

## ROLE-PLAY EXERCISE: EXPLORING WHAT MATTERS MOST

*For use in the ACP Core Component Course for Facilitator Certification*

### Role-Play Instructions

This is an unfolding role-play of a conversation to demonstrate progression through the Exploration phase. With each new rotation, the next Facilitator continues the conversation where the prior Facilitator left off.

- Work in groups of three. Rotate through the roles: Facilitator, individual, and healthcare agent. (*Role-play can be completed in groups of two by eliminating the role of agent.*)
- Each course participant must rotate in the role of the Facilitator.
- Review the information for your respective role with each role-play rotation.
  - The Healthcare Agent role will use the general information on the following page for all rotations.
- Use the **Learning Tool: Exploration Phase of Advance Care Planning (ACP) Conversations (RC 0125)**.
- When instructed/time ends, stop role playing, debrief using the guidelines below, switch roles, and continue the conversation.

### Debrief Guidelines

At the end of each role-play exercise rotation, take 1–2 minutes to *briefly* provide feedback to the Facilitator on the following:

1. **Did the Facilitator use the Learning Tool?** Yes / No / Most of the time
2. **Give 1–2 examples from the following list of communication skills and critical thinking used to individualize the conversation and promote more discussion.**
  - Explore meanings of words/phrases
  - Paraphrase/clarify
  - Ask, “Anything else?”
  - Listen for and summarize themes
  - Affirm/reaffirm purpose of conversation
  - Verbalize empathy
  - Use Ask-Teach-Ask/Teach-Back technique
  - Remain value-neutral
  - Pay attention to non-verbal communication
3. **Give an example of a missed opportunity, if applicable.**

***After debriefing, switch roles and move on to the next role-play rotation to continue the conversation.***

## Role of Healthcare Agent, *if present*

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You are willing to be the healthcare agent of a 67-year-old individual living with heart failure and diabetes. You are supportive and committed to helping your loved one. You agree to honor their decisions.

**Ad lib responses, *as appropriate*.** You may add on to the discussion to make it interactive. Avoid complex responses. You may use some of the themes listed below:

- You worry that others may have a hard time accepting the healthcare decisions your loved one makes.
- You want to know more about the progression of the medical condition and potential complications.
- You have noticed your loved one seems sadder since it's harder to do their usual activities.
- You are concerned about your loved one's comfort as the illness progresses and the need for more support.

## ■ ROLE-PLAY ROTATION 1

### Role of Facilitator

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You are meeting with a 67-year-old individual living with heart failure and diabetes. One month ago, the patient was in the hospital for shortness of breath and leg swelling. Upon discharge, referrals for oxygen and home meal delivery were made. An advance directive document has not been completed, and the chosen healthcare agent is present for this meeting.

1. Use the **Learning Tool: Exploration Phase of ACP Conversations**.
2. Facilitate sections 1, 3, and 4 (skip 2 when agent is present) in the Learning Tool.
  - 1. Introduce and explore understanding of advance care planning (ACP); identify fears or concerns
  - 3. IF AGENT PRESENT—Assess understanding of healthcare agent role
  - 4. Explore “living well” and listen for themes that help the individual express what is important to live well or give life meaning
3. Listen to the role-player's responses. Use the skills on the Communication Skills card and apply critical thinking to individualize the conversation and promote more discussion.
4. Now, set this role-play packet aside. You will only need the Learning Tool to engage the role players.

## Role of Individual Living with Chronic or Serious Illness

You are 67 years old and have been living with heart failure and diabetes. You live alone and family/friends help with shopping and housekeeping. You have a positive attitude. You are interested in completing an advance directive document and have chosen your healthcare agent.

You were in the hospital recently for shortness of breath and leg swelling. You were given referrals for home oxygen and home meal delivery.

**Focus your responses to the Facilitator’s questions.** Ad lib your responses. You may use the following suggested responses for specific questions. Provide one response at a time to keep the discussion interactive. Avoid complex answers.

When Facilitator asks:	Suggested responses:
“Tell me what you understand about this type of planning.”	<ul style="list-style-type: none"> <li>• “I think this is planning for a time when I am older and sicker.”</li> </ul>
“What fears or concerns, if any, do you have about this type of planning?”	<ul style="list-style-type: none"> <li>• “How do I know what I want for something that may happen in the future?”</li> <li>• “What if I change my mind?”</li> </ul>
“Can you tell me what you now understand about ACP?”	<ul style="list-style-type: none"> <li>• <i>[Ad lib response.]</i></li> </ul>
“What questions do you have about the role of the healthcare agent?”	<ul style="list-style-type: none"> <li>• “Can my agent make decisions for me when I am in the hospital?”</li> </ul>
“What does ‘living well’ mean to you?”	<ul style="list-style-type: none"> <li>• “It means I can still get around, visit with my friends and family, and have the energy to do the things I enjoy.”</li> </ul>
“What else does ‘living well’ mean to you?”	<ul style="list-style-type: none"> <li>• “Being independent. Having a clear mind.”</li> <li>• <i>[Ad lib response.]</i></li> </ul>

***Follow Debrief Guidelines on page 1.***

***After debriefing, switch roles and move on to the next role-play rotation to continue the conversation.***

## ■ ROLE-PLAY ROTATION 2

### Role of Facilitator

Continue the conversation. Carry forward key themes and what was learned from the individual and agent up to this point.

1. Use the **Learning Tool: Exploration Phase of ACP Conversations**.
2. Pick up where the previous Facilitator left off. Facilitate sections **5, 6, and 7** in the Learning Tool.
  - **5. Explore and listen for past experiences that help the individual express goals and values that may impact future decision making**
  - **6. Explore cultural or spiritual beliefs that may influence care and treatment preferences**
  - **7. Explore understanding of medical condition(s) and potential complications**
3. Listen to the role-player's responses. Use the skills on the Communication Skills card and apply critical thinking to individualize the conversation and promote more discussion.
4. Now, set this role-play packet aside. You will only need the Learning Tool to engage the role players.

### Role of Individual Living with Chronic or Serious Illness

You are the individual living with heart failure and diabetes. Carry forward the story line and key themes of what was learned from the individual and agent up to this point.

**Focus your responses to the Facilitator's questions.** Ad lib your responses. You may use the following suggested responses for specific questions. Provide one response at a time to keep the discussion interactive. Avoid complex answers.

When Facilitator asks:	Suggested responses:
"Tell me briefly about any experiences you have had with family or friends who became seriously ill, and decisions were made about their care and treatment."	<ul style="list-style-type: none"> <li>• "My aunt had emphysema for a long time and then got COVID. She was hospitalized and unable to get off the ventilator. Her family argued about whether to keep her on life support."</li> </ul>
"What did you learn from that experience?"	<ul style="list-style-type: none"> <li>• "I don't want to die in the hospital like that."</li> </ul>
"What else did you learn? Anything else?"	<ul style="list-style-type: none"> <li>• "I don't want my family to disagree about my care."</li> <li>• "I want more control over my life than she had."</li> </ul>
"What cultural beliefs do you have, if any?"	<ul style="list-style-type: none"> <li>• "What do you mean?"</li> <li>• "I don't know if there are any conflicts with my culture beliefs."</li> <li>• <i>[Ad lib response.]</i></li> </ul>

<p>“What spiritual beliefs do you have, if any?”</p>	<ul style="list-style-type: none"> <li>• “My faith is important to me. I attend services when I’m feeling up to it.”</li> <li>• <i>[Ad lib response.]</i></li> </ul>
<p>“How can we support your needs and/or practices?”</p>	<ul style="list-style-type: none"> <li>• <i>[Ad lib response.]</i></li> </ul>
<p>“Tell me what you understand about your medical condition(s)?” <i>and/or</i> “What current symptoms are you having?”</p>	<ul style="list-style-type: none"> <li>• “I have heart failure and diabetes. My heart is weaker. They have me on meds to help with these things.”</li> </ul>
<p>“Have there been any changes with your <i>[medical condition(s)]</i> in the past few months?”</p>	<ul style="list-style-type: none"> <li>• “I have a lot of meds to remember to take each day. I take water pills for my swollen ankles and feet. I need to use oxygen now.”</li> <li>• “It is harder to do things.”</li> </ul>
<p>“What problems do you think you may have in the future from your <i>[medical condition(s)]</i>?”</p>	<ul style="list-style-type: none"> <li>• “Sometimes when my legs swell, it gets hard to breathe and walk. Will it get so bad I cannot walk at all?”</li> </ul>
<p>“How has your <i>[medical condition(s)]</i> changed your life?”</p>	<ul style="list-style-type: none"> <li>• “I get short of breath and have less energy to be as active as I want. I don’t like asking for help”</li> </ul>
<p>“What worries you most about your <i>[medical condition]?</i>” <i>or</i> “What fears do you have?”</p>	<ul style="list-style-type: none"> <li>• “I worry about suffocating to death or having a heart attack. Could this happen to me?”</li> <li>• “I worry I won’t be as good as I am now and have to have more help that I can’t afford.”</li> <li>• “I fear I will lose my control of my own life.”</li> </ul>
<p>“What needs or services, if any, do you want to discuss?”</p>	<ul style="list-style-type: none"> <li>• <i>[Ad lib response.]</i></li> </ul>

***Follow Debrief Guidelines on page 1.***

***After debriefing, switch roles and move on to the next role-play rotation to continue the conversation.***

## ■ ROLE-PLAY ROTATION 3

### Role of Facilitator

Continue the conversation. Carry forward key themes and what was learned from the individual and agent up to this point.

1. Use the **Learning Tool: Exploration Phase of ACP Conversations**.
2. Pick up where the previous Facilitator left off. Facilitate sections **8, 9, and Closing the Exploration Phase of the Conversation** in the Learning Tool.
  - **8. Explore hopes that help the individual express an outlook for their future**
  - **9. Explore hospital experiences that help the individual express goals and values that may impact future decision making**
  - **Closing the Exploration Phase of the Conversation**
3. Listen to the role-player's responses. Use the skills on the Communication Skills card and apply critical thinking to individualize the conversation and promote more discussion.
4. Now, set this role-play packet aside. You will only need the Learning Tool to engage the role players.

### Role of Individual Living with Chronic or Serious Illness

You are the individual living with heart failure and diabetes. Carry forward the story line and key themes of what was learned from the individual and agent up to this point.

**Focus your responses to the Facilitator's questions.** Ad lib your responses. You may use the following suggested responses for specific questions. Provide one response at a time to keep the discussion interactive. Avoid complex answers.

When Facilitator asks:	Suggested responses:
"What do you hope for with your current plan of care?"	<ul style="list-style-type: none"> <li>• "I hope that I get better; or at least, not get any worse."</li> <li>• "I hope my breathing stays under control."</li> </ul>
"Is there anything else you hope for?"	<ul style="list-style-type: none"> <li>• "I hope I can continue to take care of myself as long as possible. I do not want to become dependent on my family."</li> </ul>
"If these hopes do not come true, what else do you hope for?"	<ul style="list-style-type: none"> <li>• "Why wouldn't these hopes come true?"</li> <li>• "I worry about not getting air and feeling panicky."</li> <li>• "I hope this can be managed so I can remain at home."</li> <li>• <i>[Ad lib response.]</i></li> </ul>

<p>“Have you been in the hospital or ER recently because of your <i>[medical condition]</i>? Briefly tell me about it.”</p>	<ul style="list-style-type: none"> <li>• “Yes, my breathing got so bad, I had to go to the hospital last month. They gave me IV medication to reduce the swelling and breathe better.”</li> <li>• “It was scary. My family didn’t think I was going to make it.”</li> </ul>
<p>“What did you learn from that experience?”</p>	<ul style="list-style-type: none"> <li>• “It was scary to be in the Intensive Care Unit. I was able to get better and return home. Could this happen to me again?”</li> </ul>
<p>“What else did you learn? Anything else?”</p>	<ul style="list-style-type: none"> <li>• “The doctors said that my heart and lungs are weaker, and I might need the ventilator next time.”</li> <li>• “I’m not willing to give up yet.”</li> <li>• <i>[Ad lib response.]</i></li> </ul>
<p>“Does this summary capture our conversation accurately?”</p>	<ul style="list-style-type: none"> <li>• <i>[Ad lib response.]</i></li> </ul>

***Follow Debrief Guidelines on page 1. This concludes the role-play exercise.***