles are organizing their own co-workers.

4. Tell us about one recent organizing effort you were a part of that failed. Why do you think it failed?

One failed organizing drive in the recent past took place at the University of Minnesota, where our campaign lost in a representation election after the workforce had expressed early support for unionization. However, when the employer initiated an anti-union campaign, a population of workers who had initially been supportive changed their position, and the vote failed. The organizing committee - who were a fantastic group of individuals and highly committed to unionization - were nonetheless representative of only a small number of departments and job titles. As such, the employer was able to target those departments with less worker activity, disseminating misleading information that "the union" was only carrying out the agenda of workers from certain departments. Enough workers in departments with no active participants to correct this misinformation were persuaded.

After this campaign we reviewed the events that led up to these practices and further refined the worker-led model that characterizes UAW organizing. In higher education since that setback in 2012, workers have won an impressive 95% of their campaigns.

5. What are the benefits and drawbacks of accretion vs. ground organizing?

For us, it's not really a question of accretion vs. ground organizing. Whatever the legal strategy employed, it must be backed by worker-led organizing from beginning to end.

An organizing-focused, member-led approach to unionizing ensures that the process is not only democratic but also ensures that it builds power. To win a strong contract that serves the needs of workers, workers must be ready to fight and move the boss to agree to their terms. This can only happen if workers are organizing.

In 2022, Teaching Assistants at UCSF decided they wanted to join UAW. We could have easily filed an accretion petition without talking to any workers, but we knew this would not build power. Workers needed to be prepared to fight for a contract, so workers gathered a supermajority of cards in support of joining UAW before filing an accretion petition. The cards weren't necessary in the accretion process, but the committee nonetheless chose to do this because it would help them build structure and power. This was also the same approach project scientists at LBL used to win a union and a strong contract in 2023.

Resources and Support

1. What specific resources, both financial and human (e.g., staff, organizers, volunteers), will you commit to spending on the organizing and card drive efforts in 2025? How will these resources be allocated to ensure success?

UAW is willing to commit whatever resources are necessary to win. Resources are allocated geographically and chronologically in a way that ensures success based on the size and needs of the campaign. Some of the support we provide in new organizing campaigns includes: organizing staff that trains and supports member leaders to build a worker-led union; bargaining support to ensure that the democratically-elected bargaining team is trained and equipped to negotiate a strong contract; political support built on pre-existing relationships with electeds to move all phases of the campaign; communications support to ensure that the workers can express their campaign effectively to each other, the employer, electeds, and the public; data support so workers can organize information about who has been contacted and what their responses have been; and legal support to navigate the certification process, address possible unfair labor practices, and any other legal questions that arise. The vast majority of UAW staff first got involved as member leaders in their local union and bring this experience to bear on their role. In addition to staff resources, UAW is the largest union at the University of California with 50k+ workers and we have thousands of active members who are eager to share their experiences with new organizers. Members of

UAW 4811 and other new organizing campaigns frequently meet at panels, regional conferences, and socials to exchange ideas and best practices for winning transformative contracts. UAW has been organizing at the University of California for nearly four decades, so we have vast knowledge about the system and how to win when negotiating with UC.

2. What are the staff resources you can provide for organizing, disputes, and bargaining?

See above for details about the support UAW provides.

3. Would members have direct access to an attorney throughout each year (e.g., for disputes or questions)?

By forming a union and winning a collectively bargained agreement, workers attain equal standing with the university to resolve disputes, rather than having to go through lawyers to resolve issues. However, in cases where members have needed attorneys, we have been able to provide them with legal support. We have a team of lawyers who represent our union and provide whatever legal support is necessary.

4. Will an attorney be provided from the national union during bargaining?

Our approach to bargaining, like organizing, is that it must be member-led. Workers democratically elect a bargaining team made up of their peers to lead bargaining, with the assistance of UAW International Reps who have experience bargaining contracts for academic workers. International Reps also help train bargaining team members in contract negotiations. In addition to this, we have a team of attorneys from the national union who provide legal advice throughout the bargaining process.

5. What is the strike pay rate?

When members democratically decide to go on strike, striking members are eligible for \$500 a week in strike assistance and have their health insurance covered if it is taken away by the employer.

Dues and Financial Transparency

1. What is the total dues rate (including all fees or additional expenses)? (Natalie)

All members contribute 1.44% of their monthly gross salary in dues plus a one-time \$10 initiation fee in order to build collective resources and power.

2. What are dues spent on? What percentage of dues would RPSPs have control over?

Dues are a critical aspect of unionized workers' ability to have the independent resources necessary to negotiate as equals with their employers. UAW members at the 2022 Constitutional Convention approved a dues distribution as follows: 21% of dues go to the National Strike and Defense Fund to provide pay for striking workers and also support for new organizing campaigns; 36% goes to National legal, educational, bargaining, research, and other resources that Local Unions can avail themselves of, plus new worker organizing; 40% goes to Local expenses such as contract enforcement, membership education and organizing, contract bargaining; 3% goes to supporting our Regional political and community work. RPSPs will be able to participate with all UAW members in National governance processes (directly elected national leadership and International Constitutional Convention), and through Local and Regional governance processes (elected boards, stewards, bylaws).

3. At what point do new members start paying dues (i.e. do members without a contract pay dues)?

Members *only* start paying dues once they have a democratically ratified contract.

Bargaining and Decision-Making

1. What was the total duration of bargaining to win the most recent contracts?

The more workers who participate in forming their union and building a strong contract campaign, the more power you will have to quickly reach an agreement. The length of time necessary to negotiate a strong first contract has depended on the strength of the campaign and the willingness of the employer to bargain in good faith. In the UAW, higher ed contracts typically take 6-12 months. UC Student Researchers reached an agreement after 11 months; USC graduate student workers reached an agreement with USC and ratified their contract in 8 months; University of Alaska graduate workers ratified their contract after 3 months; UW Research Scientists reached an agreement and ratified their contract after 12 months.

2. Who makes decisions on bargaining priorities?

Workers in the unit decide on bargaining priorities. Under collective bargaining in the UAW, workers fill out bargaining surveys to articulate priorities for a contract. They also elect representatives, i.e. coworkers, to a bargaining committee. Guided by the feedback in the bargaining surveys, the elected committee develops bargaining goals that workers in the bargaining unit vote to approve, before sitting down with the administration and negotiating contract proposals. Once a tentative agreement is reached, workers must vote to accept or reject the contract before it goes into effect.

3. How is the decision to strike made?

Striking is a powerful tool for workers to achieve our objectives. Workers in the unit would decide democratically whether or not to call a strike. Under the UAW constitution, a strike can only occur after a vote in which 2/3 of members voting authorize their elected representatives on the bargaining committee to call a strike.

All elements of the contract campaign - including deciding to strike - are highly democratic. Workers typically have many conversations, town halls, membership meetings, and more before deciding whether or not to strike.

4. Bargaining negotiation that failed: Why do you think it failed?

A contract is a reflection of the power that workers are able to build on the ground. It doesn't matter how strategic and hard the bargaining committee bargains if what they do at the negotiating table isn't backed by workers on the ground ready to fight.

In 2018, UAW 2865 (now UAW 4811) negotiated a successor contract that, while making some important improvements, fell short of what workers knew they deserved. When negotiations for that contract began, our membership was at historic low (38%), membership was concentrated in the arts and humanities, and we lacked leaders in most departments. To make matters worse, the Supreme Court was preparing to rule on a case that would strip public sector unions of much needed resources to organize. Because we had failed to build sufficient power, the contract we won lacked many of the improvements we had originally sought.

The 2018 bargaining cycle in UAW 2865 was a wake-up call for many members who realized that the only way we were going to win a contract that could transform our lives and working conditions was if we built lots of power ahead of the 2022 negotiations. Many of these workers ran for leadership and turned the union around, growing to supermajority membership, organizing 17,000 new workers, and leading a strike with UAW 5810 that involved 48,000 workers across UC. The contracts workers won in 2022 set a new standard for academic workers everywhere.

Membership and Leadership

1. What is your leadership model?

At the statewide level, UAW 4811 has two main representative bodies: the Joint Council and the Executive Board. The Joint Council is made up of 134 Head Stewards elected proportionally by campus and bargaining unit as well as the eleven members of the Executive Board. This body is responsible for setting the general direction of the union and meets quarterly. The Executive Board consists of eleven elected officers, including the president. All positions on the Executive Board, with exception ASE Statewide Unit Chair and the PD/AR Statewide Chair, are elected at-large across all bargaining units. The Statewide Unit Chairs are elected from their respective bargaining units.

In addition to the Joint Council and the Executive Board, there are hundreds of stewards elected at the department level.

All new bargaining units have a say in what their leadership structure looks like.

2. What percentage of represented workers in 4811/relevant UPTE unit were dues-paying members in November 2024?

The combined membership across all three bargaining units is currently 60%.

3. Given your union's national presence (and representing different sectors within higher education), how does the local chapter retain influence over its priorities without being overshadowed by national issues?

Since UAW Locals have strong independent governance structures, they retain influence over the decisions that most directly affect Local members. In addition, higher education Locals in UAW each have individual agreements negotiated between their Local elected leadership and the employer. This structure has resulted in a dynamic, diverse group of Local unions across the country, each of whom features its unique contributions to the higher education landscape and helps improve standards for the entire movement.

4. What are the job titles in your units and how similar are RPSPs to these job titles?

UAW represents over 120,000 higher ed workers in dozens of job titles. Specifically at UC, we represent researchers, associate researchers, assistant researchers, specialists, associate specialists, assistant specialists, junior specialists, project scientists, associate projects scientists, assistant project scientists, coordinator of public programs, associate coordinator of public programs, assistant coordinator of public programs, academic achievement counselors, admissions recruitment specialists, career services specialists,

curriculum planners, financial aid officers, student academic specialists, student affairs officers, student academic advisors, student life development specialists, registrar specialists, advocates, postdoctoral scholars, teaching assistants, teaching associates, tutors, readers, graduate student researchers, graduate student trainees, graduate student fellows, and more.

Many workers in our Postdoc, Academic Researcher and Student Services and Advising Professionals units work alongside RPSPs. These workers do similar work including research, work in core facilities, centers and labs, policy review and analysis, data analysis, grant acquisition and management, and much more.

Political and Strategic Vision

1. What are some recent political actions the union has taken to advocate for your workers on the state or federal level?

UAW members at UC and across the region have a long history of political action to lift standards for workers at UC and beyond. UAW 4811 members have advocated for increased federal funding for research, stronger protections for visa holders and undocumented immigrants, and progressive policies to address the cost of housing. In 2019, UAW 4811 members successfully sponsored a bill to make UC subject to the same wage theft laws that other employers are subject to. This past election cycle, UAW workers in California helped elect dozens progressive, pro-labor candidates in local, state, and federal races. We also authored and successfully passed a ballot measure in Berkeley to lower rent increase caps and give tenants the right to form tenant unions. UAW 4811 has been helping lead the fight to grant undocumented students the right to work at UC through the legislature and courts.

2. What is your 5-year plan for the union?

Our 5-year plan is to help as many workers as possible to organize unions, to bargain ground-breaking contracts, and to engage in progressive political action in the interest of the working class.

Part C: UPTE Answers to Questionnaire

UPTE Personnel:

Dan Russell, UPTE President

Amy Fletcher, Treasurer

Paul Waters-Smith, Executive Director

Kadie Manion, Southern External Lead Organizer

Will Schneider, Organizer

Organizing Strategies and Philosophy

1. What were the strategies you deployed for organizing the existing bargaining Unit?

The existing Healthcare (HX), Research (RX), and Technical (TX) bargaining unit(s) were “organized” in 1996 and 1997 but were for all intents and purposes not organized when our current leadership team was elected in August of 2021. At this time, there was no internal leadership structure and members could only rely on a small number of self-selected activist leaders and staff to service grievances. For all intents and purposes, we have re-built UPTE from scratch over the past 3 years. It feels like a new union that is rapidly growing and evolving as we bring in new workers.

Over the last 3 years we have built a two-tiered organizing committee at each campus by identifying, recruiting, and developing the organic leaders in each worksite. Unit Representatives (~150 statewide) are responsible for all workers in large Departments or titles/classifications on a campus and work with a team of Workplace Representatives (~800 statewide) who are responsible for individual worksites.

Unit Representatives meet together for a full day of training and organizing each month and worksite representatives meet with their unit representatives, with their whole campuses, or statewide via Zoom as necessary.

Through this process, we have increased our membership from 8,500 to 13,000 in just over 3 years and have won dozens of workplace issue fights around market pay, workloads, staffing, scheduling, work space, and more. You can see some coverage of these on the news page of our website.

Part of this growth is explained by UC's acquisition of 9 new hospitals. Another part is explained by our accretion of titles that have been unfairly excluded from representation - Educational Technology Specialists, Museum Educators, Behavioral Health Clinicians, Dietitians, Pharmacists, and Optometrists have all joined our union over the past 3 years.

Most recently, all of this preparation culminated in our largest ever strike at a single campus on November 20-21st, in response to UC's unfair labor practices during our contract negotiations.

2. What is your philosophy for organizing?

We believe in empowering workers by identifying organic workplace leaders where they exist, fostering leadership development where they don't, and helping leaders develop the skills to address problems in their worksites. We believe the union's job is to bring them together with workers who share similar problems across our campuses, across all of UC, and in our communities across the state. Through this process, workers develop the trust and relationships that are the foundation of a democratic union and a democratic society.

We have been heavily influenced by Labor Notes, Jane McAlevey, and the CIO's traditions of militant, industrial unionism.

3. What's your experience with organizing a bargaining unit that includes a wide variety of job titles?

That has been our entire experience over the past 3 years - UPTE represents dozens of job titles in healthcare, research, and technical support, who earn from less than \$20/hr to more than \$100/hr. Most of these titles do not interact with one another on a daily basis and some of them work in near-complete isolation.

However, when we bring these workers together as unit representatives to discuss the problems they face at work, they quickly realize that they are facing the same ones: bad management, short staffing, low pay leading to turnover and burnout, lack of career progression, etc.

In our experience, when one group of workers win on an issue, they often inspire other groups to follow their lead. It has been truly heartening to see these workers develop deep relationships of solidarity over the past 3 years of working together.

One great example of this was Electronics Technicians at UC Santa Barbara. They are a relatively small group at a relatively small campus and felt that their needs hadn't been

adequately addressed in UPTE's 2019 contract. They came together and did a series of actions in 2023 that culminated in additional pay raises of up to 7% in 2024.

Another is a victory on Sea Pay for our RX and TX members who work for SIO at UCSD. They had pushed for improvements to additional compensation when they spend days - if not weeks - at sea on research vessels. After this was not addressed in multiple contract cycles, we supported their fight to restart stalled negotiations and take a series of escalating actions that culminated in a march on the director of SIO and win significant improvements.

After an extensive campaign including sign on letters, packed meetings with management, marches on the boss, and coverage in the San Diego Union-Tribune, dozens of Clinical Research Coordinators won reclassification and significant raises at Moore's Cancer center.

More recently, more than a hundred UPTE Research and Technical joined Staff Research Associates at UC Davis' California Animal Health and Food Safety Laboratory to protest short staffing, blowing the whistle on unsafe staffing conditions which is receiving national attention, including in the LA Times.

4. Tell us about one recent organizing effort you were a part of that failed. Why do you think it failed?

2 examples we think are instructive and relevant:

1. UPTE's previous efforts to form new bargaining units for all Administrative Professionals (IT, Student Advisors, and other Analysts) and later for Student Services Professionals. Both failed because UPTE's leadership at the time did not have a clear plan to win and were not following or enforcing good organizing practices (eg. leadership identification, organizing conversations, structure tests, etc.).

When the campaigns did not hit targets that were set for activist recruitment or pre-authorization commitment cards, rather than acknowledging the problem or changing strategy, they just pushed ahead.

Dan remembers being at a statewide campaign "launch" event for APs in 2015 or so where the goal was 500 activists in attendance and only 50 showed up. There was no real soul searching here but it did lead to ambitions being scaled back and a focus on organizing Student Advisors into a new unit and accreting IT titles into TX.

Because of the failure to follow good organizing practices, UPTE's existing bargaining units were not well organized either. This meant that when the Janus decision ended fair-share fees, UPTE lost a significant amount of resources, meaning there were far fewer resources to invest in external organizing.

The Student Advisor campaign limped along for years, making little to no progress, until our team was elected and we paused it in order to focus our resources on rebuilding our internal organizing infrastructure. This was a difficult decision but one which we knew was necessary in order to lay the basis for successful new organizing.

3 years later, with significantly more resources and nearly 1,000 workplace reps across the state, we are more prepared than ever to aggressively organize all career professional workers.

2. UPTE's previous leadership allowed UC to withhold some of the most important benefits of the contract - contractual ATB raises, healthcare premium caps, and improved pension benefits - from workers until they had finished bargaining over pay scales for their title after a group was accreted.

UPTE's former logic was that workers would be motivated to get involved in the fight for a fair pay scale because they wouldn't get these other benefits until a pay scale was established.

Because workers were not consulted, this became disastrous when UC dug in their heels and refused to agree to fair pay scales: forcing workers to either accept subpar pay scales or go without improvements of the UPTE contract for a long period of time.

Fortunately, in 2022, we were able to force UC to agree to change course on this, providing all of these things from the time that workers were accreted and winning significant back pay (up to 23%) for wages that had been withheld during ongoing accretion bargaining.

Following this, Systems Administrators recently won an accretion agreement with pay scales that included raises of up to 20% for workers who were paid far below others at their campus.

Bargaining for some accreted titles has now been rolled into successor negotiations because UC refused to agree to fair pay scales during the term of the contract.

5. What are the benefits and drawbacks of accretion vs. ground organizing?

The main benefit of accretion organizing - and the point of the accretion process - is keeping as many workers in the same bargaining unit as possible, increasing their overall leverage to win on issues that they share. This also provides important opportunities for career development, especially when entry level titles are in the same bargaining unit as more advanced titles. The University has deliberately pursued a strategy of undermining UPTE's existing bargaining

units by moving work previously done by HX, RX, and TX titles to non-union titles who often do similar, if not identical work. For example, Dan was hired as a Business Technology Support Analyst, doing the exact same work as his colleagues who were in Computer Resource Specialist titles. We have seen the same pattern with Lab Mechanics and Research & Development Engineers.

The other significant benefit of accretion is that workers do not have to bargain for an entire new contract on their own - they immediately get the improved job security, raises, and benefits of an existing UPTE contract.

Even if we utilize an accretion process to bring in new job titles, we will still implement a ground organizing strategy in order to sign up new members, identify leaders, take on issue fights in the workplace, and go on strike if necessary to win improvements in upcoming contract negotiations. Accretions allow workers to quickly get the union benefits and protections that they deserve but it does not replace ground organizing to build a strong, fighting union.

As mentioned above, accreted titles will still have to organize and fight for a fair pay scale - one with steps that aligns with the market and allows for future salary growth, whether that is done as part of accretion or full contract bargaining.

Not bargaining a whole new contract could be presented as a downside, although in our opinion expending the limited leverage that a smaller unit has to attempt to match the standards of existing bargaining units is a major liability when weighed against the opportunity to simply receive the already established Union standards (such as the right to retire at 60, which only UPTE, AFSCME, and CNA have maintained for those hired after 2013) and focus our leverage on offensive demands.

Joining an existing bargaining unit that has already won strong union benefits - such as UPTE's Healthcare, Research, or Technical Units - offers the ability to receive improved benefits and job protections right away, while maintaining the right to bargain over title specific demands and strike over contract-wide improvements with tens of thousands of similarly situated employees.

6. If you are planning on accreting a subset of RPSPs, which job titles and why?

Our goal is to accrete every title that shares a community of interest with our existing Research and Technical units - we have no intent to leave anyone behind. Your committee working with UPTE could help speed up this process significantly.

Resources and Support

1. What specific resources, both financial and human (e.g., staff, organizers, volunteers), will you commit to spending on the organizing and card drive efforts in 2025? How will these resources be allocated to ensure success?

We are creating a dedicated full-time external organizing team, which currently has 5 existing and 3 recently-created positions. We have a data and comms staff position dedicated to external organizing as well.

We have a number of experienced member-leaders on each campus who are excited to help with external organizing by taking part-time leave from work.

As soon as we finish our ongoing contract negotiations, we will plan to pivot the majority of our organizational resources - ~50 full time staff - to supporting external organizing in every way Possible.

One advantage of a title-by-title approach is that we don't have to collect cards for the entire group all at once; we can bring an entire title series under a contract in a matter of weeks.

2. What are the staff resources you can provide for organizing, disputes, and bargaining?

Our current internal field structure is Northern and Southern Directors, each with 3 regional lead organizers, each with 2-3 organizers. We have other staff dedicated to contract enforcement, research, and communications.

3. Would members have direct access to an attorney throughout each year (e.g., for disputes or questions)?

We have both in-house counsel and an outside legal team to help with any and all legal issues that our organizing staff aren't equipped to handle.

4. Will an attorney be provided from the national union during bargaining?

Because we handle our own bargaining and contract enforcement - including choosing our own attorneys - we keep significantly more of our own resources than other CWA Locals do and more than many International Unions allow (eg. UPTA keeps 70% of its dues, whereas UAW Locals keep 50%).

5. What is the strike pay rate?

We have a strike hardship fund that pays a minimum of \$60/day, although our Executive Board authorized \$100/day for our most recent strike.

Dues and Financial Transparency

1. What is the total dues rate (including all fees or additional expenses)?

Dues are 1.3% of pay per month.

2. What are dues spent on? What percentage of dues would RPSPs have control over?

We spend more than 80% of our dues on our staff payroll and reimbursements to UC for member-leaders who are released from work to participate in union activity, with the rest split between administrative costs, professional services, and ancillary organizing costs.

Currently, our Executive Board (5 officers + 1 or more seats per chapter, depending on membership) sets a budget for each chapter to help track chapter-specific (eg. UC Berkeley or UCLA) spending. We do not allocate dues by bargaining unit.

3. At what point do new members start paying dues (i.e. do members without a contract pay dues)?

New, non-represented members do not pay dues. Dues deduction will begin when they get their first across-the-board raise from an UPTE contract.

Bargaining and Decision-Making

1. What was the total duration of bargaining to win the most recent contracts?

We began bargaining our successor agreements in June of 2024.

Our previous bargaining began in May of 2017 and we settled contracts in August of 2019. The delay in reaching agreement was in part due to a delayed escalation strategy on behalf of UPTE's previous President (see answer 4 below) but also of course to UC's refusal to negotiate in good faith until we went on strike.

2. Who makes decisions on bargaining priorities?

Under Amy and Dan's leadership, UPTE members set their bargaining priorities for our current contract negotiations directly via a multi-step process and - for the first time - directly elected their bargaining team.

First, we used a "Contract Priorities" form to ask members what their top 3 priorities were. This

was filled out by 4,000 members in 2022. We took these priorities and used them to form our Bargaining Survey, which was filled out by 8,000 members.

The vast majority of the responses were collected via in-person conversations, not mass communications. We intentionally prioritized in-person and worker-to-worker organizing conversation happening first, rather than simply sending out email solicitations, to make sure that members understood what these steps were, how they fit into the bargaining process, and that their action would ultimately be needed to win these things.

We then turned the results of the Bargaining Survey into a Platform, which was ratified by over 9,000 members at the same time that members elected their bargaining team, which is currently made up of 11 HX and 16 RX/TX members, proportional to the size of the bargaining unit and campus.

At the time of the platform ratification these 9,000 members represented a majority of career-appointment UPTe employees. We pivoted from a bargaining convention model to direct ratification in an effort to make sure all UPTe members had the ability to have a say in their contract and their priorities.

Thanks to the work that we had done building our Unit Representative structure, everyone elected to the Bargaining Team was a Unit Representative as well. This meant that our team had each spent months meeting with fellow leaders from other titles and workplaces on their campus, learning about each others' issues and priorities.

3. How is the decision to strike made?

The Bargaining Team recommends a strike vote be held, which is voted on by the Executive Board. Members must then vote to authorize a strike (or strikes) to be called. UPTe's Officers then decide when, where, and for how long strikes will be called. A supermajority (including 78% of Healthcare workers) of UPTe-represented workers participated in our recent strike vote at UCSF.

4. Bargaining negotiation that failed: Why do you think it failed?

We can't say that we've been part of negotiations that failed, but will describe some weaknesses in UPTe's 2017-2019 bargaining strategy.

In 2017, UPTe's leadership had not done the hard organizing work to build a leadership structure that could engage the majority of members, which meant that only ~2,500 people filled out the bargaining survey, a majority of those after it was mass-emailed to membership. UPTe did begin building a workplace leadership structure well after bargaining had begun - after Dan was elected Executive Vice President as part of a reform slate in early 2018 - and quickly made significant progress which allowed UPTe to sustain participation of thousands of workers

over 8 days of striking.

UPTE won caps on healthcare premiums, daily overtime, 29-32% raises including steps, and defended the right to retire 5 years earlier (which all UC workers hired after July 2013 and not represented by UPTE, AFSCME, and CNA lost).

Had we begun negotiations with a clear campaign plan and escalation strategy, we believe we could have won more - such as annual steps for all units, improved job security, and better reclassification guarantees, which we are fighting for in our current negotiations. Still, organizing thousands of members to strike repeatedly for the first time was a positive step for UPTE, which we have built on in our current negotiations.

Membership and Leadership

1. What is your leadership model?

Our leadership structure is based on concentric layers of representation, which allows for the fullest consultation of UPTE's 20,000 workers through 950 workplace leaders. UPTE workplace leaders who take on greater responsibility sit on its Executive Board and the Unit Representative councils at each campus.

UPTE's Officers develop goals, plans, and strategies in conversation and consultation with each layer of leadership and constantly revisit and revise them.

We believe this is the best way to have a real democratic conversation among 20,000 people and is a model that can be scaled upon to build a democratic society of millions.

2. What percentage of represented workers in UPTE were dues-paying members in November 2024?

67% - up from 52% in December of 2021, shortly after our team was elected.

3. What are the job titles in your units and how similar are RPSPs to these job Titles?

Here is a somewhat dated list of all of the titles (some of these are no longer in use, it does not include the few titles accreted in the last ~8 years)

We believe there is a strong community of interest between RPSP and RX and TX titles and that the University has inappropriately excluded your titles from the benefits of our contracts for years now.

Our SRAs and CRCs often work closely with Research Data Analysts, Project Policy Analysts, and Research Administrators. As mentioned before, our Laboratory Mechanics, Marine Technicians and Development Technologists often work closely with or even do the same work as R&D Engineers. UPTe-Represented IT titles overlap quite a bit with the Bioinformatics Programmers. We believe there is a strong community of interest between all of the RPSP titles and our RX/TX titles, and we would have the most power if we were united in one union.

Political and Strategic Vision

1. What are some recent political actions the union has taken to advocate for your workers on the state or federal level?

We spent most of the last 3 years focusing on building our internal leadership structure and preparing for contract negotiations. We believe successful engagement in politics depends first on an organized, engaged, and educated Union membership. Over the past year UPTe decided to launch its political program in earnest - interviewing and endorsing candidates across the state as we look to advocate for increased investment in research in the public interest, public education, and expanded healthcare services for all.

Before this year we have specifically engaged with legislators to highlight the 2-tier structure that UC has attempted to impose on mental health clinicians by moving work to non-union Behavioral Health titles and paying Social Workers far less in outpatient settings that serve poor communities than those who do the same work for insured patients. In San Francisco, we worked with the Board of Supervisors to pass a unanimous resolution calling for behavioral health pay equity and held a town hall with the Board President which earned media coverage. We have also been meeting with legislators to educate the legislature on UC's unfair labor practices at the bargaining table and to ask for their support. We have been pleased that sitting state legislators have joined our bargaining sessions and called out UC's unlivable wages at the table, along with other local elected officials who have joined rallies and our strike lines throughout the year.

We recently hired a political director to help us develop a more robust political program including moving resolutions at the state level as a path toward legislation. We are holding an UPTe lobby day this month, with leaders traveling to Sacramento from across the state, as we continue to build out a more robust political program to advocate for the issues important to us as UC Research, Healthcare, and Education professionals.

2. What is your 5-year plan for the union?

Our 5 year plan is to grow the union significantly and build stronger alliances with community

partners and other unions in order to have more power in our fight with UC and to be part of a broader fight with other workers against the billionaire class.

We know that many thousands of other UC workers likely should be in UPTE's existing bargaining units and that many more Professional workers want and deserve union contracts at UC. If we return to the bargaining table in 2028 with 10,000 more workers - including the many non-union titles that UC will rely on during any strikes before then - we will have significantly more leverage to advocate for our patients, research, and students.

We plan to continue building power at the workplace, across our campuses, and across UC and win our contract fights as soon as possible, which will help our members fully understand the power that they wield as workers standing together, and highlight the immediate benefits for non-Union workers to be covered under those contracts.

We also want to engage members in a similar process to understand our collective desires and needs in our communities - and how we can win these things - as we did with our Bargaining Survey. We know that our members are concerned about the environment, healthcare costs, housing, education, and equality - and that we can't solve any of those problems just as UPTE or by bargaining with UC.

We intend to work with other unions and stakeholders to make sure that we are developing collective priorities and also developing members who are willing to run for office to support our priorities, rather than just supporting politicians who say they support us.

Signees:

Austin Edwards, UCSF, Bioinformatics Programmer 3

Michael McCormack, UCLA, Research Data Analyst 3

Jessica Stevermer, UCLA, Research Administrator 4

Jacob Morgan, UCSD, R&D Engineer 2

Leila Espinosa, UCLA, Project Management Professional 3

Nikta Akhavan, UC Berkeley, Project Policy Analyst 3

Emily Flynn, UCSF, Bioinformatics Programmer 4

Sean Buchanan, UCSF, Research Administrator 3

Luis Gutierrez-Mock, UCSF, Project Policy Analyst 4

Elise Hellwig, UC Davis, Research Data Scientist 3

Charlotte O'Keefe Stralka, UC Berkeley, Project Policy Analyst 2

Ryan Pfleger, UCLA, Project Policy Analyst

Emily Jacobson, UC Berkeley, Project Policy Analyst 3

Nora Mascioli, UCSD, Research Data Analyst 3

Lee Einhorn, UCSF, Research Administrator 3

Brandon Jolly, UCLA, Research & Development Engineer 4

Christina Becker, UC ANR, Project Policy Analyst 4

Deborah Ferguson-Fitch, UCSF, Research Administrator 4

Kristina Hallez, UC Berkeley, Project Policy Analyst 3

Sam Richey, UC Berkeley, Project Policy Analyst 2

Kris Stangl, UC Berkeley, Research Administrator 4