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All right, everyone, welcome, and thank you for joining us today. This is the session on Ethical Facilitation from Principle to Practice. So grateful that you're able to join us today, and so excited to get into the content. Typically, I would probably sit here for a couple of minutes at least, and just sort of

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You would not stall, you would expertly put in some great facilitation tips, tricks, and techniques to engage people already

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Have a formal break scheduled. And so if you need to at any point in time, stand, stretch, refill your beverage, grab a snack, whatever the case may be, please feel free to do so. Know that we are recording today

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And if there are others in your office or on your team who might benefit from the content, you're welcome and encouraged to do that as well. We will email you afterwards with the complete recording and the slide deck, so just know that.

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In the meantime, we do encourage you to silence the things that ring, ding, and buzz. We know it is easy in this digital age to multitask, but we know that our brains cannot do that very well or success

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As we get into it, just some quick logistics. We of course have like normal, more content we'll probably get to, but we are really looking for this to be a place that is learning that you need. And so if you have questions, answers, please use Q&A function so that we can find them, moderate them, and hopefully respond to them

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will let you say how you're feeling, what you're thinking, just exactly what you're believing about

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Captions are enabled if you want to use them. We are recording the session. And so I know typically within an ethics session, there is often a place of internal sharing. Please note, since we're recording, use that as you temper the examples that you may want to cite or give

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As an facilitator, where does the ethics intersect there? And then we want to bring in a real world dilemma or two using the framework to identify risks, what values, how a facilitator responds specifically in ethics at the fore

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Planning, preparation, design, and execution, and how you approach facilitation for your own betterment as a facilitator, but certainly for those that you facilitate for

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Ethical framing will move into these core competencies that we've been talking about a little bit already. If you are at all familiar with our self-assessment or our certificate course, you maybe have been exposed to them a little bit already, but exciting news

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Lowell and I have undergone sort of a year-long

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person that have a lot more time. We like to give you a lot of background information on us. Many of you joining here today likely already know who we are, and we will encourage you to seek us out and follow us on LinkedIn. But for the purposes of today, want to just say myself

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Greetings, everyone. My name is Lowell Appleba

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And I'll say, as someone who's just going through the recertification process now, which is always fun, the ethics piece of this is a dedicated piece of work that is part and parcel of earning and keeping that certification. And so the balance of how you incorporate that in your facilitation, how you live that as a facilitator

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Principle then to our own ethics, morals, what guides us. And so as we show up and as we design and as we execute as a facilitator, who we are has a huge role to play in the environment that we create and ultimately the outcomes we produce

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How does

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reflective afterwards

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Right? What are you stating at the outset in your conditions for success? What are you holding as true as you bring about the facilitation

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Yeah, I love this slide so much. And I know we don't have time to sit on it too much longer, but I love the idea of ethics showing up in the design, in the delivery, in the moment to moment decisions we have to make on the spot, and even really post session and how we're documenting and sharing out some of the information materials, right? It's not just about a stated value

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So a little bit of chance for you to give us a quick piece of feedback. We'll put a few of these

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Well, and we're seeing quite a range of ideas in chat

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Ask yourself that question going into each and every one of your facilitations, even if it's the same group day to day or week to week, or month to month, what you are faced with, what the ethical challenge might be, may change. And certainly be thinking about how it's different with different groups or different topics that you're leading or facilitating with, right? Because

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It's only us, right? But other people are also likely dealing with something similar. So we're going to move into this core competencies segment for just a little bit. There is a lot of content on the next two slides that we're about to share, and we're not going to talk through every single one of them

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Ensuring aims are co-created, not maybe necessarily just handed down from on high

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of use of different senses and how we best use either the virtual or the in-person room. But creativity has the application when it comes to ethics inclusion as well, as we think about wanting to demonstrate in a meaningful and echoing way what we mean when we say ethics

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So, so many, right? Like if you think about and span each of the eight domains, so many different ethical touchpoints that could show up for you. And so we have a couple of different chat questions that we want to introduce to you here and want you to engage with us in. Lowell's going to talk about this one

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ethics into those places

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Which domain is your strongest ethical practice? So as you think about when you enter into a facilitation, scoping, design, planning, execution

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someone that organizational OD, organizational development is part of who you are and what you do. And so you're the creativity is a piece for you. If you want to put in the chat, just put the number of the actual domains where you find the most resonance, if you will, of where you incorporate them

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And while we wait, and as people are typing a couple of things to think about. Number one is like maybe you've never thought about it before. And maybe your answer is for now, like, I don't know

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Or as you look at each of these 8 domains, like maybe one or two numbers do sort of jump out or stand out to you, and it is easy for you to think about, oh, yes, like, I feel... I feel that ethics shows up for me in this way, and I'm pretty good at it, right? I have some strength in that area.

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And so even if you haven't considered it before, maybe it's looking at these domains and just giving yourself a little bit of thought and self-reflection, maybe something jumps out at you.

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And I'll share just to fill in a little space here. I think for me, my answer would be number one. I think about like I try to infuse them all, but from the very start, when I'm having an initial conversation with a partner or a client, a staff member that wants facilitation

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Developing relationships builds the groundwork for trust, so that really resonates with, I think, Lowell, what you're saying. Someone else said, try to give a creative example to spark thinking among the group, right? So giving people kind of the framework, the resources that they need in order to be successful

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Along that same lines, one of the things that I've been interested and curious about is when we foster creativity throughout a facilitation for a group, sometimes the creative facilitation methods or formats we're using can themselves be

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but also just body size and being comfortable or not comfortable, or even having the ability to do an exercise like that. And so for me,

tied to creativity is like, yes, creativity, but not just creativity for the sake of it, but because it actually has a meaningful purpose

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And people can choose to or not to participate in that particular activity. And for those who choose not to, to not feel like those people have been excluded in some sort of meaningful or inappropriate way, right? And so

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Yeah. And Lou, I know we have to keep going. Kelly, Nick, and Tyus all gave us great answers in the chat as well. And so I'm biased everyone to check them

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This is just a snap judgment. You can revise your answer later. You can make a different decision later, particularly once you've been through the full self-assessment. But which domain is your biggest growth edge as it relates to ethics? Again

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And Aaron, you and I often talk about how despite the fact that we facilitate full time, that facilitation for us is also a place of learning and of growth

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And so as

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Otherwise, I see people are putting in their numbers. I'm wondering if I could ask you, as you think about from this moment, just this moment in time, where do you find that you're looking to have a biggest growth edge when it comes to incorporating ethics into your facilitation domains?

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Well, you know, I would say, off the top of my head, unprompted, number four is one of the places that I'm, like, really curious about leaning into more. I think that oftentimes the aims are established with the sponsoring organization, and they may not

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You know, always introduce them, always post them, always point back to them, always at the end of the session, sort of coming back to seeing if we have achieved those things, but not always necessarily co-created, right? There's not always a lot of super clear transparency in terms of how those aims were generated

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Jackson just said interesting about the same domain you cited that he

struggles with number four and he feels that it's predetermined often, which

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You know, how much of the role we have to play to shape these things is really a question as you're designing the facilitation.

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All right, friends, we're, believe it or not, almost halfway through the session already. And so let's go from the place of sort of structure and domains into some practical application. We want to bring you a few real world ethical dilemmas, but we want to give you a tool to use in these dilemmas. And this is specifically thinking about the facilitation approach, what the tool could be

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What role you are supposed to have in that, what is the incorporation then and the consideration of the audience and the individuals involved? Are there power dynamics at play? And from a very technical sense, is information confidential, sensitive, and complete? Like, what are the facts that informed this

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The second is to then incorporate with the evaluation the alignment with the domains. And so the domains give you structure, right? And so where are these things that are happening intersecting? What are the domains that are supposed to be guiding excellence and facilitation

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If you don't take those actions. So often the line we have to walk as facilitators is not just choosing to say something or do something, but to be very careful when we choose not to as well.

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When something needs to be given space, when they can resolve it themselves, and actually us resolving it doesn't allow them to go through the process of resolution, but also not wanting to go to a place that all of a sudden safety is shattered, and people are not going to be willing to engage because they're going to feel that they're going to be harmed if they do so

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How do we make these choices? And then an integrity-based response. Ultimately, what is the response that you want to make in an ethical moment? In a moment of facilitation design or execution that will be true to who you are, that are true to the

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which went well when it comes to ethical inclusion and up and raising it up is recognized. But also without the citation of individuals, how

the lessons that were learned can still be something that stays with the group. So hopefully

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I just know that I think

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It is a pattern they can learn from for the future.

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Aaron, anything you want to say on the tool before we go into the first actual example?

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I'm going to read the scenario to you, and I just want you, as you think about what is happening, what is my role? Who is impacted? Who holds power? What information is confidential, sensitive, or incomplete? You don't have to answer them all. Just pick one and as I read the question to you, as you have time to think and process, just drop in chat your answer to one of those questions

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And as I read, if you have any answer to facts and stakeholders, feel free to drop it in chat.

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You are facilitating a board strategy session. One board officer privately tells you they want to use the meeting to headline a major directional shift they've been working on behind the scenes and want your help steering the conversation toward that outcome. They believe the board needs strong guidance, but they have not socialized this proposal through proper governance channels

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We're not answering those questions now. We're just thinking about facts and stakeholders. What is actually happening here? What is my role? Who is impacted? Who holds power? What information is confidential, sensitive, or incomplete? Again, don't answer them all, just pick

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And just start dropping, populating in chat some of the facts and stakeholders that you're already noticing based upon the limited information you have

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I mean, one thing is to really try to understand the dynamic of the stakeholders in the audience and the role of governance power comes into play. In such a way

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that although we want to see a board chair and board officers that are there from a place of service, so often it could be a place of ego, right? And so

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If the dynamics of the organization are such that there is a monarchical or dictatorial power given to the board chair historically

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impacting others in the room is maybe, yes, important and maybe also obvious, but what so many other people are drilling down into is that all members are going to be impacted by this decision. And so having some sort of semblance of order and transparency and clarity

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As we begin to sort of drill down into then the alignment with domains, so many, very infrequently are you ever going to just say one domain, but maybe this aligns with domain one because you're trying to be transparent about your role and trying to be neutral with all of your key stakeholders. Maybe it aligns with

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4 because aims are intended to be co-created and free from hidden agendas. Maybe domain five methods that don't privilege certain voices or outcomes, right? There's a lot at play here, including neutrality, transparency, and trust

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Or maybe there should have been a discussion had with certain folks leading up to the facilitation as well, whether it's that person one-on-one, whether that's with the CEO, the board chair or others within the organization or the group

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There, you will find that

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these ethical webinars as we have these conversations in facilitation as well. There is no one right answer

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I'm curious, any other thoughts, Lowell on this one before we move on?

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Please.

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Well, I want to pick one or two things because there's some brilliance that are being shared in the chat. I mean, I love what Kelly Turner's

sharing. You risk concealing advocacy inside a supposedly neutral facilitation process.

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And I think that that is just a powerful thing she followed up by saying the job isn't to get the board to agree with a particular answer. The job is to make sure the board is a good enough conversation to make good decisions

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Well, not to be scary, but like that follows you with if you're internal to an organization that follows you internally. And if you are external to an organization that follows you externally. I think you get a reputation, you know.

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Perfect. So let's talk about the next one.

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Harmful behavior and group safety. You're facilitating a committee charged with revising an organizational policy. And one committee member regularly makes comments that are subtly dismissive of colleagues from historically marginalized identities.

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These comments undermine psychological safety, but fall into the category of plausible deniability, right? So subtle harm delivered in ways that allow the speaker to deny intent

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Well, you know, I think number one, like we've upped the ante from scenario one to scenario two, right? Like we're talking about

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They could be microaggressions, they could be outward, like, racism or sexism. We've upped the ante, certainly. And so, number one, it's like, my stomach starts to get a little queasy because, like, we're dealing with.

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Like, obviously the people who are feeling sort of the negativity, the racism, the sexism, whatever

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everything else in the facilitation. So for me, you know, when I think about

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Yeah.

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be expecting from one another. And that, of course, then leads into the actions you can take

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And in particular, I'd be interested for your thoughts on what's the risk that happens if you don't, right?

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If nothing happens here

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Is it possible? Is it possible that

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And frankly, even the individual impact of those who were harmed by what was said of having to take that back in some way, navigate that in their own journeys and their own lives

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Yeah, the one thing I want to say here, though, I'm sorry, I'm going to just jump in. I'm seeing just a little bit of discussion again. Is there one right answer to this solution or to this scenario? The answer is likely no. However, the one sort of

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Right

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Truth bomb that I want to leave here in this moment before we move on is that the person who has said a sexist or racist thing, the person who's been, who's contributed to the microaggression, I don't consider their comfort in the solution to this matter, right? And so

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Yeah.

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resolve that however you want. But just food for thought for you to think about is like, how much are we leaning into the comfort of that individual versus the comfort, the psychological safety of everyone else in the room? And based upon some of the reactions I'm seeing, I think that people are seeing some alignment as well, and just like food for thought.

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I love that, I mean, what you have me thinking about right is

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Yeah.

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Gosh, the nuance that you see a facilitation of one, you see a facilitation of one, and I think that there's the dynamics of trust that you have been able to build with the cohort itself

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That when there is a stronger relationship and a stronger dynamic of trust, then you're able to address things, I think, more directly. And where you're new, you haven't built that dynamic yet, the relationship of trust that you have built with the people you

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Absolutely. All right. We could talk about just these scenarios for the rest of our 16 minutes together, but there are a couple of other items that we really want to touch on. So we've talked a little bit about the self-assessment. Some of you have already even taken it

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Lowell, do you want to lead us through this first slide or two?

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You'll see that the assessment is meant to sort of be able to help you get a better finger on the pulse of yourself, but through two separate lenses. So the first lens that I'll talk about briefly is just the lens of knowledge, right? So in a moment, we're going to give you some of the specific places of domain intersect with ethics for you to just do a quick little piece of the self-ass

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that you're just hearing about for the first time or you're early in your journey in terms of intentionally incorporating this is this as a place that's moderate knowledge that you think about the domain aspects where I can go to often as you plan and execute your facilitations

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Or are you truly sort of a knowledge expert? Like there could be letters after your name in this domain because you have been able to so successfully incorporate it from a place of fluency that you can actually teach others about it, if you will.

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And obviously on the screen, this is a lot of text. In a traditional training, I wouldn't say never have this much text on the slide. But it's really from like a demonstration standpoint. We want you to know that if you go into the self-assessment, you will get all four of these definitions, and then you can apply them

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to each of the domains and each of the competencies. And we're going to ask you to do it if you complete the self-assessment from two lenses, both from the knowledge lens, and then immediately to the practice lens. Very little changes here, still the same sort of no practice, limited practice, moderate practice

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It's the one thing to know that microaggressions are happening in the facilitations you lead, it's another to address them, right? And so we're not going to take time to do this now. It's just sort of a demonstration of what the self-assessment looks like. We've given you or excerpted from domain three just the first four competencies

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So for just a place of getting you to hopefully reconnect as we're three quarters of the way through. As you look once again at the eight domains

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And where

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Would be an interesting day if you want to share if you think it's across the eight domains, where do you think your own knowledge and practice are going to be the most different, right? What do you either know more about but haven't actually used

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Or what have you actually like used frequently, but never actually like studied or thought about or dived or

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Dymen, that's my favorite. Where have you, Divinen? Yeah

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I dive, dove, didn't

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David, is that good?

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It's amazing.

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Where have you actually taken a deeper plunge in your intellectual journey, if you will.

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And I'll say for me, probably the place that I could use the most time is probably domain seven actually. It's something that's certain from

a place of application that is practice is something that

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But in terms of my own place of wanting to, like, study deeper, to, like, be more knowledgeable in the representation of documentation and follow-through, there's probably a lot of theory there I haven't had the opportunity to explore as much as I would want to, so

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That for me would probably be my place. How about you, sir?

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Yeah

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Yeah.

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winds down for today. But just kind of thinking for yourself here, what tends to get in the way now of putting ethical knowledge into practice? Okay, rubber meets the road, right? Like, what tends to get in the way of putting ethical knowledge into practice? And I think it's easy, and if you think of anything, please share in chat. I love to

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Yeah.

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Gosh, Cynthia, like, that was amazing. I wasn't sure anyone was going to type something so fast with that courage is brilliant. Thank you. I love that. I was going to say, like, I think it's easy to lean on things like time, right? Like, we don't have the time, but

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While you may not have subject matter expertise within an industry and organization, a discussion, whatever you're leading or facilitating, what an impact you have in the groups that you work with

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And that organization, the industry, the long-term nature of the industry, if you're not using ethical practice within your work

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Okay, so many amazing things in chat. Please continue to type them. I love them so much. They are very inspiring and moving, and I think very self-aware of you all for leaning into.

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Yeah. So as we're starting to come to the close, so far we've taken on

the approach of thinking about the approach to ethics and facilitation through the eight domains, which are competencies of knowledge and skill. But what's critical as a facilitator is to be able to integrate them into actual approach and process.

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sort of the through line there, right? The horizontals through those vertical domains is the before, during, and after facilitation. And so as you think about actually the construct of facilitation itself, how do you think about the pre, the during, and the post

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occurrences that have happened. What happened anything happened in a previous facilitation that you should know about? Is there any changing shifting dynamics of power in the organization you should know about

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pieces that could come into play.

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During the facilitation itself, of course, you need to know your design well

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professional. And then specifically wouldn't let them sit anywhere near the front. They were in the back corner for every single thing. Is that okay right like what what are the dynamics in the room itself? And what role do you have to play in those dynamics to ensure that ethics are part and parcel of how you do this

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And of course, the after what was impacted, how do you document it? How do you follow up with concerns? How do you follow up also with celebrations and recognizing your ethics and moral champions so that they could be elevated and you see more of that behavior in the future

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I love that. As we prepare to land the plane today, just a few minutes left. Want to leave you with a couple of things. Number one is just this facilitation roadmap, like begin to, like if you're looking for a place to start, these are five really good places. Gain some awareness of the eight domains and their ethical touchpoints. Where can ethics show up within our facilitations

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Use that F-A-C-A, that FASC framework when ethical gray areas arise for you or in the sessions that you're leading or facilitating

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Or maybe others will see that same thing show up for themselves, and maybe they'll connect with you afterwards and ask you how you intend to do the thing. The thing that I know about ethics and facilitation is, like, this isn't a solo person sport, right? You might find yourself in the front of the room

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on a Zoom call, in a Teams call, regularly doing the thing on your own, but you don't have to process these ethical scenarios by yourself. And so finding others to lean in on, I think, can be so important for you.

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We really appreciate all the participation. Again, your wisdom is upping the ante on this session. There's such great things in the chat. Transparency and trust coming out a lot, Aaron. A lot

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Awesome.

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I'm likely going to send the email out tomorrow morning, so don't fret. You will get the email. It will likely be tomorrow morning once the recording processes. But just a couple of things. If you have taken our self-assessment in the past, amazing. Thank you. Hundreds, hundreds of people have taken it in the past

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You'll get a copy of your results sent directly to you, right? So step one, this was one of the sort of recommended next steps that we promoted in the facilitation roadmap, and it's here for you and know that it's all new, it's all revised, it's beautiful. We're very

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Number two, if you have taken our facilitator certificate course for association facilitators, amazing. Thank you. If you're like, what are you talking about? Lowell and I offer a deep dive, 3-month-long course for association facilitators

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over 100 folks have found it very beneficial to their practice.

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A couple last ones here, Lowell, do you want to take us through?

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Sure. We also have this is a community we've had already today, but it doesn't have to stop here. Invite you to join the LinkedIn community of practice for facilitate me. For facilitators, by facilitators with facilitators. Come with your problems, your queries

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your great ideas we love to share articles and approaches

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And just for fun, Aaron and I also do, it's not facilitation focused, but an association book club. We every two months, it's free. We have about 200

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and to learn together.

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I think that takes us to the very last moment we're so incredibly grateful for you having spent the time with us. We hope that this is a session where you were able to discover something new or reinforce a piece that you already had. And that ultimately that ethics is something that is not just what you do, but also who you are and what you're able to incorporate.

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Aaron, what would you like to close this out with?

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Last thing is that thank you for joining us. And again, if you attended live today, you earn one CAE ethics credit is already pre-approved with ASAE. You don't need anything from us. You can just put your name on your renewal application with one CAE credit and they will know that you got it from us. So pre-approval is already in place