

Appendix C: Facilitating Role Plays

Why use role plays?

Role plays allow trainees to apply new technical knowledge and skills in situations that simulate those they encounter at work, which helps facilitate transfer of learning to the workplace for improved on-the-job performance. Unlike case studies, in which trainees carefully analyze a situation before responding, role plays require trainees to react to situations in the moment when applying technical information and procedures they have learned.

In addition, role plays help facilitate transfer of learning by giving trainees opportunities to:

- Practice in a safe, non-threatening environment where it is permissible to make mistakes
- Work in small groups and observe the facilitator or an experienced trainee demonstrate the provider role, which helps trainees to be comfortable trying out new approaches
- Become confident using job aids and tools to facilitate performance of work tasks
- Receive targeted feedback and support after each time they role-play a provider; such immediate feedback is crucial for trainees to achieve a high level of proficiency and attain workplace performance expectations

Note: Many learning activities in the modules involve brief role-playing. These instructions apply to activities involving multiple role plays conducted in small groups of three trainees.

Preparing for the activity

1. **Read the role-play scenarios.** Carefully review the details on the client and observer information sheets for each role play and become familiar with the key issues. Select the role plays that suit the objectives of your training session and represent situations that are most similar to what trainees will encounter at their workplaces.
2. **Adapt the activity to make it relevant.** If necessary, adapt role plays to make them more consistent with the situations that providers are likely to encounter in their workplace (e.g., type of facility, titles of job aids, cultural practices and names of clients). For example, if most of the trainees work in a hospital, the scenario should reflect this. It is also important to keep the cultural practices of clients in mind. For example, if women tend to come to appointments with their husbands or mothers-in-law, make sure that the scenarios provide for this.
3. **Anticipate and know how to address issues.** Study the relevant technical information in *Family Planning: A Global Handbook for Providers* (CCP and WHO, updated 2018) so that you are ready to address issues that trainees might raise during the role-playing activities. For CHWs, keep explanations simple as well as accurate.
4. **Familiarize yourself with relevant tools and job aids.** Will trainees be practicing using a checklist for screening clients who want to initiate a particular contraceptive method? Will they be working with pages from the counseling tool? Will they share an informational brochure with a new method user? Be prepared to demonstrate proper use of counseling tools or other job aids.
5. **Decide how you will introduce and use the role plays.** If it is the first time that the trainees are taking part in a multiple role-playing activity, conduct a demonstration so that

they become familiar with the expectations related to the roles and support materials. Choose one role play to use for the demonstration. Practice playing the role of the provider and prepare two other facilitators (or trainees) to take on the supporting roles of the client and observer during the demonstration. Also practice explaining how to conduct the role plays. Ensure that there are at least three role play scenarios so that the trainees in a small group will not need to repeat a role play during a round.

- 6. Prepare copies of resources.** Make enough copies of the provider, observer, and client instructions and the role play observation checklist for each small group. Ensure that trainees have copies of the counseling tools or job aid(s).

Conducting the activity

- 1. Introduce the activity using role-play instructions found on the handout.** Emphasize that role-playing provides trainees with an opportunity to apply their new knowledge, skills, and tools in situations that simulate actual client interactions.
- 2. Ask trainees to break into groups of three.** Direct the members of each group to choose who will play the role of client, provider, or observer. Remind the groups that each trainee will play each role during the activity. Distribute copies of the instructions for the client, provider, and observer roles, or create flip charts that describe the general expectations for each role. Review the expectations for each role with the trainees.
- 3. Provide a demonstration.** In addition to showing how the activity is conducted, the demonstration will help trainees feel more comfortable trying out new approaches. Prepare for the demonstration as suggested in item 5 above.
- 4. Distribute role-play materials to trainees taking on the client and observer roles.** Give each “client” a copy of the scenario information sheet that includes the client description and responses to share with the provider. Give the “observer” a scenario information sheet describing the case-specific issues they should watch for and a role play observation checklist. Ask the clients and observers not to share any information about the role play with the person who is playing the provider, except the client’s name, age, and gender.
- 6. Give the groups 15 minutes to conduct the role play.** Circulate among the groups to answer any questions that may arise and provide guidance as needed.
- 7. Instruct each group to discuss the role play.** After the small groups have finished with the role play, ask the groups to take five minutes to talk about what happened during the role play from the perspective of the provider (self-assessment), the client (personal satisfaction with the interaction), and the observer (objective assessment using the Role Play Observation Checklist). The groups should discuss the following questions among themselves:
 - What was going on between the provider and client?
 - What did the provider do in this situation that was effective?
 - What might the provider consider doing differently?
 - How well did the provider attend to the items on the Role Play Observation Checklist and the case specific observations included in the role play description?

Post a prepared flip chart of the discussion questions where each small group can see it, or display the PowerPoint slide that shows these questions. Encourage trainees to provide constructive criticism during their discussions and to take breaks as needed between role plays.

8. **Rotate roles and substitute new role plays.** Trainees should rotate roles within their small groups. If the small groups are each working on different role plays, the groups can pass their role play materials to the next group.
9. **Process the activity.** After the groups have completed three rounds of role plays (each team member has had an opportunity to play each role once), conduct a discussion in the large group using the following questions:

While playing the role of the provider:

- How did it feel to integrate new content, techniques, and job aids into your interaction?
- What worked well? What still feels awkward and requires more practice?
- What did you think about the length of the counseling sessions?
- Did the client raise issues or questions that you did not know how to answer?

While playing the role of the client

- Did the provider adequately address your main reason for coming to the clinic?
- Were you able to understand and use the information the provider gave you?
- Did the provider address all of your concerns?
- Were you comfortable asking questions?
- After being a client, what changes will you make the next time you role-play the provider?

While playing the role of the observer

- Did the provider create a comfortable environment? Did the provider build adequate rapport with his/her client?
- Can you share some examples of interesting interactions and creative solutions that you observed in the role plays?

10. **If desired and time allows, ask the trainees to form new small groups** and complete another set of role plays, using different role-play scenarios and switching roles after the first and second rounds.
11. **After the final round of role-plays** (each team member has had an opportunity to play each role twice), **repeat the large group discussion.** Use the questions in step 9 to conduct another debriefing with the trainees.
12. **Conclude the activity by reminding trainees of the importance of their interactions with clients.** Counseling is an essential component of FP services. When done well, FP counseling sessions can ensure that providers meet the needs of their clients.

Role Play Scenario 1—Client is interested in and eligible for female condoms (can be adapted for male condoms)

Condoms Scenario 1—Client Information Sheet	Condoms Scenario 1—Observer Information Sheet
Client Description You are a 17-year-old female who has been referred for contraception from an HIV care and treatment provider. You were pregnant but miscarried two months ago. You read the pamphlet on family planning method options given to you by the provider and have made a decision about which method you believe best suits your needs. Offer this information <u>only</u> when the provider asks relevant questions: • You have had a steady boyfriend for about six months. • You are both HIV-positive. • Your boyfriend was taking antibiotics recently after he went to see a doctor at the STI clinic. • You want to use female condoms because they would give you some control and you can delay pregnancy for now. • You are not sure how you want to discuss this with your partner. When asked where, when and how, you choose the bench in front of your house, after Friday night dinner; suggesting to your partner that you want to avoid reinfecting each other. • You feel healthy, have no other health problems, and your menses returned to a regular pattern after miscarriage. • You might consider another method in addition to female condoms.	Make note of whether the provider performs these case-specific tasks: • Assesses the client’s reproductive health goals, fertility intentions, life plans • Ensures that the client understood the contraceptive options in the pamphlet, including emergency contraception • After client reveals female condoms as her method of choice, reviews the benefits of dual protection • Provides female condoms and instructions on correct use and resupply • Helps client explore approaches for negotiating condom use; asks client if she would like to role-play the conversation; does role play if client wishes • Offers couples counseling Methods for which the client is eligible: • Male or female condoms • COCs • DMPA or NET-EN • Implants • Standard Days Method®

Role Play Scenario 2—Client is pregnant and wants protection from STIs

Condoms Scenario 2—Client Information Sheet	Condoms Scenario 2—Observer Information Sheet
Client Description You are a 22-year-old woman and you are pregnant. You have come to talk with the provider about condoms, because you want protection from sexually transmitted infections (STIs). Your boyfriend previously gave you an STI, for which you received treatment, and you don't want to risk getting another STI while you are pregnant. Offer this information <u>only</u> when the provider asks relevant questions: • You are interested in using male and female condoms. • You have previously used only male condoms and only a few times. • You have no medical problems. • You feel comfortable talking to your boyfriend about using condoms. When asked where, when, and how, you choose: to talk to him at a local restaurant; over the weekend sometime; and you will insist he use a condom or you will not have sex—for the health of your baby.	Make note of whether the provider performs these case-specific tasks: • Assesses the client's reproductive health goals, fertility intentions, life plans • Provides condoms (male or female condoms, according to the client's decision) and instructions on correct use and resupply • Asks about discussing condoms with partner and helps client decide when, where, and what approach to use for negotiating condom use • Offers couples counseling Methods for which the client is eligible: • Male or female condoms

Role Play Scenario 3—Managing problems with female condoms; negotiating condom use

Condoms Scenario 3—Client Information Sheet	Condoms Scenario 3—Observer Information Sheet
Client Description You are a 20-year-old woman who has never been pregnant. You and your boyfriend have been using male condoms, but he often doesn't have any with him, so you use withdrawal. A few days ago you bought female condoms from a pharmacy. You have had trouble inserting the condoms and something feels wrong when your boyfriend inserts his penis inside your vagina. Offer this information <u>only</u> when the provider asks relevant questions: • You do not want to become pregnant. • You last had sex three days ago and used withdrawal. • Your period is very regular and started seven days ago. • You have no health problems. • You don't want to carry male condoms, because when you previously offered condoms to your boyfriend, he became upset and thought you were sleeping with someone else. • You want to use female condoms because they protect you from STIs and HIV and from getting pregnant. • You might consider using another contraceptive method in addition to condoms, but you are not ready to make a choice today. • You aren't sure how your boyfriend will respond. When asked where, when, how, you choose: in the park, which is very public; Sunday afternoon; because you don't want to get pregnant because you both want to finish school. • You would like the provider to help you practice what you will say to your boyfriend.	Make note of whether the provider performs these case-specific tasks: • Assesses the client's reproductive health goals, fertility intentions, life plans • Rules out pregnancy • Asks about problems with using female condoms • Provides female condoms and instructions on correct use • Demonstrates the five steps, observes client as she practices • Advises on how to improve comfort and increase effectiveness • Reviews benefit of dual method use to ensure protection from pregnancy when partner refuses to use condoms or client does not have condoms handy • Discusses use of emergency contraception in case condom is not used or is used incorrectly • Asks about discussing condoms with partner and asks if client would like to role play the conversation; does a role play practice with client • Provides instructions on resupply and other places to get female condoms Methods for which the client is eligible: • Male or female condoms • DMPA or NET-EN • COCs • Implants • IUD • Standard Days Method®

Role Play Scenario 4—Allergy to latex condoms

Condoms Scenario 4—Client Information Sheet	Condoms Scenario 4—Observer Information Sheet
Client Description You are a 23-year-old married man with one child. You have come to the clinic because after having sex with your wife your genitals became very red and itchy, there were red spots in several other places on your body, and you felt dizzy. Offer this information <u>only</u> when the provider asks relevant questions: • You have no other serious health problems. • Have just started using condoms with your wife, because she does not want another child for a while. • Your wife had previously used a calendar method for FP and you abstained from sex during her fertile days. • You had used a condom just once or twice in the past. • You and your wife are faithful to each other. • You want another child in the future.	Make note of whether the provider performs these case-specific tasks: • Assesses the client's concerns, reproductive health goals, fertility intentions, life plans • Asks questions about his symptoms and condom use and determines latex allergy • Advises client to stop using latex condoms immediately • Assesses STI risk • Advises client on other FP options, including plastic female or male condoms, and suggests he bring his wife in for FP counseling • Provides treatment or refers for treatment of latex allergy. Methods for which the client is eligible: • Plastic male condoms or synthetic female condoms

Role Play Scenario 5—Negotiating condom use (may be adapted for female condoms)

Condoms Scenario 5—Client Information Sheet	Condoms Scenario 5—Observer Information Sheet
Client Description You are an 18-year-old single woman and have come to the clinic for your first general check up. You have recently begun dating someone who you like very much. You know he has had other girlfriends. You don't want to become pregnant or get an STI so you want to talk about using condoms. Offer this information <u>only</u> when the provider asks relevant questions: • You have no health problems. • Two days ago you and your new boyfriend had sex for the first time since you started dating. It was spontaneous and you did not use a condom or any other FP method. • Your period started five days ago; and they are usually very short, but do not come on a regular schedule. • You have not been tested for STIs or HIV, and you do not know if your partner has been tested but many of your friends have tested positive for STIs so you think you would like to be tested too. • You are very worried about getting HIV. • You have had one previous boyfriend who you dated a year ago. He used condoms, but not every time. • You do not feel comfortable discussing condoms with your new boyfriend. • You want children in the future, but not for at least two or three years.	Make note of whether the provider performs these case-specific tasks: • Assesses the client's reproductive health goals, fertility intentions, life plans • After client reveals male condoms as her method of choice, discusses benefits; prevention of pregnancy and protection from STIs and HIV • Suggests testing for STIs and HIV for herself and her boyfriend • Reviews benefits of dual method use to ensure pregnancy prevention in case her boyfriend does not use condoms consistently or client does not have condoms handy • Provides condoms and instructions on correct use and resupply • Discusses use of emergency contraception in case condom is not used or is used incorrectly • Helps client make a plan for discussing condoms with boyfriend and asks if client would like to role play the conversation; does a role-play practice with client • Offers couples counseling Methods for which the client is eligible: • Male or female condoms • Implants • DMPA or NET-EN • COCs

Provider Instructions for Role Plays

Pretend that you are meeting the client for the first time. Ask the client for his or her name, gender (male or female) and age. Pretend that there is a health center nearby to which you can refer the client, if needed. Remember to:

- Assess the client's reproductive health (RH) goals, concerns, and fertility intentions.
- Address the primary and secondary reasons for the client's visit.
- Facilitate the client's decision-making process.
- Integrate information and services related to other RH issues as appropriate.
- Help the client act on her or his decision(s).

Apply your prior experience along with what you have learned from the training and use job aids and tools as appropriate to address the client's concerns.

Observer Instructions for Role Plays

Prior to the start of the interaction:

- Review the Role Play Observation Checklist so that you are familiar with the behaviors that you are observing and where they appear on the checklist.
- Review the case-specific issues on the observer information sheet for the role play.

While observing the interaction between the provider and client, remember to:

- Use the observation checklist to take notes on what happens during the interaction.
- Record how well the provider addresses the case-specific issues in the space provided.
- Be prepared to give feedback to the provider regarding how well he or she addressed the client's needs.

Pay particular attention to whether the provider:

- Helped the client deal with anxiety
- Facilitated communication with a partner
- Allowed the client to make an informed decision
- Ensured that the client met the medical eligibility criteria for the method she chose
- Helped the client carry out her decision

Client Instructions for Role Plays

Prior to the start of the interaction:

- Read the client information sheet and make sure you understand your character's situation.
- Pick a name for your character. Tell the provider your name, age, and whether you are male or female.

During the interaction, offer information *only* when the provider asks relevant questions. Use the information given in your client information sheet to respond to the provider's questions. Feel free to ask questions of the provider.

Role Play Observation Checklist						
Case: _____		Provider: _____		Client: _____		Date: _____
Overall: Communicate Effectively and Maintain Rapport	Yes	No	N/A	Help Client Make an Informed Decision or Address a Problem	Yes	No
Shows respect and avoids judging client				Asks client if he or she has any questions about methods of interest		
Maintains relaxed, friendly and attentive body postures and eye contact				Asks client to choose a method		
Uses simple, clear language				Uses screening checklist to determine if client can use the method		
Uses open-ended and probing questions correctly.....				Agrees on decision or plan in partnership with client		
Listens carefully to client (paraphrases and reflects).....				Provide Assistance to Support Client's Decision		
Asks client about feelings (and shows empathy).....				Gives contraceptive method and condoms for dual-method use, if needed..		
Encourages client participation				Explains and/or demonstrates correct use		
Explains what will occur during visit and procedures				Asks client to explain or demonstrate correct use, and reinforces client's understanding and/or corrects client's demonstration		
Ensures client understanding and corrects misunderstandings				Reminds client about side effects and reasons for returning.....		
Uses job aids appropriately				Gives treatment, supplies, medications (as indicated)		
Offers to involve client's partner				Role plays or rehearses negotiation skills and helps client plan approach.		
Records data according to protocols				Arranges follow-up, resupply, and referral to other services, as needed		
Establish Rapport and Assess Client's Needs and Concerns				Case-Specific Observations or Questions:		
Greets client appropriately .....				.....		
Ensures confidentiality and privacy and that client is comfortable .....				.....		
Asks about reason for visit .....				.....		
Asks about client's partner(s), children, family, sexual behavior, health .....				.....		
Asks about plans to have children, desire for FP (e.g., spacing, limiting)..				.....		
Explores STI risk and what client does to avoid STIs .....				.....		
Identifies areas to evaluate during physical exam (if indicated) .....				.....		
Provide Information and Options Related to Client's Concerns				.....		
Advises on preventing STIs (i.e., abstain, fewer partners, use condoms)				.....		
Advises on achieving desired pregnancy as safely as possible.....				.....		
Explains benefits of FP and healthy spacing .....				.....		
Helps client identify FP methods suited to her or his needs .....				.....		
Gives information on FP methods of interest .....				.....		
Responds to other client questions or concerns .....				.....		