

Summary of the Amalgamation Committee's Findings

Introduction

The Amalgamation Committee was formed following the Amalgamation Exploration Resolution passed at the April 2023 Statewide Monthly Membership Meeting by Local 2865 and Local 5810. The committee is composed of eleven members of each Local Union (11 from 5810 and 11 from 2865), as well as two ex-officio members (presidents of 2865 and 5810) who are serving as non-voting members of the committee providing background information and answering questions. Any member could self-nominate to sit on the joint committee and the Joint Council officers voted to designate 11 representatives from their Local. For a list of the Amalgamation Committee members, please see [Appendix A](#).

The committee was charged with the following tasks:

- 1) Research other local unions with multiple and/or amalgamated units to see their leadership structure, with an emphasis on academic unions
- 2) Collect robust and representative feedback from members
- 3) Develop and present options for leadership structures and a potential timeline regarding a deliberation and decision-making process (e.g. referendum vote) - this will be presented at the July Joint Council meeting for the body's consideration
- 4) Present scope of potential changes that need further investigation

The resolution recommended by this committee should be considered alongside the committee's findings detailed in this memorandum.

Opportunities & Challenges

Amalgamation: Why Now?

Academic workers of UAW 5810 and UAW 2865 have always shared a community of interest. It is common for Postdocs, Academic Researchers, and Graduate Workers to share the same labs and classrooms. Additionally, academic workers transition between locals as Graduate Student Workers become Postdocs, or Postdocs become Academic Researchers, or Academic Researchers become Graduate Student Workers. Following the 2022 coordinated contract campaign and strike, informal and formal collaboration between each local became essential. There has been great success in joint statewide and campus level organizing committees, coordinated contract enforcement strategies, and in cross-unit action planning. Due to the

growing solidarity between locals and identification as academic workers broadly, leaders began to consider the opportunities formally amalgamating UAW 2865 and UAW 5810 would bring.

This research memo includes information on the organizational and structural similarities and differences between locals, provides an overview of some of the opportunities and challenges of amalgamation, considers key topics such as bargaining and resources, and imparts a recommendation for a potential amalgamated structure.

What are the opportunities and challenges facing potential amalgamation of 2865 and 5810?

This list was generated based on the literature, committee member expertise, and conversations with staff and member leaders. Many of these topics are discussed in depth in specific subsections in the memo.

Opportunities:

- An amalgamated local union represents the opportunity to build power.
- Potential to build and solidify solidarity among academic workers who share a community of interest but work in different job titles and are represented by different UAW locals.
- Amalgamation would reflect many of the current practices that are already happening across units like cross-unit organizing committees, membership meetings, shared databases, etc.
- Potential for increased coordination between units during bargaining.
- Potential for improved organizational efficiency, resource-sharing, and decreased operating costs.
- Combined group of delegates would have a major presence at UAW conventions.
- Potential for more political power in the California legislature, as an amalgamated union of 48,000+ workers.

Challenges:

- Navigating an amalgamated leadership structure that preserves the voices of all members, not only in terms of differing local and unit sizes (e.g. 5810 is about 1/3rd the size of 2865, different campuses have different membership sizes) but also the challenges that come with dramatically increasing the size of an organization while simultaneously creating mechanisms to ensure we are as democratic as possible.
- Navigating how we share financial and other resources between units considering differing average per member dues contribution between locals¹.

¹ It is estimated that the total combined dues contribution between the ASE and SR units will be roughly equivalent to that of the Postdoc and AR units when SR dues deductions begin.

- A short-term challenge includes changing and merging all bylaws and carrying out the practical work of amalgamating.

Why have unions amalgamated historically?

Other Academic Unions

Across the United States, the vast majority of Higher Education workplaces where multiple job titles are unionized (i.e., including graduate workers, Postdocs, and other researchers) are organized into amalgamated local unions. Examples include UAW 4121 at the University of Washington, UAW 6950 at the University of Connecticut, UAW 2322 at University of Massachusetts Amherst, and Rutgers AAUP-AFT. Furthermore, other Local Unions which represent workers at the University of California have multiple units, including UPTE, AFSCME 3299, and UC-AFT. Most of these local unions were never constituted as separate bodies. Instead, when a new unit of workers was organized, these workers elected to join existing local unions, as was the case for Postdocs at Washington, Connecticut, and Massachusetts. This was also the case for Locals 5810 and 2865, which added Academic Researchers in 2019 and Student Researchers in 2022, respectively. In interviews with members of these locals, as well as a review of communications from these locals, the common denominator for why workers chose to amalgamate was to increase each unit's power through solidarity with other academic workers at the same workplace. In an interview with Max F., a Postdoc at UAW 4121, he noted that Postdocs chose to join the Local in order to pool and stabilize resources² and because the two units shared many of the same goals. Though graduate workers were not on strike during the 2023 strike of UW Postdocs and RSEs³, many joined picket lines and provided strike support as their fellow members fought for new contracts. At Rutgers, where AAUP-AFT represents tenure track faculty, non-tenure track faculty, Postdocs, and graduate workers, part-time and full-time staff fought to merge prior to the expiration of their collective bargaining agreements⁴, setting the stage for their successful 2023 multi-unit strike⁵.

So why, then, did academic workers at the UC end up in separate Local Unions? Our current structure is not a result of the democratic choice of the workers who were originally involved. In 2010, after PRO/UAW⁶ was successful in winning its first contract, the consensus view of the Postdoc organizing committee and bargaining team was to join UAW 2865, given that many of the organizers were formerly members as graduate workers. However, faced with an International Executive Board which was wary of the prospect of creating a large Local of

² As ASEs transitioned to Postdoc roles, they remained members, counteracting the high job turnover in the Local.

³ Research Scientists and Engineers, a newly-formed unit of workers at UW equivalent to ARs at the UC.

⁴ <https://www.njspotlightnews.org/2022/05/op-ed-rutgers-adjuncts-union-merger-negotiations-faculty/>

⁵ <https://www.cbsnews.com/philadelphia/news/rutgers-university-strike-unions-ratify-new-contracts-formally-ending-strike/>

⁶ The organizing campaign to unionize UC Postdocs which eventually became UAW 5810.

academic workers and academic worker organizing in the UAW writ-large, Postdocs were instead placed into a wholly separate Local union, UAW 5810. In fact, the amalgamation of Locals 2865 and 5810 can only now be a consideration given the changing attitude of the broader UAW leadership, including the re-formation of UAW Region 6 on the West Coast.

Amalgamation in the Broader Labor Movement (Sources in [Appendix C](#))

During the 1980s-early 2000s, unions in the US, Australia, and UK (and elsewhere) began merging locals as a way to deal with a lack of proactive organizing that resulted in low membership numbers, declining unionization broadly, fewer financial resources, and increased foreign competition in the labor market (deindustrialization) and employer power. It was a strategy to consolidate and build power during a time of union membership decline. Due to this context, some of the literature may be less applicable to our question of merging two large public sector locals of academic workers who work for the same employer. Regardless, the literature provides valuable insight into opportunities and challenges faced by other amalgamated unions (a bulleted list available in Appendix C). One area of the literature is clear – there is tension between the increased efficiency and resource-sharing possible in larger amalgamated locals versus the potential for poorly managed mergers which fail to further the organizing mission of its units, including fostering broad democratic participation. A lingering question for this literature has been are bigger unions better unions? And in what ways? Another interesting insight is that union amalgamations often fail either due failed initial discussions, differences being unable to be resolved, or members voting down amalgamation due to concerns or reluctance to merge that fail to be addressed through a transparent, democratic, and participatory process.

What becomes clear when evaluating the literature on union amalgamation is that UAW Locals 2865 and 5810 are considering amalgamation in a drastically different environment, both locally and for the labor movement writ-large. Whereas many unions considered amalgamation to stave off membership decline and as a substitute for organizing new units of workers, 2865 and 5810 are considering amalgamation at a time of historically high membership and fervent new organizing drives. Whereas unions in the past considered amalgamation during a time of historically low union favorability and popularity, 2865 and 5810 are considering amalgamation during a wave of labor militancy and popularity. In short, amalgamation was previously considered as a tactic during the nadir of labor power, whereas Locals 2865 and 5810 are considering it at a relative apex.

Background

Differences Between Unit Structures

A detailed analysis of the differences between the locals in terms of leadership structure and bylaws can be found in [Appendix B](#).

Currently, there are approximately 19,000 Academic Student Employees, 17,000 Graduate Student Researchers, 7,000 Postdocs, and 5,000 Academic Researchers*--bringing the total represented workers of an amalgamated union to 45,000.

General Membership

UAW 2865 is open to all graduate students at UC (Fellows, Graduate Student Researchers, Teaching Assistants, and Graduate Student Instructors), and undergraduate students who hold represented job titles (Tutors, Readers, and Undergraduate Student Instructors). Currently, there are ~36,000 represented workers statewide (19,000 Academic Student Employees and 17,000 Graduate Student Researchers). Members in good standing are all grad students and all employees in titles that come under the jurisdiction of the Local who pay the appropriate dues. All members in good standing have full voting privileges.

UAW 5810 is open to Postdoctoral Scholars and Academic Researchers (Specialists, Project Scientists, etc.). There are ~12,000 represented workers statewide (7,000 Postdocs, and 5,000 Academic Researchers*). Members in good standing are all employees in titles that come under the jurisdiction of the Local who pay the appropriate dues. All members in good standing have full voting privileges.

Recommended Amalgamated Structure

Introduction

As they stand today, the structures of the two unions largely mirror each other and are formally independent, with separately elected executive boards, joint councils, and bargaining teams, though collaboration between these bodies has increased dramatically in the past two years. Moreover, the myriad campus-level bodies, such as monthly membership meetings, organizing committees, and contract enforcement committees, currently operate at various levels of integration between the two locals from completely separate to fully joint. Given the current structure of the two local unions, this section will make recommendations on the formal structure of an amalgamated union in alignment with the principles outlined in the Constitution of the International Union, UAW, and the introduction of this memo.

As per Article 19, Section 5 of the UAW Constitution, “The general meeting of the Local Union members of an establishment under the jurisdiction of an Amalgamated Local Union shall be the highest authority for handling problems within the establishment”⁷. This core principle is also outlined in the current bylaws for both Locals 2865 and 5810, which both state that “The membership is the highest authority of this Local Union”⁸, where decisions in-between membership meetings are made by the Joint Council, decisions in-between Joint Council meetings are made by the Executive Board, and decisions in-between Executive Board meetings are made by the President, with decisions subject to approval by the preceding bodies. The recommendations outlined below shall retain that structure and ensure that the relevant bodies are constituted to make decisions effectively at the direction of the membership. Where similarities between the two Local Unions exist, they will be largely retained and where differences exist, those differences will be treated by the following recommendations⁹.

Executive Board and Local Union Executive Officers

General Structure of the Executive Board

The Amalgamation Committee recommends that the Executive Board be populated by the following Executive Officers: **President, two (2) Vice Presidents, Recording Secretary, Financial Secretary, Sergeant at Arms, Guide, and three (3) Trustees.**

In determining the proposed structure of the Executive Board for the Amalgamated Local, the central priority is ensuring that the Executive Board is composed of officers who can sufficiently and accurately represent the interests of members from all units, building solidarity and unity among members from different units. Members of the Executive Board should see their role as representing and furthering the goals of the general membership, not solely the members of the unit to which they belong or by whom they are elected. Amalgamated Local Unions across the Higher Education sector achieve this goal through a variety of different structures well-suited for their specific situation, and these examples have been considered in establishing these recommendations. With respect to Locals 2865 and 5810, the structures of the Executive Boards are largely in alignment, with the primary exception of the offices of Vice President and the inclusion of At-Large positions on the 5810 Executive Board. The recommendations below largely retain that structure and treat those exceptions in a manner that best positions the Executive Board of the Amalgamated Local to achieve the goal of proper representation.

⁷ UAW Constitution, Article 19, Section 5

⁸ UAW 2865 Bylaws, Article 5, Section 1 & UAW 5810 Bylaws, Article 6, Section 1

⁹ For a full treatment of the current structures of Locals 2865 and 5810, see this memo’s section on Background and Appendix B.

Except for the Vice Presidents and the Trustees, all members in good standing from any unit who meets the eligibility criteria for elected office within the Amalgamated Local shall be eligible to run for any of these positions and will be elected by a vote of all members in good standing of the Amalgamated Local. This results in an Executive Board with 10 members, equivalent to the current 10 members on the Local 2865 Executive Board and one less than to the 11 on the Local 5810 Executive Board. Having an Executive Board composed of Officers elected regardless of unit – with the exception of Vice Presidents and Trustees, as described below – will further the goal of integrating the shared mission of members from each unit. When members see an Officer from a different unit representing them and fighting alongside them for their interests, it can foster a strong sense of unity and solidarity between the units, cementing the idea that all academic workers share a community of interest. In an interview conducted with a Postdoc leader at UAW 4121 at the University of Washington, the leader noted that when Postdocs saw their President, a member from the ASE unit, joining them on the picket lines during a strike of Postdocs and Researchers, it sent a strong message of solidarity that extended across units¹⁰.

Vice Presidents

The two Vice Presidents will serve in the following offices: **Vice President for ASEs/SRs and Vice President for Postdocs/ARs**¹¹. The ASE/SR Vice President shall be a member in good standing in either the ASE or SR unit and shall be elected by a vote of the ASE and SR members in good standing. The Postdoc/AR Vice President shall be a member in good standing in either the Postdoc or AR unit and shall be elected by a vote of the Postdoc and AR members in good standing.

Succession to the Presidency

Perhaps the most important role of a Vice President is to be ready and able to succeed to the Presidency in the event that the office becomes vacant¹². Given the number of Vice Presidents in this proposed structure, the question of succession should be decided as follows: in the event that the President is removed or resigns in the middle of their term, the Executive Board will meet and vote to install one of the two Vice Presidents to the office.

¹⁰ Ahmed Akhtar's Interview with Max F from UAW 4121

¹¹ The Amalgamation Committee considered a number of structures ranging from 2-4 Vice Presidents, representation of Northern and Southern campuses, representation by bargaining unit, and so forth.

¹² Currently, Local 2865 uses a complex formula based on votes for the Northern and Southern Vice Presidents and membership numbers in each region to determine which Vice President should succeed to the Presidency, while Local 5810 simply has its single Vice President assume the office.

Trustees

The proposed structure for Trustees on the Executive Board includes one trustee each being elected by and from the ASE/SR, Postdoc, and AR units respectively. With each unit bringing in varying amounts of dues dollars and potentially holding different resource inventories¹³, electing a trustee from each unit ensures that someone familiar with the expenditures of each unit can properly conduct an audit alongside the other trustees. This also has the added benefit of ensuring more seats on the Executive Board are reserved for members from specific units.

Joint Council and Head Stewards

The Amalgamation Committee recommends that the apportionment of Head Steward seats on the Joint Council be modified. Given the wide variation in pay between members across the Amalgamated Local, and as such, dues dollars paid, setting the apportionment directly by dues contribution is infeasible and could result in an uneven distribution of seats on the Joint Council between units and campuses. As such, the apportionment should be set as a function of the number of members in good standing in each unit, with apportionments from each unit roughly modified by the average dues contribution of a member in that unit. For example, if the average dues contribution of a Postdoc is double that of the average dues contribution of an ASE/SR, the Postdoc unit should elect one Head Steward for every n Postdoc members in good standing while the ASE/SR unit should elect one Head steward for every $2n$ ASE/SR members in good standing. The exact apportionments are not provided in this memo and should be decided upon by the Joint Council when considering bylaws amendments if the recommendations of this memo are adopted. Using dues dollars paid is a standard outlined in the UAW Constitution, Article 35, which states that “The membership of the Local Union shall be guaranteed: Proportional representation from each unit, based on the dues dollar each unit pays to the Local Union”¹⁴.

In both Local 2865 and 5810, the Joint Council is composed of the Unit/Campus Chairs, Campus Recording Secretaries, and Head Stewards from each campus, and this structure should be retained for the Joint Council of the Amalgamated Local. The apportionment of head stewards from each unit should be determined so as to maintain the size of the current combined Joint Councils of Locals 2865 and 5810.

Each unit at each campus should retain unit-specific Campus Chairs and Recording Secretaries, meaning that each campus will have an ASE/SR Campus Chair, ASE/SR Recording Secretary, Postdoc Campus Chair, Postdoc Recording Secretary, AR Campus Chair, and AR Recording Secretary. These officers shall serve as the first two Head Stewards at each campus, based on the apportionment established above.

¹³ For further discussion on the sharing of resources, see this memo's section on Resources.

¹⁴ UAW Constitution, Article 35, Section 2

Bargaining Teams

Currently, the Bargaining Team for Local 2865 consists of the Campus Chairs and Recording Secretaries while the Bargaining Committees for Local 5810 consist of the Campus Chairs from each unit. As these positions will be maintained under this proposed structure and each unit maintains a separate contract, the structure of the Bargaining Teams/Committees do not need to change for the purposes of amalgamation.

Standing Committees

Currently, Locals 2865 and 5810 retain equivalent standing committees except for the following, which are established only for Local 2865 by the Bylaws: the Elections Committee, the Organizing Committee, the Personnel Committee, and the Contract Enforcement Committee. These standing committees exist in Local 5810 in other sections of the bylaws (Elections Committee, Personnel Committee) or by virtue of formation through Joint Council vote. The Amalgamation Committee recommends that all equivalent standing committees be merged and that standing committees established for Local 2865 but not for Local 5810 be retained. The Joint Council should retain the power to establish other committees as needed, including for the purposes of creating unit-specific committees.

Membership Meetings

Both Local Unions maintain nearly equivalent procedures for membership meetings, requiring a once-yearly Statewide Membership Meeting and monthly Membership Meetings at each campus. This structure should be maintained, with agendas for each meeting including unit-specific breakouts as needed. All members from all units will be granted full voting privileges at membership meetings. For campus monthly Membership Meetings, best practice for setting the agenda shall be for the Campus Chairs to meet and jointly determine an agenda. The Campus Chairs should split chairing duties for each membership meeting, rotating who holds the position of primary Chair for each meeting for the purposes of maintaining order and meeting procedure.

The two Local Unions have slightly different processes for calling special statewide membership meetings, namely the threshold for membership meetings to be called by written request of the membership. The Amalgamation Committee recommends that a special membership meeting can be called upon written request by a minimum of 5% of in-unit members in good standing from each campus.

Campus-Level Bodies and Committees

Campuses currently retain discretion to establish campus-level committees as needed and this memo suggests no changes to that discretion. However, in an effort to further integrate the units belonging to Locals 2865 and 5810, the Amalgamation Committee recommends that campus-level bodies and committees be held jointly where practicable. For example, campuses

should maintain all-unit organizing committees regarding matters of joint organization between the units and all-unit contract enforcement committees to identify and pursue shared matters of contract enforcement between the units. This recommendation does not preclude the maintenance of unit-specific committees where desired.

Contract Enforcement

In keeping with the principles outlined in previous sections of this memo, the mechanisms and processes for contract enforcement in the Amalgamated Local Union need not change significantly. Despite Amalgamation, the four units of Locals 2865 and 5810 will continue to retain separate contracts, at least for the original duration of these contracts¹⁵. As such, the mechanisms used to enforce the current contracts – such as potential violation intake via forms made available to the membership and through stewards, oversight of grievances by campus and state-wide contract enforcement committees, and further action organized by members – should remain in place. Since the ratification of new contracts for all four units in 2022, there has already been a marked increase in collaboration between the units in handling contract enforcement matters. Amalgamation provides an opportunity for this collaboration to increase by engaging in further cross-unit education on the particularities of each contract and merging campus and state-wide contract enforcement committees where they are not already merged, as suggested in the Structure section of this memo. Not only will this increased collaboration boost solidarity among the units as the burden of building a better workplace through contract enforcement is increasingly seen as a shared pursuit between units, but increased collaboration will also increase the overall capacity of member-leaders to engage in contract enforcement. Furthermore, the Amalgamation Committee recommends that the Amalgamated Local Union regularly hold contract enforcement trainings for all four contracts at all campuses to train members on grievance handling and other strategies for contract enforcement across all four units.

Currently, the Executive Boards of Locals 2865 and 5810 must vote to appeal grievances from their respective units to arbitration and, in the case of Union grievances, to appeal those grievances to Step 3. In the Amalgamated Local Union, this power for all four units should remain with the Executive Board. As the Executive Board will be made up of members from all four units, this will require Executive Board members to familiarize themselves with all four contracts in order to make informed decisions about appeals in the grievance process. Once again, this will have the benefit of fostering further collaboration and shared responsibility between members and leaders of all four units.

¹⁵ UAW Local 2865 submitted a request for unit modification to the Public Employment Relations Board (PERB) to merge the ASE and GSR units. The UC has objected to this unit modification and the process outlined by PERB is ongoing.

Resources

One of the key questions for the committee was to understand how resource-sharing between locals is currently taking place and what sorts of efficiencies would be possible through amalgamation. This section provides an overview of our current practices related to staff, data, and communications resources and how these could change with amalgamation.

Staff Resources

Staff resources in both locals are divided into four main categories: organizing, data, communications, and administration. Among these, organizing makes up the largest proportion of staff resources. Though each local employs its own staff, the locals share staff resources. This is particularly the case among lead organizers on a campus who are charged with overseeing the organizing program across all bargaining units (i.e. ASEs, SRs, Postdocs, and ARs).

Locals 2865 and 5810 began sharing resources in the lead up to the 2022 contract campaign, understanding that a joint contract campaign would better position all bargaining units to win the strongest contracts possible. As the locals organized toward the contract campaign, it became apparent that staff resources were not being used in the most efficient manner possible. For example, when a 5810 staff organizer did a walkthrough in a lab, they focused only on speaking with 5810 represented employees (i.e. Postdocs and Academic Researchers) even if the lab also employed Student Researchers. This was also the case with 2865 staff organizers. As the contract campaign escalated, the locals began to coordinate staff resources more and cross-train staff organizers to be able to organize all four units.

The cross-unit, coordinated staff model has been very effective, as was evidenced by the 2022 strike. However, it has presented a number of challenges. These range from issues with the reporting structure to differences in pay and benefits. Because staff are employed separately by either of the two locals but are still expected to perform duties for both locals, a clear reporting structure has been difficult to establish. The biggest source of challenges, however, are the two separate Collective Bargaining Agreements between the locals and their staff.

In the past five years, staff unions have been established in each of the two locals. Because the unions for staff members of UAW 2865 and UAW 5810 were established at different times and because there was very little coordination between the two UAW locals until recently, the CBAs have established significantly different salary scales and benefits. These differences turned into inequitable working conditions when the locals began to coordinate resources, as staff organizers from the two locals were performing similar work for sometimes significantly different salaries. Though most of the differences in salary and benefits have been resolved, staff members continue to have two separate CBAs with the potential to diverge again.

Through amalgamation, the two locals would be able to establish one coherent staff structure, reducing the confusion about reporting and differences in working conditions. Under an amalgamated local, staff members would report to just one Personnel Committee and would have just one CBA with the same pay, benefits, and workplace protections. The local would only have to negotiate one contract and staff members would enjoy more equitable working conditions, boosting staff morale.

Data

The two locals use a joint database that was created in 2022 in preparation for the strike. Prior to this, each local had its own database; however, both databases used the same outdated technology that was no longer supported. Because the locals were desperately in need of a new database—especially as the 2022 contract campaign approached—2865 and 5810 decided to jointly invest in creating a new database that could include workers from all four bargaining units represented by the locals. The benefits of creating one database are not just cost savings, but it also makes it easier to conduct cross-unit organizing by making worker information from all units readily available.

The new database is a vast improvement on the old system, but it does require higher technical skills to operate it. Because both locals have been sharing data staff resources, the need for higher technical skills hasn't presented any significant challenges. However, were the locals to discontinue maintaining one database, some significant challenges to operating the system might arise.

Amalgamation would ensure that all four bargaining units continue to use one database, allowing for more efficient use of data resources and giving organizers ready access to worker data across all units. Organizing across all units will be essential to continuing to increase our power at the University of California. Maintaining the current joint database is essential to continuing to have a joint organizing program.

Communications

Local 2865 and 5810 maintain large internal and external communications programs. They maintain an internal email list containing well over 50k recipients and regularly place stories in media outlets both locally and nationally.

To ensure members have access to information, the locals use a number of communications tools, including Mailchimp, Spoke, Jotform, Zoom, Wordpress, and Google Workspace. Because all of these tools were adopted before the locals began to coordinate closely, there are many redundancies. Both locals, for example, have their own Google Workspace and Mailchimp

accounts. These redundancies could be eliminated through amalgamation, resulting in some modest cost savings and fewer staff resources expended to maintain separate systems.

For external communications, both locals use a communications and PR consulting firm. This firm has a proven track record of assisting the locals place stories on local, state, and national media outlets, regularly provides media trainings for members, assists in maintaining the locals' websites, designs visual content, and helps the locals develop their political outreach strategies. Both locals have long-standing separate accounts with the firm, but there has been recently much overlap in the work provided for both accounts. If the locals were to amalgamate, the two accounts would be consolidated, opening the potential for significant cost savings.

Political Programming

Locals 2865 and 5810 have largely overlapping interests (e.g. related to bargaining, immigration policy, housing, science funding, etc.) which are influenced by the political landscape at the state and federal levels. The locals have shared a political staff member, and members of both locals have historically canvassed for pro-labor candidates and lobbied for legislation and policy together. A timely example of this was the joint sponsorship of AB 504, the Picket Line Protection bill in California, a piece of legislation that would allow public sector employees to respect picket lines at their workplace, and an idea following directly from our 2022 joint strike. Since being introduced, dozens of Local 2865 and 5810 members have jointly advocated for the bill during phonebanks and visits to Sacramento. Currently, the Executive Boards of each Local vote independently to support legislation and candidates, though historically, the two EBoards have agreed on nearly all if not all support and endorsements. If amalgamated, the staff support and endorsement process would be more streamlined, avoiding duplicate processes. A larger Local also carries more political power when garnering support from elected leaders for bargaining and legislation.

International UAW Conventions

UAW International conventions happen every 4 years. At the Constitutional Convention each local's delegates vote on amendments to the constitution and resolutions. The Constitutional Convention is where major international union decisions are made. For example, at the last convention members voted to increase strike pay to \$400/week. Each local sends a number of delegates who represent a certain number of votes based on membership size. The Bargaining Convention works the same way and delegates vote on international bargaining priorities (often but not always related to the auto sector).

Both 2865 and 5810 are notified of how many delegates and votes they will have by the international prior to the Convention based on the UAW Constitution Article 8.¹⁶ By default,

¹⁶ UAW Constitution - <https://uaw.org/wp-content/uploads/2019/01/2018-UAW-Constitution.pdf> .

delegates and votes are apportioned within locals based on bargaining unit's paid per capita tax. However, 2865 has previously elected statewide delegates from each campus unit. Up to this point SRs have not been members during a convention and will significantly increase the number of delegates and votes for 2865. If 2865 and 5810 amalgamated they would represent the largest contingent of delegates and votes from any local (the next largest includes around 14,000 members). Each delegate may vote as they see fit but often delegates from the same local/unit will vote in a block on priority issues creating a powerful contingent. If amalgamated our number of delegates and votes may not change significantly but we may have greater symbolic power as one large union.

Bargaining Strategy

A key reason we have decided to explore amalgamation is to examine the consequences it would have on our power at the bargaining table and on our capacity to execute our demands into contractual wins. Amalgamation would require a structural and organizational adjustment, alongside a necessary statewide coordinate contract campaign—of which we are not without practice following our 2022 contract campaign and strike.

Our bargaining strategy depends heavily on our initial bargaining demands and bargaining priorities. As one local, surveying our membership would allow us to identify shared issues that are important to all academic workers. As we saw in our most recent contract campaign issues such as Wages, Parking and Transportation, Housing, Access Needs, and International Scholar Rights were all identified as bargaining priorities for all units. This is likely to be the case in future contract campaigns. In identifying shared bargaining priorities we will be able to mobilize the full extent of our amalgamated membership behind our most important issues--facilitating larger contracts wins in those priorities for all academic workers at UC.

While amalgamated, Academic Researchers, Postdocs, Graduate Student Researchers, and Academic Student Employees will still be able to identify, bargain, and strategize for priorities specific to their membership. Surveying our membership for initial bargaining demands would allow us to target shared priorities in tandem with unit specific priorities (e.g., bridge funding for Academic Researchers, or fee remission for GSRs/ASEs). Issues entirely specific to particular units would still be negotiated as so during bargaining.

As time progresses, GSRs and ASEs will likely have their petition to have one contract accepted. This would result in bargaining for three different contracts--for ARs, PDs, and GSRs/ASEs. Further, amalgamation would require modification to our bargaining team structure to address the composition of the bargaining team and overall voting procedures.

Identity and Aesthetics

Members of Locals 2865 and 5810 share an intense pride in the long history of organizing and workplace democracy fostered by the two Locals, and this pride is symbolized in the identity, style, and aesthetics of the two Local Unions. Local numbers, logos, color schemes, communications styles, and more all play a role in building this pride and creating a recognizable image for external-facing communications. As such, the Amalgamated Local Union should take great care to address questions of identity and aesthetics so as to build upon the legacy of both Local Unions and foster a sense of unity and solidarity in the Amalgamated Local. This section will include some background on the identity and aesthetics of the two Local Unions and provide recommendations for addressing these questions for the Amalgamated Local Union.

Local Numbers

UAW Locals, especially in the Higher Education sector, often choose Local numbers with symbolic importance to the Local Union, as is the case for Locals 2865 and 5810. Local 2865, formed originally via the amalgamation of ASE units at 8 of the 10 University of California campuses in 2000¹⁷, chose its local number to signify the union of ASEs at those 8 campuses and its historical organizing roots in District 65, a worker-led, “catch-all” union¹⁸ that focused its organizing across non-manufacturing sectors and ultimately affiliated with the UAW in 1987¹⁹. Local 5810 followed a similar example in choosing its local number; after the ratification of the first contract for Postdocs at the University of California, the Local Union represented approximately 5,800 Postdocs at 10 University of California campuses. Other relevant examples include UAW Local 4121 at the University of Washington, which chose its local number to symbolize that its organizing model was “for one-to-one” organizing, and UAW Local 5118 at Harvard University, where the National Labor Relations Board certified the Union’s victory in a union election on May 1st, 2018²⁰.

The Amalgamation Committee recommends that the Amalgamated Local Union request a Local number of similar symbolic value as these examples to the International Executive Board of the UAW upon a petition to amalgamate. Suggestions for potential Local numbers with justification are provided below. Furthermore, the Amalgamation Committee suggests that an advisory question be included on the referendum ballot including these suggestions and others at the discretion of the Joint Councils to gauge the preferences of members in selecting a Local number.

¹⁷ UC Merced had not been established in 2000, and ASEs at UCSF did not gain recognition until 2022.

¹⁸ <https://jacobin.com/2016/08/unions-low-wage-service-sector-new-york-labor>

¹⁹ <https://www.nytimes.com/1987/02/26/nyregion/district-65-becomes-unit-of-the-uaw.html>

²⁰ <https://harvardgradunion.org/history/>

* A previously published version of this memo incorrectly quoted the number of Postdocs and Academic Researchers as 6k and 3k, respectively.

Local 65

The Local number 65 can be chosen to pay homage to the historical roots of Locals 2865 and 5810 – and the Higher Education labor movement writ-large – in District 65, the merger of Locals 2865 and 5810, and the Amalgamated Local’s home in Region 6 of the UAW. As described above, organizing efforts at the University of California and in Higher Education more broadly can be traced back to organizers in District 65, which sought to organize beyond the traditional confines of the labor movement. Furthermore, the “6” in 65 can be said to be taken from Local 2865 and the “5” from Local 5810, representing the fact that the Amalgamated Local was born from the merger of those two locals. Finally, the “6” can also stand for our place in Region 6 of the UAW, which was re-formed in 2022, largely due to the efforts of members in Locals 2865 and 5810 to organize new workers into the UAW.

While there does not seem to currently be a chartered Local 65 within the UAW, the Local number was previously used upon District 65’s affiliation with the UAW. Research should be conducted to ensure the availability of this Local number before its consideration.

Local 48, 4810, or 4811

Local 48 can be selected to symbolize the moment most responsible for charting the path towards amalgamation of Locals 2865 and 5810: the 48,000 worker-strong #FairUCNow contract campaign and strike in 2022, the largest strike of academic workers in U.S. history and the first strike of Postdocs and Academic Researchers in the United States. While the number of workers represented by the Amalgamated Local will change with time, the cross-unit struggle of academic workers at the UC in 2022 can be inscribed as a starting point for the Amalgamated Local. The numbers 10 or 11 can be affixed to represent the presence of the Amalgamated Local at 10 or 11 campuses, depending on whether Lawrence Berkeley National Lab should be considered as a separate campus from UC Berkeley.

Local 5865

The Local number 5865 represents the most straightforward merger of Locals 5810 and 2865, taking the first and last two digits of the Local numbers respectively.

Design and Style

The Amalgamation Committee recommends that a style guide for the Amalgamated Local Union be created shortly after the approval of the amalgamation process. This guide should include a new logo for the Amalgamated Local Union, including its Local number, a choice of primary colors to represent the Amalgamated Local Union on graphics, banners, and clothing, and a discussion of general design principles to be used in communications from the Amalgamated Local Union. The suggestions in this style guide should draw heavily from the discussion of the

history, traditions, and outlook of Locals 2865 and 5810 and help to generate a unified identity for the Amalgamated Local Union.

Appendix A: Amalgamation Committee Members

Committee Representatives from Local 5810

The executive board of UAW 5810 has endorsed the following candidates for the amalgamation exploratory committee, described in this [resolution](#). Of the 15 members who self-nominated, the recommended committee was selected on the basis of campus and job title diversity among the self-nominees. Every AR who self-nominated was selected. In the cases where multiple postdocs from the same campus applied, we asked those workers to discuss amongst themselves or sought feedback from other members at their campus to reach a decision. 2865 President Rafael Jaime and 5810 President Neal Sweeney, also served as ex-officio, non-voting members on the committee who provided assistance in answering questions and providing background information for the committee. .

1. Conor White, UC Davis AR
2. Ally Cara, UCLA PD
3. Tom Faust, UCSF PD
4. Layne Jackson Hubbard, UC Irvine PD
5. Mia Villegas, UC Irvine AR
6. Felipe Montealegre-Mora, UC Berkeley PD
7. Vetri Velan, LBL PD
8. Savannah Hunter, UC Berkeley AR
9. Trevor Arp, UCSB PD
10. Sarah Arveson, UAW 5810 Vice President
11. Alejandra Sanchez-Rios, UCSD PD

Committee Representatives from Local 2865

The executive board of UAW 2865 has endorsed the following candidates for the amalgamation exploratory committee, described in this [resolution](#).

1. Tanzil Chowdhury, Lawrence Berkeley National Laboratory
2. Desmond Fonseca, UCLA
3. Ahmed Akhtar, UCSD
4. Anny Vilorio Winnett, UCLA

5. Stratton Georgoulis, UCD
6. Sean Wakasa, UCR
7. Elias Bunting, UCD
8. Emily Weintraut, UCD
9. Julia Finestone, UCD
10. Angel Balam Benítez-Mata, UCI
11. Sarah Schwarz, UCSB

Appendix B: Differences Between Units

Note: Differences considered most important during the amalgamation process are highlighted in yellow

Category	5810	2865
Membership Eligibility	Based on job title.	All grad students can be in 2865 regardless of employment position. Non-grad students can be members based on job title.
Local Executive Officers	One Vice President	Two Vice Presidents: a Northern VP from Berkeley, Davis, Merced or Santa Cruz; a Southern VP from Irvine, Los Angeles, Riverside, San Diego, or Santa Barbara.
Local Executive Officers	Two Members-at-Large, one Postdoc and one AR.	N/A
Local Executive Officers	Three Trustees, with at least one Postdoc and at least one Academic Researcher.	Three Trustees
Elections for Local Officers	Every 3 years in May (2012, 2015, etc.)	Every year in May

Number of Head Stewards per Campus	Each Campus: one more than one Head Steward for each 250 bargaining unit employees on the Campus, or major fraction thereof, and a minimum of two. Each Campus will elect a Campus Chair and a Campus Recording Secretary, who will serve as Head Stewards for the first five hundred (500) bargaining unit employees on the Campus. Head Stewards will be elected by a simple majority of votes cast at the Campus.	One more than one Head Steward for each 200 in-unit members in good standing in the Campus Unit, or major fraction thereof, with a maximum of the number of Head Stewards to which the Campus Unit would be entitled if all individuals employed in the Campus Bargaining Unit were members in good standing.
Number of Stewards per Campus	One Steward for every thirty bargaining unit employees, or major portion thereof, and a minimum of two. Apportionment is at the discretion of the campus, but where possible, Stewards should be allocated by hiring unit. The apportionment of Stewards shall take place simultaneously with membership computation.	At least one Steward for each relevant program or department, at discretion of the Campus.
Bargaining Team	Campus Unit Chairs	Campus Unit Chairs and Recording Secretaries
Elections for Vacancies (except President)	A special election shall take place as soon as possible after an office is vacated.	Offices that become vacant between September 16 and March 15 shall be filled in an April vacancy election. Offices that become vacant between March 16 and September 15 shall be filled in an October vacancy election. In years with regularly scheduled elections, no April special election shall be held.
Concurrently Held Positions	No such bylaw	The only positions which can be concurrently held are: - An Officer position and a position on a Committee - An Officer position and a paid organizing or clerical position within

		the Union.
Eligibility for Elected Office	No such rule	No member may serve as a member of the Executive Board for more than 6 years. No member may serve as a Campus Unit Chair for more than 6 years.
Eligibility for Elected Office	Candidates for non-Executive Board positions must be members in continuous good standing for 45 days prior to accepting nomination.	Candidates for non-Executive Board positions must be members in continuous good standing for 90 days prior to accepting nomination.
Referendums and Recalls	Not applicable	Referendum votes and recall meetings shall not be held during the months of June, July, August, or September. If a valid referendum/recall petition is presented between May 1 - September 2, the vote shall be scheduled for the month of October. Requirements for petition signatures and votes are limited to in-unit members in good standing (i.e., excluding non-in-unit grad students).
Staff	The President, Vice-President, and the Financial Secretary shall be paid as up to a full-time position.	No such bylaw

Category	5810	2865
Membership Eligibility	Based on job title.	All grad students can be in 2865 regardless of employment position. Non-grad students can be members based on job title.
Statewide Membership Meetings	Quorum: 50 people	Quorum: 100 people

Local Executive Officers	One Vice President	Two Vice Presidents: a Northern VP from Berkeley, Davis, Merced or Santa Cruz; a Southern VP from Irvine, Los Angeles, Riverside, San Diego, or Santa Barbara.
Local Executive Officers	Two Members-at-Large, one Postdoc and one AR.	N/A
Local Executive Officers	Three Trustees, with at least one Postdoc and at least one Academic Researcher.	Three Trustees
Presidential Vacancy (Removal or Resignation)	The Vice President will succeed to the Presidency.	The Vice President who received the most votes will succeed to the Presidency. If the two Vice President positions are filled in a non-contested election or if the two Vice President positions are not filled during the same election cycle, the decision of which Vice President shall succeed to the Presidency, shall be determined by highest dues-paying member percentage on their northern/southern campuses for the preceding month. If the Presidency becomes vacant during any month in which any campus is in summer break, then the Vice President with the highest dues-paying member percentage in the preceding April shall succeed to the Presidency.
Grievance Arbitration	The Local Executive Board shall decide upon requests by Campus Chairs and Campus Recording Secretaries whether to advance a grievance to arbitration.	The Local Executive Board shall decide upon request whether to advance a grievance to arbitration.

Number of Head Stewards per Campus	Each Campus: one more than one Head Steward for each 250 bargaining unit employees on the Campus, or major fraction thereof, and a minimum of two. Each Campus will elect a Campus Chair and a Campus Recording Secretary, who will serve as Head Stewards for the first five hundred (500) bargaining unit employees on the Campus. Head Stewards will be elected by a simple majority of votes cast at the Campus.	One more than one Head Steward for each 200 in-unit members in good standing in the Campus Unit, or major fraction thereof, with a maximum of the number of Head Stewards to which the Campus Unit would be entitled if all individuals employed in the Campus Bargaining Unit were members in good standing.
Number of Head Stewards per Campus	The membership of each unit shall be computed twice a year during the months of December and April. In the event that the computation would reduce the number of Joint Council representatives from a Campus, that reduction will not take place until there is a Joint Council vacancy from that Campus or the next recomputation, whichever is first.	Same as 5810, except that a reduction in the number of representatives would only occur at the next JC vacancy; the next recomputation is irrelevant.
Joint Council Quarterly Meeting	No stated requirements for quorum	In order to initiate the meeting, at least 40% of all elected officers, not counting vacancies, must be in attendance, without regard to whether absences are excused. Quorum for Joint Council meetings shall be defined as two-thirds of elected officers present at the meeting, or 40% of all elected officers, whichever is lower. Elected officers who arrive late and are recorded as being present shall be included in computing quorum.
Joint Council Quarterly Meeting	Every member in good standing shall be permitted to be present and observe Joint Council meetings, with the exception of confidential personnel information, membership	No such bylaw

	lists, grievances and legal matters. They shall not be entitled to vote and shall have a voice only when called upon.	
Bargaining Team	Campus Unit Chairs	Campus Unit Chairs and Recording Secretaries
Number of Stewards per Campus	One Steward for every thirty bargaining unit employees, or major portion thereof, and a minimum of two. Apportionment is at the discretion of the campus, but where possible, Stewards should be allocated by hiring unit. The apportionment of Stewards shall take place simultaneously with membership computation.	At least one Steward for each relevant program or department, at discretion of the Campus.
Grievances	All Stewards must attend a Local Union grievance handling training session prior to being the sole representative on any grievance.	No such bylaw
Statewide Committees	Committees at right not included	Standing Committees include: Organizing Committee, Personnel Committee, Contract Enforcement Committee
Statewide Committees	Except for the Bylaws Committee whose members are elected, the Joint Council shall appoint members to other committees.	No such bylaw
Absenteeism	Leaders or Committee members can be removed for missing too many meetings, unless excused for cause by the Local Union Excuse Committee, which is comprised of the members of the Executive Board. The terms for cause will be determined by the Excuse Committee. Members of the Executive Board requesting an excused absence may not serve on	Roughly the same as 5810, but the terms for cause are determined by the Local Union; there is no Excuse Committee.

	the Excuse Committee evaluating that request.	
Elections Committee	2-year term	1-year term
Elections	No such bylaw	Following the setting of the time, place, and manner of an election by the JC or EB, the chair of the Elections Committee shall convene an Elections meeting not less than ten (10) days before any union election. At this meeting, the Committee will determine procedures for the upcoming vote, to be decided by a majority vote. Any subsequent change to these procedures must be approved by a two-thirds vote of the Committee.
Elections for Local Officers	Every 3 years in May (2012, 2015, etc.)	Every year in May
Elections	Notice of triennial elections and the elections of UAW constitutional convention delegates shall be mailed to the last known address of all members in good standing at least 15 days before the election.	No such bylaw
Elections	The deadline for statements of acceptance and candidate statements shall be no sooner than 10 days after the notice for nomination.	The deadline for statements of acceptance and candidate statements shall be no sooner than 7 days after the notice for nomination.
Elections	Nomination acceptances, candidate statements, and protests to an election must be received by the Local Recording Secretary.	Nomination acceptances, candidate statements, and protests to an election must be received by the Local Election Committee.
Elections for Vacancies (except President)	A special election shall take place as soon as possible after an office is vacated.	Offices that become vacant between September 16 and March 15 shall be filled in an April vacancy election. Offices that become vacant between

		March 16 and September 15 shall be filled in an October vacancy election. In years with regularly scheduled elections, no April special election shall be held.
Elections for Vacancies		For special elections, Officers shall assume their roles immediately following the results of the election.
Concurrently Held Positions	No such bylaw	The only positions which can be concurrently held are: - An Officer position and a position on a Committee - An Officer position and a paid organizing or clerical position within the Union.
Elections for Stewards	The membership at each Campus may determine its own election procedures for Stewards. Election for Stewards shall be supervised by a democratically elected Campus election committee. The chairperson of the Campus election committee shall be the Campus member of the Local Union election committee.	No such bylaw
Eligibility for Elected Office	No such rule	No member may serve as a member of the Executive Board for more than 6 years. No member may serve as a Campus Unit Chair for more than 6 years.
Eligibility for Elected Office	Candidates for non-Executive Board positions must be members in continuous good standing for 45 days prior to accepting nomination.	Candidates for non-Executive Board positions must be members in continuous good standing for 90 days prior to accepting nomination.
Referendums	No such restriction	Referendum votes shall not be held during the months of June, July, August, or September. If a valid referendum petition is presented between May 1 - September 2, the vote shall be scheduled for the month of October.

Referendums and Recalls	Not applicable	Requirements for petition signatures and votes are limited to in-unit members in good standing (i.e., excluding non-in-unit grad students).
Recalls	No such restriction	Recall meetings shall not be held during the months of June, July, August, or September. If a valid recall petition is presented between May 1 - September 2, the special meeting shall be scheduled for the month of October.
Budgets and Finance	The President and Financial Secretary can approve expenditures of up to \$1000, and pay ordinary operating expenses of the Local. The President and VP will be reimbursed up to a maximum of \$150 per month for cell phone calls for Union business. A bill will be submitted on a monthly basis for reimbursement.	No such bylaw
Budgets and Finance	Travel policy more carefully detailed in bylaws: hotels, meals, transportation, potential lost time.	Travel policy generally at the discretion of JC and EB
Officer Pay	No such bylaw	JC may allocate a budget for officer pay. Collecting officer pay alone does not constitute employment as Local Union staff.
Staff	The President, Vice-President, and the Financial Secretary shall be paid as up to a full-time position.	No such bylaw
Staff	All service and organizing staff must be UAW members.	No such bylaw
Amendments	See right	Amendment procedure is similar to 5810, but more detail provided in the bylaws about the timeline and the duties of the Bylaws Committee

Statewide Membership Meetings [unimportant]	No such bylaw	Announcements must be distributed by each Campus, in addition to the statewide website.
Campus Membership Meetings [unimportant]	Notice must be provided at least one week in advance by email and on the Local website.	No such bylaw
Joint Council Meetings [unimportant]	No such bylaw	Updates will be provided to the membership following JC meetings: a summary of resolutions, issues, campaigns, or other affairs relevant to the interests of the membership that were discussed at the associated Joint Council meeting. These updates shall be prepared and/or reviewed by the Recording Secretary or their designee(s).
Statewide Committee Meetings [unimportant]	Meeting times and locations will be posted at least seven days prior to the meeting time on the Local Union website.	

Appendix C: Sources from Literature Review on Union Amalgamation and Bulleted List of Findings from Literature

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Why do unions amalgamate?

- To stop or reverse membership losses and financial hardship.
- Achieve economies of scale in operations and to maintain specialized depts (like lobbying, health and safety etc.).
- To reduce operating costs and share resources.
- Provide a better array of membership services (staff assistance, grievance handling).
- Reduce inter-union competition during organizing and bargaining.
- Expand into new membership jurisdictions and increase the breadth of future organizing.
- Counter the bargaining strength of employers (increase bargaining power), especially for employers who have merged or subcontracted.

What are some challenges that locals attempting to amalgamate have faced?

- Members' reluctance to end their local union's history and traditions.
- Members' fears that their interests will be neglected in a large merged union.
- Lack of proactive member engagement and lack of effort to address members' concerns can result in member disengagement and rejection of amalgamation, particularly if amalgamation is perceived as a top-down mandate.
- Lingering hostility between local unions in the case of locals who compete for the same jobs.
- Officers and staff concerns that merger will reduce their compensation and status.
- Irreconcilable differences in union structures and governing practices (especially autonomy granted to union locals and the ways that officers are elected).
- Differing union ideologies or cultures within locals (political party or federation affiliation) can lead to challenges with solidarity and factionalism.
- Symbolic issues (name of the union, titles of officers etc.).
- Union mergers will often not solve problems that gave rise to them. For example, if unions merged because they were having organizing difficulties and wanted to consolidate their power, amalgamating will not solve their need to revitalize their union and organize their members or new members.