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Ethical Facilitation

Upholding Integrity Through Core Competencies

Tuesday, December 2, 2025 | 1 – 2 p.m. ET / 12 – 1 p.m. CT

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Logistics

- We're scheduled to be together for the next 60 minutes
- We do not have a formal break scheduled during this presentation
- Take care of your needs during our time together (i.e., refill your beverage, grab a snack, stand and stretch, use the restroom)
- We encourage you to silence the things that ding, ring and buzz
- Use technology to help keep you in the "room" today
- We will make all slides available to you following the presentation
- 1 CAE ethics credit is available for participating today in the live program only

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Participation Methods

- **Q+A:** Enter questions and engage with the facilitators via the Q+A function.
- **Chat:** You're welcome to communicate with other attendees via chat.
- **Reactions:** Utilize "Reactions" as a non-verbal communication strategy.
- **Captions:** Captions are enabled should you wish to use them.
- **Session Recording Notice:** This session is being recorded. Please refrain from sharing confidential information.
- **AI Notetaker:** If you are using an AI notetaker, please make sure it's set to not share afterwards.

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Session Aims

Rational Aims

- **Connect ethics to facilitation competencies** by examining how core values appear across the eight domains.
- **Evaluate real-world dilemmas** using a framework to identify risks, values, and aligned facilitator responses.

Experiential Aims

- **Engage in ethical reflection** through self-assessment, scenario dialogue, and personal commitments.
- **Build shared understanding** by exploring ethical gray areas in a community of practice.

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Agenda

1	WELCOME, CONTEXT + ETHICAL FRAMING		**4**	SELF-ASSESSMENT FOR ETHICAL REFLECTION
2	CORE COMPETENCIES THROUGH AN ETHICS LENS		**5**	ETHICS ACROSS THE FACILITATION LIFECYCLE
3	REAL-WORLD ETHICAL DILEMMAS + DISCUSSION		**6**	ACTION COMMITMENTS, RESOURCES + CLOSE

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Presenters

Aaron Wolowiec
Founder & President
Event Garde
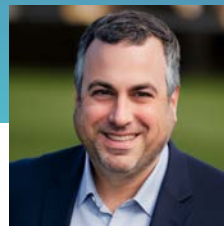
Lowell Aplebaum
CEO
Vista Cova

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Ethical Facilitation: Principle → Practice

Ethics
How we design, deliver, and close facilitation.

Integrity
Shows up in our decisions, behaviors, and processes.

Practice
Lived moment-to-moment, not just stated intentions.

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Chat Question:

Which ethical challenge feels most relevant in your facilitation work today?
- ✓ Neutrality
- ✓ Confidentiality
- ✓ Inclusion
- ✓ Power dynamics
- ✓ Documentation

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Core Competencies
Through an Ethics Lens

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Association Facilitator Core Competencies

Domain	Ethical Touchpoint Examples
Domain 1. Develop Collaborative Stakeholder Relationships	• Establishing trust by being transparent about your role, neutrality, and boundaries with every stakeholder. • Ensuring all stakeholders — not just the most influential — have equitable access to shaping the purpose, scope, and expectations of the engagement.
Domain 2. Create a Participatory Environment	• Designing engagement structures that prevent domination and ensure all participants can meaningfully contribute. • Upholding psychological safety by addressing harmful behaviors and maintaining a respectful, balanced speaking environment.
Domain 3. Create an Inclusive Environment that Honors Diversity	• Intentionally centering marginalized voices and applying equity-informed choices in every stage of facilitation. • Anticipating and mitigating barriers to participation (access, language, culture, ability, identity) to ensure full inclusion.
Domain 4. Establish Context & Clear Aims	• Ensuring aims are co-created, transparent, and free from hidden agendas or undisclosed stakeholder pressure. • Honoring participants' time and engagement by clearly defining what will happen with their input — and what will not.

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Association Facilitator Core Competencies

Domain	Ethical Touchpoint Examples
Domain 5. Develop a Customized Design & Facilitation Plan	• Selecting methods and structures that minimize bias and avoid privileging certain voices or outcomes. • Designing with transparency about how decisions will be made and how participant input will meaningfully inform the process.
Domain 6. Create an Environment that Evokes Creativity	• Ensuring creative activities are culturally aware, accessible, and do not unintentionally alienate or tokenize participants. • Protecting participants' psychological safety by fostering experimentation without judgment, competition, or undue pressure.
Domain 7. Support Implementation Through Quality Documentation	• Accurately recording participant contributions without re-framing, filtering, or prioritizing content based on facilitator bias. • Safeguarding sensitive information through confidentiality, appropriate attribution, and secure handling of materials.
Domain 8. Build & Maintain Professional Knowledge & Attitude	• Committing to ongoing learning in ethics, DEIB, and facilitation to avoid outdated, harmful, or exclusionary practices. • Modeling integrity through neutrality, accountability, and reflective self-awareness in every facilitation context.

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Chat Questions:

1. Where do you see your strongest alignment between ethics and competency?

2. Where do you see gaps?

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Real-World Ethical Dilemmas + Discussion

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Ethical Dilemma Evaluation Tool

Step	Key Questions
F — Facts & Stakeholders	• What is actually happening? • Who is impacted? Who holds power? • What information is confidential, sensitive, or incomplete?
A — Alignment with Competencies	• Which competencies are touched (participation, inclusion, neutrality, documentation, etc.)? • Which ethical values are at play (transparency, equity, trust, accountability)?
C — Choices & Consequences	• What are the possible actions a facilitator could take? • What is the potential harm or benefit to individuals, relationships, and the group? • What risks exist if you act—or don't act?
I — Integrity-Based Response	• What response upholds trust, fairness, and psychological safety? • How can the facilitator act while honoring their role and boundaries? • What support, documentation, or follow-up is needed?

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Confidential Input vs. Transparency

You are facilitating a staff retreat for an association. During a pre-session confidential interview, a staff member shares that they feel intimidated by a senior leader who frequently dismisses their ideas. They ask you not to attribute the comment, and they are unsure whether they even want it raised anonymously.

During the retreat, the same senior leader dominates conversation and dismisses several staff contributions in real time. Other staff become visibly disengaged.

Ethical tension:
- Do you protect the confidentiality of the staff member's disclosure, even if it prevents you from addressing a harmful dynamic?
- Do you intervene in the moment, knowing it may surface the issue indirectly and create discomfort or risk for the staff member?

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Hidden Agenda & Misuse of Process

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.

During the session, they repeatedly try to influence the process, push their viewpoint into activities meant to be generative, and question your neutrality when you redirect.

Ethical tension:
- Do you challenge the board officer's request and uphold the integrity of the process?
- How do you maintain neutrality when a power holder attempts to manipulate the facilitation to achieve an undisclosed agenda?

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Harmful Behavior & Group Safety

You are facilitating a committee charged with revising an organizational policy. One committee member regularly makes comments that are subtly dismissive of colleagues from historically marginalized identities. These comments undermine psychological safety but fall into the category of "plausible deniability" (i.e., subtle harm delivered in ways that allow the speaker to deny intent).

Some members look to you expectantly when the comments occur, but no one addresses them directly.

Ethical tension:
- Do you intervene immediately, risking tension or defensiveness?
- Do you address it privately, even though the harm is happening publicly?
- How do you balance neutrality with your ethical obligation to protect inclusion and equity?

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Self-Assessment for Ethical Reflection

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Self-Assessment: Knowledge

Under **KNOWLEDGE**, determine your level of knowledge relative to each competency: To what extent are you aware of methods to support the facilitation of the identified task?

✓ **No Knowledge (NK)** — You have little to no previous knowledge about this competency and how it might affect your facilitation work; you have therefore never tried to learn more about it.

✓ **Limited Knowledge (LK)** — You're aware of this competency, curious about its possibilities, and early in your journey of knowledge acquisition; you've maybe done some preliminary reading about this competency and/or have been introduced to it in an education session.

✓ **Moderate Knowledge (MK)** — You are aware when another facilitator has/has not demonstrated this competency successfully and its impact on the facilitation; this is an area you seek to learn more about and have explored learning/coaching opportunities (whether formal or informal).

✓ **Extensive Knowledge (EK)** — You continually pursue a diverse range of knowledge, skills, and abilities related to this competency, up to and include credentialing; you seek opportunities to learn and grow around this competency from other facilitators; you have many years of refined study in this area.

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Self-Assessment: Practice

Under **PRACTICE**, determine your degree of practice relative to each competency: To what extent have you successfully and repeatedly practiced the identified task?

✓ **No Practice (NP)** — You've never really identified this competency in your own facilitation practice (and if you have demonstrated it, you weren't aware); you've never before set an intention to practice/evaluate this competency in your facilitation work.

✓ **Limited Practice (LP)** — You have practiced this competency a handful of times with a level of awareness/intent; you may not always be sure when/how to successfully integrate this competency into your facilitation work; you have yet to seek feedback from others to improve your implementation of this competency.

✓ **Moderate Practice (MP)** — You regularly incorporate this competency into how you approach facilitation; you are beginning to seek regular feedback/mentoring from others in this competency; you intentionally incorporate this feedback into future practice.

✓ **Extensive Practice (EP)** — You incorporate this competency with fluency into your facilitation work; feedback related to this competency has become a standard of practice; you understand the why behind the technique and feel confident in training others in this practice.

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Domain 3: Create an Inclusive Environment

Core Competencies	Knowledge	Practice
Establish a common understanding of diversity, equity, inclusion, and belonging (DEIB) language supported by industry best practice/research		
Incorporate any organization specific DEIB values/statements in the planning/facilitation process		
Bake into the design plan techniques that create safer spaces and center marginalized voices		
Help participants during the facilitation to honor diverse ideas and lived experiences		
Raise consciousness about the effects of power and privilege on participation		
Manage oppressive participant behavior		
Create an environment accessible to all participants, recognizing and designing for individual needs		

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Chat Questions:

1. What surprised you about your ratings?

2. What does that suggest about your ethical practice as it relates to facilitation?

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Ethics Across the
Facilitation Lifecycle

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Before, During & After the Facilitation

Before the Facilitation

- Align on purpose, values, and expectations.
- Share your ethical standards upfront.
- Surface risks around power, confidentiality, and inclusion.

During the Facilitation

- Protect psychological safety and equitable participation.
- Stay neutral while naming ethical tensions transparently.
- Ensure methods and time support fairness and balanced voice.

After the Facilitation

- Reflect on who benefited, who was impacted, and what was missed.
- Document input with accuracy, care, and respect for confidentiality.
- Follow up on concerns and communicate next steps with integrity.

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Action Commitments, Resources + Close

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Chat Question:

What's one ethical commitment you will make to strengthen your facilitation practice?

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Take the Full Self-Assessment for Free

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Association Facilitator Core Competencies Self-Assessment

Welcome & Time Commitment

Welcome! We're so glad you're here. Whether this is your first step in your facilitation journey, or one of many, kudos to you for this commitment to self-reflection. As you build your awareness of these eight facilitation domains and 50 associated competencies, you can begin to more intentionally grow and demonstrate your facilitation knowledge and practice.

It's important to note that this is a robust self-assessment tool. It may take anywhere from 15 to 20 minutes for you to complete depending on your level of self-reflection throughout the survey. You are welcome to keep it open in your web browser and return to it as your schedule allows. If you close your web browser, however, your answers will be lost and you will be prompted to start over.

Without further ado, let's get started!

Aaron & Lowell

https://www.surveymonkey.com/r/FACILIT8me

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Association Facilitator Certificate Course

Spring 2026 Course

- **Course begins:** March 9, 2026
- **Register by:** Feb. 7, 2026
- Brings $1,600 registration fee down to just $1,300
- **Course concludes:** May 26, 2026
- **Learn more and register at:** bit.ly/FACILIT8meSpring2026

Fall 2026 Course

- **Course begins:** Aug. 31, 2026
- **Register by:** Aug. 3, 2026
- Brings $1,600 registration fee down to just $1,300
- **Course concludes:** Nov. 20, 2026
- **Learn more and register at:** bit.ly/FACILIT8meFall2026

Questions about the course? Email us at info@FACILIT8me.com.

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Community of Practice on Facebook

https://www.facebook.com/groups/FACILIT8me

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