

# PM+ Role Play Instructions and Scripts for Helper and Actor-Clients

This document includes standardized instructions and a version of role play scripts for PM+-based structured role-play assessments to be paired with the EQUIP Problem Management Tool. The character background and actor prompt checklist should be adapted to the local context and experiences of the local setting. More information on adaption is below.

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## Parts of the role play instructions and scripts

1. **Preparing the Helper for the role play:** This step is crucial. Be sure to talk with your Helper to explain the overall process. Sample steps and script are below:

*“Welcome to your Helper role play! In this role play, you will pretend to be a Helper supporting a person who may need your help. This role play is a great way to practice your skills, and it is a chance for us to see your strengths. We don’t expect to be able to see all your skills in 10 minutes. Therefore, we’ll give you instructions that outline the areas you can focus on.*

*Your PM+ role-play has two parts. The first part will be 10 minutes. It will focus on PM+ Session [#, eg 2], [Name of PM+ Strategy, eg Managing Problems]. After 10 minutes, we’ll end the role-play. We will take a short 1-minute break [with the camera off, if remote]. During the break, you can read the instructions for the second part and ask any questions as needed. Then, we will begin the second part, where we will focus on Session [#, eg 4]. We will end after 10 minutes.*

1. **Instructions for the Helper:** These instructions can be adapted to the competencies you want the Helper to show.
  - a. *Provide these instructions to your Helper before the role play begins. You may let the Helper read on their own, or someone may read the instructions to them. The Helper should read these instructions before meeting the person-actor.*
  - b. *If conducting this role-play remotely, you may also send the instructions ahead of time via email.*
2. **Person-Actor Narrative:** Actors should rehearse prior to the formal assessment role plays. The actor should have enough time to practice the character, the actor prompts, and ask any questions or make changes as needed to feel comfortable. This set of instructions has 3 parts:
  - c. **Instructions for the Person-Actor:** These instructions have four steps.
  - d. **Distressed narrative, character background:** Each narrative is a description of the pretend client’s background, including name, age, gender, location, brief description of current situation and current or past concerns.
  - e. **Actor prompt checklist with key concerns (Optional):** This is unique to each role play narrative, it is optional tracking document. It is in a table format.
    - i. **Actor prompts:** Includes prompts that the person-actor should use with the Helper during the role play. Pay special attention the prompts that are only actor-led. These prompts will cue the Helper on what skill we’re looking for. Other prompts are Helper-led. They are actor-client responses to something the Helper says or asks.  
*Note:* As each Helper is unique, not everything is scripted for the person-actor. The person-actor should feel comfortable to carry along with the Helper, while ensuring the actor-led prompts are used at some point in the role play.
    - ii. **Topic:** Each prompt is linked to a corresponding tool item for tracking purposes. These topics can be adapted to fit the competency tool items you want to observe with the Helper(s).
    - iii. **Prompt details:** This is optional. It is to help track whether the actor used a prompt and the number of times it was used. This can be filled out after the role plays either by the actor, person rating or other. If the role play is being recorded (audio or video), the checklist can be filled out at a convenient time.
    - iv. **Notes:** An extra space to take notes as needed.

Welcome to your Helper role play! In this role play, you will pretend to be a Helper supporting a person who may need your help. This role play is a great way to practice your skills, and it is a chance for us to see your strengths. We don't expect to be able to see all your skills in 10 minutes. Therefore, below are instructions that outline areas you can focus on.

Please follow the instructions below.

## PM+ Instructions for Helper (Choosing and defining problems)

Pretend you have completed Session 1 of PM+ with your client, Sam. During that session, you discussed some problems Sam is having such as feeling exhausted, getting in arguments, and struggling to find work.

In this role-play, you will begin working with Sam on Session 2. **Help Sam list problems, and then define a problem to work on** (Steps 1 and 2 of Managing Problems strategy).

Pretend you have already

- ✓ Greeted Sam
- ✓ Completed the weekly assessment

In 10 minutes, your role is to list and choose problems with Sam, then work with Sam to define a problem. You do not have to do any other problem management steps after defining the problem. Please begin the role play by discussing with Sam the problems she mentioned having (feeling exhausted, getting in arguments, and struggling to find work)

## Instructions for Actor-Client (Choosing and defining problems)

- a. **IF/WHEN** the helper asks about what is going on/how things are going, mention: *“Well, I’m still at the homeless shelter. I don’t have my own place. I need to find a job but it’s so hard to get out of bed and apply every day. I keep getting rejected or don’t hear anything back after I apply. I’m on the waiting list for rental assistance but I need to show I am making some income. It will never happen. And I don’t sleep anymore, even though I am so tired. I always feel on edge, and when I do sleep, I will wake up from stress dreams.”*
- b. Work the helper to define a problem focusing on struggling to apply to jobs. You used to apply to jobs every day, but now maybe only once a week. Tell the helper, “I used to be really productive when I was employed, now I’m lazy and useless, I can’t even get energy to apply to one job a week!”
- c. **IF/WHEN** the helper asks, ‘what does productive look like’, tell them “Being employed.” If asked again, tell them “At least applying to 1 job a day.”

### Distress Narrative 1: Actor-Client background

***Note:** Please do not read this to the Helper. They are only for the actor and give information on the background and needs of the pretend person using services, to help the actor feel comfortable and confident in their role as a pretend person using services.*

You are Reese. You are 34 years old and living in Queens, NYC. You have a family of 2 – you and your daughter. You have been in COVID-19 lockdown for over two months. You work part-time as an administrative assistant (during mom hours), but since lockdown it has been difficult to keep up with work since your daughter is home too. Your daughter, Lily, is in fifth grade (she is 12 years old). She does online classes on her tablet, but you need to be there to help her with her activities and homework. It’s been difficult homeschooling her and keeping up with your work tasks. You’re working remotely, but you’ve been working less hours and because you are paid hourly, you’re making less money. Lately, you have had to call out of work because you couldn’t bear to try. You are worried that your boss will replace you with someone who can keep more hours. When you are working, it is difficult for you to stay motivated. There is so little time and you’re working from home with barely any space from your daughter—it’s too much! Your entire body feels painful, and you have had a lot of backaches lately. You feel so irritated, and you are losing sleep. Your daughter Lily is great, but you two have been wearing on one another and it’s difficult to get space. She really wants to see her friends. The parks have been opening, but you are too afraid that she will catch coronavirus, who knows how safe her friends are being. You used to find time taking care of your balcony plants, the tomatoes and basil and such. But you’re so tired all day and night, you often forget you even have plants! You’re feeling lonely. You don’t have any time to catch up with friends. Your sister calls sometimes, but it seems like she is always nagging you. When you remember to water your plants, you notice the last few times how green your basil plant still is, even though you’re not watering it as often. It feels silly, but sometimes you think maybe you could be that strong and get through this. But you’re so exhausted, and each time you try to make up for your work hours, you fail.

**ACTOR PROMPT CHECKLIST: NS-NYC PM+ Role-Play (Choosing and Defining Problems)\***

TOPIC	ACTOR PROMPTS	NOTES	PROMPT DETAILS
<p><b>Listing and choosing problems</b></p>	<p>1. When the helper asks about what’s going on, mention: <i>“Well, I’m still at the homeless shelter. I don’t have my own place. I need to find a job but it’s so hard to get out of bed and apply every day. I keep getting rejected or don’t hear anything back after I apply. I’m on the waiting list for rental assistance but I need to show I am making some income. It will never happen. And I don’t sleep anymore, even though I am so tired. I always feel on edge, and when I do sleep, I will wake up from stress dreams.”</i></p>		<p><input type="checkbox"/> <b>Correctly done</b>-provided reason when asked</p> <p><input type="checkbox"/> <b>Incorrectly done</b>-provided reason without being asked</p>
<p><b>Defining the problem</b></p>	<p>2. Work the helper to define a problem focusing on struggling to apply to jobs. You used to apply to jobs every day, but now maybe only once a week. Tell the helper, <i>“I used to be really productive when I was employed, now I’m lazy and useless, I can’t even get energy to apply to one job a week!”</i></p> <p>3. If the helper asks what productive looks, tell them <i>“being employed.”</i> If asked again, tell them <i>“At least applying to 1 job a day.”</i></p>		<p><input type="checkbox"/> <b>Correctly done</b>-provided reason when asked</p> <p><input type="checkbox"/> <b>Incorrectly done</b>-provided reason without being asked</p>

\*Checklist is optional to use

Welcome to your Helper role play! In this role play, you will pretend to be a Helper supporting a person who may need your help. This role play is a great way to practice your skills, and it is a chance for us to see your strengths. We don't expect to be able to see all your skills in 10 minutes. Therefore, below are instructions that outline areas you can focus on.

Please follow the instructions below.

## PM+ Instructions for Helper (Get going keep doing, Strengthening social support)

Pretend you have already completed Session 2 of PM+ with Sam. During that session, you learned about how difficult it has been for Sam to do much other than be in bed or go to the required classes and meetings at the shelter. You also recall Sam mentioning feeling lonely and sometimes afraid at night, but she wasn't sure who to call and would like to explore options for strengthening social support.

In this role-play, work with Sam on two PM+ components:

1. *Get Going Keep Doing*: **help Sam plan steps for doing an activity** (e.g., go for a walk) and
2. *Strengthening social support*: **help Sam brainstorm a community or other social resource to reach out to, and plan times when it might be most helpful to use the resource.**

Pretend you have already:

- ✓ Greeted Sam
- ✓ Completed the weekly assessment
- ✓ You know an activity you could work on for Get Going Keep Doing: going for walks
- ✓ You have thought of a local community resource (e.g., pick something like free online yoga once a month, going to YMCA, learning about a hotline)

In 10 minutes, your role is to review Sam's activity (going for a walk). Work with Sam to define this activity and plan steps for the week to try it. Afterward, explain to Sam the concept of strengthening social support. Then work with Sam on a plan to contact a suggested social support.

## Instructions for Actor-Client (Get going keep doing, Strengthening social support)

- a. IF/WHEN the helper asks you about walking or an activity, say, ‘**yeah, walking, or yeah, something to help me feel less exhausted.**’
- b. IF/WHEN the helper asks when you want to walk, say, “**I want to go for a walk twice a day for an hour.**”
- c. At some point during scheduling an activity, tell the helper, “**Sometimes an alarm works, but I also hit snooze on my phone.**”
- d. IF/WHEN the helper asks who you can depend on, struggle a bit (e.g., “**mmmm...maybe my friend...we don’t talk as much but maybe?**”)
- e. IF/WHEN the helper asks about local organizations to help with, say, “**Do you mean like a suicide hotline [or] do you mean the people at the homeless shelter?**”
- f. IF/WHEN the helper begins to schedule a time when you will call the identified social support, say, “**I will never remember this number or information!**”

### Distress Narrative 1: Actor-Client background

*Note: Please do not read this to the Helper. They are only for the actor and give information on the background and needs of the pretend person using services, to help the actor feel comfortable and confident in their role as a pretend person using services.*

You are Reese. You are 34 years old and living in Queens, NYC. You have a family of 2 – you and your daughter. You have been in COVID-19 lockdown for over two months. You work part-time as an administrative assistant (during mom hours), but since lockdown it has been difficult to keep up with work since your daughter is home too. Your daughter, Lily, is in fifth grade (she is 12 years old). She does online classes on her tablet, but you need to be there to help her with her activities and homework. It’s been difficult homeschooling her and keeping up with your work tasks. You’re working remotely, but you’ve been working less hours and because you are paid hourly, you’re making less money. Lately, you have had to call out of work because you couldn’t bear to try. You are worried that your boss will replace you with someone who can keep more hours. When you are working, it is difficult for you to stay motivated. There is so little time and you’re working from home with barely any space from your daughter—it’s too much! Your entire body feels painful, and you have had a lot of backaches lately. You feel so irritated, and you are losing sleep. Your daughter Lily is great, but you two have been wearing on one another and it’s difficult to get space. She really wants to see her friends. The parks have been opening, but you are too afraid that she will catch coronavirus, who knows how safe her friends are being. You used to find time taking care of your balcony plants, the tomatoes and basil and such. But you’re so tired all day and night, you often forget you even have plants! You’re feeling lonely. You don’t have any time to catch up with friends. Your sister calls sometimes, but it seems like she is always nagging you. When you remember to water your plants, you notice the last few times how green your basil plant still is, even though you’re not watering it as often. It feels silly, but sometimes you think maybe you could be that strong and get through this. But you’re so exhausted, and each time you try to make up for your work hours, you fail.

**ACTOR PROMPT CHECKLIST: NS-NYC PM+ Role-Play (Get Going Keep Doing, Strengthening Social Support)\***

TOPIC	Prompt Type	ACTOR PROMPTS	NOTES	PROMPT DETAILS
Scheduling activities and tasks	Helper-led	1. When the helper asks you about walking or an activity, say, <b>'yeah, walking, or yeah, something to help me feel less exhausted.'</b>		<input type="checkbox"/> <b>Correctly done</b> – holds head when speaking of troubles <input type="checkbox"/> <b>Incorrectly done</b> – does not hold head when speaking of trouble
	Helper-led	2. When the helper asks when you want to walk, say, <b>"I want to go for a walk twice a day for an hour."</b>		<input type="checkbox"/> How many times was this prompt used? (circle response):  <p style="text-align: center;">0   1   2   &gt;2</p>
	Actor-led	3. At some point during scheduling, tell the helper, <b>"Sometimes an alarm works, but I also hit snooze on my phone."</b>		<input type="checkbox"/> <b>Correctly done</b> – speaks in low tone of voice <input type="checkbox"/> <b>Incorrectly done</b> – speaks in regular tone of voice or loudly
Strengthening Social Support (Item 5)	Helper-led	4. If/when the helper asks who you can depend on, struggle a bit (e.g., <b>"mmmm...maybe my friend...we don't talk as much but maybe?"</b> )		How many times was this prompt used? (circle response):  <p style="text-align: center;">0   1   2   &gt;2</p>
Strengthening Social Support (Item 5)	Helper-led	5. If/when the helper asks about local organizations to help with, say, <b>"Do you mean like a suicide hotline [or] do you mean the people at the homeless shelter?"</b>		How many times was this prompt used? (circle response):  <p style="text-align: center;">0   1   2   &gt;2</p>
Strengthening Social Support (Item 5)	Helper-led	6. If/when the helper begins to schedule a time when you will call the identified social support, say, <b>"I will never remember this number or information!"</b>		How many times was this prompt used? (circle response):  <p style="text-align: center;">0   1   2   &gt;2</p>

\*Checklist is optional to use