**SOGI and READLD Train the Trainers role-playing exercise guide**

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## Intro

Role-playing is an extremely useful training technique which allows participants to model, practice, and reflect in an adaptable, generally low-stakes, and imaginative applied learning environment. Role playing may be especially useful in alleviating anxieties about new tasks which have a socially interactive component. This document is a guide through five steps for running a role playing training exercise. It provides three different examples to illustrate each step. However, these specific examples may be more or less useful for the particular needs of your organization, so consider them as points of departure for you to adapt to your own trainees' and organization's needs.

In order to lead a role playing exercise the following steps are critically useful:

1. Setting & communicating the objectives of given role play exercises
2. Defining the context in which the imagined roles will be played
3. Clarifying the roles which participants will play
4. Role playing the scene
5. Debriefing for all participants to reflect and provide feedback

## Step 1. Setting & communicating the objectives

In a training context, role playing training exercises benefit by tying them to specific objectives. For example, here are objectives for three different SOGI (and READLD) Train the Trainers role playing exercises:

1. The goal of this exercise is to practice and learn about asking OHA's SOGI questions in order to gain familiarity and comfort with asking them. [Rough estimates on expected time: Steps 1–3: 10 minutes. Step 4: 10 minutes. Step 5: 10 minutes. Total: 30 minutes.]

2. The goal of this exercise is to practice and learn about OHA's SOGI Glossary in order to gain working expertise with relevant language. [Rough estimates on expected time: Steps 1–3: 15 minutes. Step 4: 20 minutes. Step 5: 10 minutes. Total: 45 minutes.]

3. The goal of this exercise is to practice communicating why to adopt and implement OHA's SOGI data standards in your organization in order to effectively champion SOGI demographic data use. [Rough estimates on expected time: Steps 1–3: 10 minutes. Step 4: 20 minutes. Step 5: 10 minutes. Total: 40 minutes.]

## Step 2. Defining the context

As a trainer leading a role play you will need to 'set the scene' for any given exercise (whether or not you will directly participate in it). Here are three examples corresponding to the objectives above.

1. For this exercise, we will imagine a phone call between a patient and the assistant preparing them for a provider visit.

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2. For this exercise, we will pretend to be three providers who are colleagues working at the same clinic having a meeting to discuss how their patients' sexual orientations can relate to and affect the quality of the provider-patient relationship.

3. For this exercise, we will imagine we are a clinic's director unclear on the value of using SOGI data, and the clinic's SOGI data champion having an informal conversation in a break room.

**Step 3. Clarifying the roles**

Notice that in each of the contexts above there are cues about roles: providers, a patient, a clinic's director, and a SOGI data champion. Depending on the existing comfort and skills of the participants those cues may be enough, or a trainer can provide more detailed information about each role. Continuing with the same three exercise examples:

1. For the person playing the patient, imagine you are an older cisgender and heterosexual woman who is mostly unfamiliar with language that is not about heterosexual experiences and cisgender and binary gender experiences (you are not hostile, just unclear on language about sexual minority and gender minority experiences).

   For the person playing the assistant, you are responsible for asking SOGI and REALD questions as part of your new patient visit preparation. [This participant will have the REALD & SOGI questions at hand which you have prepared ahead of time.]

2. For the person playing provider Alex, pretend you are used to thinking of sexual orientation in terms of straight versus gay, and largely in terms of monogamy-orientation. You are unfamiliar with many of OHA's SOGI terms for sexual orientation. You are heterosexual, married long term, and monogamous. You have questions!

   For the person playing provider Blair, pretend you are used to thinking of sexual orientation in terms of straight, gay, and bisexual. You are aware that sexuality is fuzzy and can change over time, and recognize monogamy, non-monogamy, and polyamory. You are a little aware of asexuality, but may not have savvied its nuances (e.g., aromantic versus asexual, demi-sexual, etc.). You have not thought much about how gender diversity or about how race and ethnicity intersect with sexual orientation. You are a white, middle age, cisgender gay man with a long term partner.

   For the person playing provider Charlie, pretend you are a bright-eyed and bushy-tailed champion of OHA's SOGI data standard. You are also relatively young compared to Alex and Blair, and you are already familiar with many of the terms in the OHA SOGI Glossary, and are confident learning them can help your clinic. Decide what your sexual orientation is before starting the role play (and any other lived experience), and let that inform your conversation.

3. For the person playing the director, pretend you are new to the job. While you are aware that OHA has a SOGI data standard, you aren't really familiar with it, and you are uninformed about why it matters for your clinic specifically.

   For the person playing the SOGI data champion, you are confident in the usefulness of OHA's SOGI data both for your organization in a direct sense, and for Oregonians in general.

Notice that for each of these exercises, one of the roles already has confidence and familiarity with OHA's SOGI data standard. That could be an opportunity for one of the participants to practice

confidence (and this may also require some advanced preparation for you or for them), or it could be an opportunity for you as the trainer to play a role.

When role playing, sometimes a person assigned a role may intentionally want to alter it. For example, in the first exercise, the participant assigned to play the older woman may want to instead play a man, or to play an older woman who is specifically in a rural context, or something else. You could invite participants to communicate these ways of 'owning the role' by asking "Does that work for you?" when assigning and clarifying roles before the role play starts. Also explicitly guide participants that if they are playing a role outside of their own lived experience, to do so with respect and dignity.

**Step 4. Role playing the scene**
As a trainer you will arbitrate role playing sessions, even if you are not participating in a someone playing a role. Keep in mind:

- You will take your trainees through Steps 1–5, including indicating when to start the role play, and when a particular role play has concluded (i.e. when you feel the objective has been met).
- Let role playing happen: you and your trainees will learn through the process itself, including if unexpected things come up. Do not invest too much in ideas about how it is supposed to go ahead of time.
- Role playing can be emotional: make space for people to take care of their needs. As one example, if someone plays a confrontational or a hostile role within the context of the exercise, their fellow trainees playing a different role may experience an emotional response to that hostility (as may anyone else present, including you!).

**Step 5. Debriefing**
The debrief following a role play allows participants and the trainer (and possibly observers) to assess whether they met the exercise's objective, to articulate what they learned in the process (regardless of how that relates to the exercise's objective), to identify areas for further role play or investigation, and possibly to provide guidance. Here are ideas for prompting questions that could follow the three example role playing exercise examples:

1. Did this exercise help you feel more confident in asking SOGI questions?
   What did you notice about yourself or the other participant in this exercise?
   What are some changes we could make to the roles if we run this scene again?

2. Did this exercise help you practice and learn about OHA's SOGI terminology?
   Did this exercise help you feel more confident using the OHA SOGI Glossary?
   What came up for you during the exercise?
   How could we adapt this scene to be more relevant or to be relevant to a different part of our organization?

3. Did this exercise help you feel more practiced at communicating why to adopt and implement OHA's SOGI data standard in your organization?
   What did you notice during the exercise?
   What is a way to play a scene similar to this we could adapt to your organization?

All three example debriefs included:
1. A question(s) specifically assessing whether the exercise's objective was met.
2. Open-ended opportunities for participants to share their observations, feelings and experiences.

3. Questions for how to adapt the role playing exercises for further role play: adaptability is one of the great things about role playing! You can adapt the specifics of an objective, the context of a given exercise, and the clarification of roles both to build on past exercises, or even the amount of time it would reasonably take to play through a scenario, but also to cater to the needs of your organization in advance.

There are no 'wrong answers' when giving feedback! What participants learned, noticed, or what ideas they have for future exercises are simply the experiences they had with a given role play. It may be worthwhile for you as the trainer to take notes and keep a journal of role play sessions in order for you to develop trainings you give as you grow into your role as SOGI (and READLD) champion, and also for you to be able to share insights with your colleagues who are also trainers.

What has not yet appeared in the example debrief questions is feedback to specific participants. For example, if during the first exercise you notice the participant playing the role of the assistant making a mistake in asking a SOGI question you might want to give notes. You are encouraged to decide ahead of time that any particular role play exercise will or will not involve this kind of feedback. Be sure to communicate before the exercise starts whether constructive feedback to specific participants will be expected at the end of the debrief. Save feedback until after participants have had the opportunity to weigh in on whether the objective was met, and on what they noticed in an open-ended sense. Feedback may or may not be useful before questions about adapting an exercise to a future role play.

***Making role playing scenarios uncomfortable***

One of the ways role playing can be especially useful is in helping participants gain confidence in navigating difficult or uncomfortable situations, and for confronting anxieties about what could happen. Consider:

1. The patient is not just unfamiliar with language for sexual minorities or gender minorities, but is actively 'phobic and hostile.

2. Alex believes acknowledging identities outside if cisgender, gender binary, and heterosexual is not in alignment with their religious practices, and not relevant to clinical practice.

3. The director proposes to <u>not</u> implement OHA's SOGI data standard during a monthly all-hands work meeting specifically because this will "keep us off the radar of the current administration."

Uncomfortable role playing scenarios and roles can be useful, even though they may be unlikely to be daily experiences. Be thoughtful about the objective of an uncomfortable scenario, and be sure to discuss and plan with your trainees about how to run such scenarios ahead of time.