

Facilitator Guide

Joint Staffing Booster Kit



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About the booster kit

This guide is designed to support the ILT (instructor-led training), “LMP Joint Staffing Training for Coalition Labor and KP Management” and assumes that participants have completed the ILT training. The booster’s purpose is as follows:

- Refresh key concepts and steps in developing and submitting staffing plans.
- Provide guided activities to help co-leads develop their plans.
- Encourage UBT co-leads to start their staffing plans which are due June 30th.

Booster video

This short, light-hearted video is a quick refresher on the overall process, reminding co-leads of the big picture as they work on their staffing plans. The video can also be used to provide an overview of joint staffing to decision makers and other stakeholders.

Required resource

The main resource for developing the staffing plan is the Joint Staffing Resource Guide.

Overview of recommended activities

Following is an overview of activities you can assemble to meet the needs of your team and the time available for training. **At minimum, you should show the video and share the link to the Joint Staffing Resource Guide (Activity 1).** Beyond that, assemble one or more additional activities as you see fit. All can be facilitated virtually or in person.

#	Activity	Estimated time
1	Booster Video and Resource Guide	5-10 minutes
2	Knowledge Check	5-10 minutes
3	Reflections on Joint Staffing	5-10 minutes
4	Are You Ready?	15-20 minutes
5	Voice of Experience	10-15 minutes
6	Treasure Hunt	10-15 minutes

Detailed instructions for activities

Activity 1: Booster Video and Resource Guide – 5-10 minutes

This required activity can stand alone or be combined with the Knowledge Check. You may also use this first session to assess what other activities best suit the needs of your team.

Preparation

- Make sure you can access and play the booster video.
<https://www.Impartnership.org/how-to-guide/joint-staffing-booster-coalition-labor-and-kp-management>
- Have the link to the Joint Staffing Resource Guide ready to share: [joint-staffing-resource-guide.pdf](#)

Instructions

- Show the booster video and share the link to the Joint Staffing Resource Guide.
- If needed, spend a few minutes answering questions from participants.

Activity 2: Knowledge Check – 5-10 minutes

After watching the booster video, ask participants the following 5 multiple-choice questions to reinforce retention of key information.

Preparation

- For a virtual session, use your preferred polling app to create the multiple-choice questions below.
- If doing an in-person huddle or team meeting, provide the “Knowledge Check” handout.
- Correct answers are shown in bold.

Multiple-choice questions

1. What date is your staffing plan due? Select the best answer. **(Correct answer is b.)**
 - a) August 31st
 - b) June 30th
 - c) December 31st
2. What is the main resource available to help you develop your staffing plan? Select the best answer. **(Correct answer is d.)**
 - a) National Agreement
 - b) Your job description
 - c) Principles of Responsibility
 - d) Joint Staffing Resource Guide

3. In developing a joint staffing plan, which of the following is true as stated in the National Agreement? Select the best answer. **(Correct answer is c.)**
 - a) KP managers or co-leads develop staffing plans for approval by Coalition Labor.
 - b) Coalition Labor co-leads develop staffing plans for approval by KP managers or co-leads.
 - c) Staffing plans must include meaningful participation and input from Coalition Labor.
 - d) Management co-leads can submit a staffing plan without Coalition Labor input if they're not available.
4. Is consensus required before submitting your staffing plan? Select the best answer. **(Correct answer is b.)**
 - a) No, a simple majority vote is sufficient.
 - b) Yes, consensus must be obtained from the unit-based team.
5. Is approval from upper management required before submitting the staffing plan? Select the best answer. **(Correct answer is a.)**
 - a) No, UBTs should focus on objective information (e.g., call volumes vs. available staff) to formulate a staffing model that meets the objective need and not worry about what will or will not be approved.
 - b) Yes, UBTs should ask upper management to approve the proposed staffing model before submitting it using the online tool.

Activity 3: Reflections on Joint Staffing – 5-10 minutes

After learners watch the video, facilitate a group discussion by posing some or all of the suggested reflection questions. You may choose to do several short reflection activities with just 1 or 2 questions each.

Preparation

- Identify how you'll facilitate the activity.
 - Virtual session:
 - Use the slide to show the questions you want to address, modifying the slide if needed.
 - Ask participants to respond in chat or by unmuting their microphones and speaking up.
 - In-person huddle or meetings:
 - Share the questions you want to address using the slide or the "Reflections on Joint Staffing" handout in the Learner Worksheets document. Modify these if needed to show the questions you've selected.

- Ask participants to respond verbally or by taking notes on the “Reflections” handout. You can also ask them to record their ideas on flip charts or a whiteboard.
- Familiarize yourself with the possible answers to each question so you can acknowledge these responses when offered by participants or raise these points yourself if participants are struggling. Remember to be open to additional responses by participants.

Possible reflection questions and example answers

Below are 4 reflection questions with some of the answers or points (in italics) that may come up in the discussion. Choose which you wish to use and modify the slide or handout as needed.

1. What do you think is the most important benefit of working together to create a joint staffing plan?
 - *It can result in more efficient and effective staffing plans.*
 - *Plans benefit from input by staff with lived experience implementing past plans or lack of plans.*
 - *Employees on the front line have critical information that can inform plans that can survive daily circumstances, including unplanned shortages, breakdowns, etc.*
2. Joint staffing planning is still a bit new. What are some workplace practices you already engage in that can help you and your team work together on your staffing plan?
 - *Daily huddles*
 - *Team meetings*
 - *Consensus decision making and interest-based problem solving*
 - *Participants may offer many other practices*
3. Where in the process is it important to gain input from UBT members?
 - *When gathering information in preparation for staffing planning, UBT members may be excellent sources of some of the information.*
 - *During the initial UBT meeting, members may have valuable insights and information.*
 - *UBT members may continue to contribute general or specialized knowledge throughout the process as co-leads meet offline or with the team.*
 - *UBT members can help improve or fine tune the plan as they review and provide consensus.*
4. What additional support do you need to complete your staffing plan?
 - *Access to data*
 - *Help with barriers (escalation pathway)*
 - *Tutor or mentor*
 - *Help with the worksheets or inputting info into online app*

Activity 4: Are You Ready? – 15-20 minutes

This activity is most useful for co-leads or teams that lack experience or confidence in creating staffing plans, or who have expressed a need for a refresher.

Preparation

- Plan to re-play the booster video if it's been a while since participants seen it.
- Decide how you will provide access to the “Are You Ready?” checklist in the Learner Worksheets document: printed copies or link: <https://www.lmpartnership.org/how-to-guide/joint-staffing-booster-coalition-labor-and-kp-management>
- Familiarize yourself with the flowchart and checklist so you can lead a brief walkthrough of the steps.
- Note that the PowerPoint contains a slide with a larger, animated graphic of the flowchart with a script for you to read aloud if you prefer.

Instructions

- If needed, play the booster video.
- Provide printed copies or the link to the “Are You Ready?” checklist.
- Briefly walk through the process flowchart with participants and be prepared to answer clarifying questions about the steps.
- Ask co-lead pairs to work through the checklist and agree on their status for each of the steps as well as at least 2 action items to keep moving forward.
- Reconvene and ask participants to share insights, action items, or questions that came out of the activity.

Activity 5: The Voice of Experience – 10-15 minutes

Invite an experienced co-lead pair that has created a successful staffing plan to share their experience. The purpose is to build co-leads' confidence and competence as they develop their plans.

Preparation

- Meet with the mentor co-leads you invited to share in this activity and walk through the suggested questions below. Decide together which they will address. Feel free to add questions to capture their special insights as appropriate for your team's needs.
- You may keep this discussion informal but consider having someone record or take notes to share in a follow-up email. If virtual, consider using AI to create a summary of the recorded session.

Possible questions for mentors

1. What are some best practices or tips that were most helpful to you as you developed your plan?
2. What were some pitfalls that helped you improve your practices?
3. What words of wisdom or encouragement do you have for us as we tackle this challenging task?

Activity 6: Treasure Hunt – 10-15 minutes

In this activity, we provide a list of information items to find in the Joint Staffing Resource Guide and Joint Staffing SharePoint site.

Preparation

- Decide how you'll provide access to the "Treasure Hunt" handout for this activity: printed copies or link to the handout in the Learner Worksheets document.
- Make sure participants have access to the following:
 - Joint Staffing Resource Guide: Printed copy of the guide or link to the online guide. [joint-staffing-resource-guide.pdf](#)
 - SharePoint site: Link to the site: [LMP Coalition Joint Staffing - Home](#)
 - "Treasure Hunt" handout in the Learner Worksheets document: <https://www.lmpartnership.org/how-to-guide/joint-staffing-booster-coalition-labor-and-kp-management>

Instructions

- Provide participants with the "Treasure Hunt" handout or link and explain the activity.
 - Tell them to note page numbers for items found in the Resource Guide.
 - For items found on the SharePoint site, ask participants to simply note that as the location
- Give participants 5 minutes to work individually or in pairs to find the items in the handout, which are as follows:
 - Link to the online app:
 - To SharePoint site: https://sp-cloud.kp.org/sites/LMPCoalitionJointStaffing?mkt_tok=NzE1LVJJWi05NTkAAAGYBmPthMjGIlPGUVicMkJphIb6k6YKIXwmENI1kJ8nZLnPTBL-LBTQ7Dplr3hyQuuhx0Rw9aTHFKdXgzMeYg
 - Direct to online app: <https://apps.powerapps.com/play/e/default-3f8a7bc4-e337-47a5-a0fc-0d512c0e05f1/a/4b624251-5f44-453f-8cdc-e8555b30b375?tenantId=3f8a7bc4-e337-47a5-a0fc-0d512c0e05f1&sourcetime=1768500106681>

- Steps in the Joint Staffing Process, **Resource Guide pages 5-11**
- Basic dataset to be gathered or provided to each UBT, **Resource Guide page 8**
- Who should participate in joint staffing, **Resource Guide page 13**
- Steps for jointly creating a unit staffing model, **Resource Guide page 26**
- Steps for creating a budget for backfill and planned replacement, **Resource Guide pages 28-29**
- Escalation pathway for removing barriers in joint staffing planning, **Resource Guide page 35**
- The staffing plan you submitted for the previous year, https://sp-cloud.kp.org/sites/LMPCoalitionJointStaffing?mkt_tok=NzE1LVJJWj05NTkAAAGYBmPthMjGjPGUVicMkJphIb6k6YKIXwmENI1kJ8nZLnPTBL-LBTQ7Dplr3hyQuuhx0Rw9aTHFKdXgzMeYg

ACTIVITY HANDOUTS

This section contains the activity handouts for those activities that have them. You can also find the handouts in the Learner Worksheets document, which you may provide to participants.

- Activity 2: Knowledge Check
- Activity 3: Reflections on Joint Staffing
- Activity 4: Are You Ready?
- Activity 6: Treasure Hunt

Activity 2: Knowledge Check

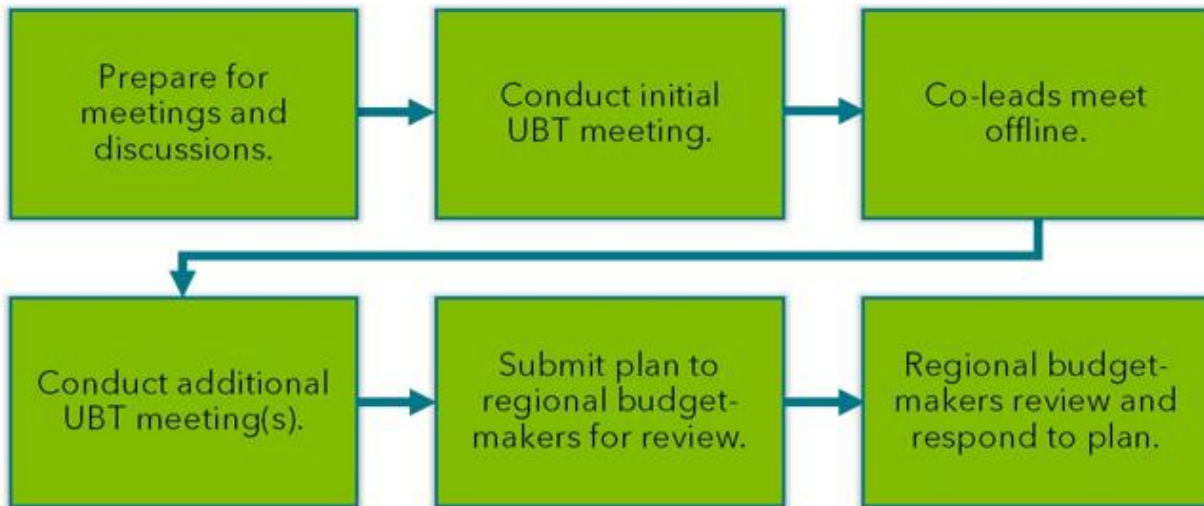
1. What date is your staffing plan due? Select the best answer.
 - a) August 31st
 - b) June 30th
 - c) December 31st
2. What is the main resource available to help you develop your staffing plan? Select the best answer.
 - a) National Agreement
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 - d) Joint Staffing Resource Guide
3. In developing a joint staffing plan, which of the following is true as stated in the National Agreement? Select the best answer.
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 - b) Coalition Labor co-leads develop staffing plans for approval by KP managers or co-leads.
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5. Is approval from upper management required before submitting the staffing plan? Select the best answer.
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 - b) Yes, UBTs should ask upper management to approve the proposed staffing model before submitting it using the online tool.

Activity 3: Reflections on Joint Staffing

1. What do you think is the most important benefit of working together to create a joint staffing plan?
2. Joint staffing planning is still a bit new. What are some workplace practices you already engage in that can help you and your team work together on your staffing plan?
3. Where in the process is it important to gain input from UBT members?
4. What additional support do you need to complete your staffing plan?

Activity 4: Are You Ready?

Process flowchart



Checklist

Work through the following checklist to identify where you are in completing your staffing plan.

- Status: Record whether each step is complete, in progress, or not started.
- Action items: Identify specific actions to tackle next and target deadline dates.
- Notes: Use this column to record whatever is most helpful for you and your co-lead.

Status	Step	Action items	Notes
	Are we ready to start UBT meetings and discussions? <ul style="list-style-type: none"> • Basic dataset gathered? • Additional helpful info assembled? • Meeting space or virtual link, invitations, agenda, etc. 		
	Have we conducted an initial UBT meeting? <ul style="list-style-type: none"> • Did we share initial data gathered by the co-leads? • Did we ask UBT members to share their interests and priorities? 		

	<ul style="list-style-type: none"> • Did we gather info from the team about what considerations to focus on and specific data to look at? • Did we form any subgroups or working groups for specific tasks? • Did we allow time for and collect input from the labor caucus? 		
	<p>Have co-leads and/or subgroups met one or more times to gather additional data and build consensus?</p> <ul style="list-style-type: none"> • Has most or all of the needed data and information been gathered? • Have we rounded with UBT members to discuss their input? • Have we used interest-based problem solving to resolve any areas of uncertainty or disagreement? • Have we populated the staffing plan template using the online app with the information we have? 		
	<p>Have we held additional follow-up meetings as needed to reach consensus within the UBT?</p> <ul style="list-style-type: none"> • Have we followed up on any outstanding questions or comments from previous meetings? • Have we shared any new information? • Have we resolved differences using interest-based problem solving? • Have we reached consensus on the staffing plan – every member of the UBT feels heard and included? 		
	<p>Have we submitted the final staffing plan to regional budget makers?</p>		
	<p>Have we received a response from regional budget makers?</p>		

Activity 6: Treasure Hunt

Find the following information items

- Joint Staffing Resource Guide: Note the page number(s) in the table below.
- Joint Staffing SharePoint site

Find this	Joint Staffing Resource Guide	Joint Staffing SharePoint site
Link to the online app		
Steps in the Joint Staffing Process		
Basic dataset to be gathered or provided to each UBT		
Who should participate in joint staffing		
Steps for jointly creating a unit staffing model		
Steps for creating a budget for backfill and planned replacement		
Escalation pathway for removing barriers in joint staffing planning.		
The staffing plan you submitted for the previous year		

Joint Staffing Resource Guide: [joint-staffing-resource-guide.pdf](#)

Joint Staffing SharePoint Site: https://sp-cloud.kp.org/sites/LMPCoalitionJointStaffing?mkt_tok=NzE1LVJJWi05NTkAAAGYBmPthMjGilPGUVicMkJphIb6k6YKIXwmENI1kJ8nZLnPTBL-LBTQ7Dplr3hyQuuhx0Rw9aTHFKdXgzMeYg