

**Guidance for successful digital meetings:
Face-to-face communication when we can't
meet face-to-face.**



Human beings are social creatures and face-to-face interactions are an important part of our daily lives. In a trade union context, meetings are also important forums for discussion and collective decision making.

But how can we have effective and meaningful face-to-face communication when we are social distancing? Video conferencing provides a close second best to a real-life meeting if it is used effectively.

This guide will give you an overview of how to hold an effective digital meeting for consideration before you get started.

N.B. Make sure you also read the Appendix with important GDPR guidance on privacy and security.

1. Hold meetings with a purpose

Set an interesting agenda:

Like any meeting, for people to want to attend in the first place there should be an interesting and meaningful agenda to go with it. Canvass ideas for topics of discussion from people beforehand using WhatsApp, emails, surveys or one-to-ones to ensure that the agenda reflects the interests of those attending. Make sure not to overload your agenda in the time you have scheduled for the meeting, so there is plenty of time for discussion and decision making.

At a time when people might be feeling isolated and anxious due to social distancing, having the opportunity to meet face-to-face can be a welcome relief. Set aside some time at the start of the meeting for people to say hello to each other and say how they are feeling. Encourage people to turn their cameras on as this is the main benefit of video conferencing.

Pick a time that people can show up:

One of the benefits of digital meetings over meetings in person is that it can be easier to find a time for everyone to attend. People can participate from anywhere with a device and an internet connection and might be willing to be flexible with the times they can meet. However, it is still important to determine this before scheduling a meeting. Other communication platforms such as WhatsApp can be helpful for this.

Encourage participation in the chat:

The chat function is a fantastic way to add a new dimension to your meetings, providing a space for more discussion, summarising of points, collecting questions, reaching consensus and getting quick responses from people. Depending on your meeting size, going around and asking everyone to respond to a question can be time consuming. Especially for larger meetings, try to focus as much participation and engagement on the chat as you can.

Hack for sending a reminder for the call:

A couple hours before your call, edit your meeting and change the title of the call to something like "MEETING STARTING AT 4PM". Zoom will then ask if you want to notify your participants of the

changes to your call (click yes), and then send an update to everyone's email inbox. You should do this at least once to remind people about your call. This will mean more people show up!

2. Establish rules and maintain them

Before you get started with the main content of your meeting, let everyone know what your rules of engagement are to help everyone participate to the fullest they can.

It is important that people understand that they should only speak when the chair invites them to and that they understand the method you will be using to coordinate this (see below for different options). People should mute their microphone when they are not speaking as background noise can disrupt meetings.

It is also important to advise people how to conduct themselves in the meeting for their own protection and to ensure that the meeting is considered a safe space. Here are some suggestions of rules that can be shared before meetings:

- Remain professional
- Be considerate and respectful of each other
- Mute your microphone when you are not speaking
- Indicate that you would like to speak and wait for the chair to bring you in
- Do not share individual's comments outside of this group
- Do not make your own recording of the meeting

Whilst people are getting used to digital meetings it would also be worthwhile reminding people of the rules at the start of each meeting.

Addressing disruptive behaviour:

In real life, part of your job as a facilitator is to make sure everyone feels safe and able to contribute to the meeting fully. If someone is being disruptive, making others uncomfortable or just generally being a nuisance, it's up to you to intervene and decide what the best response is. Digital meetings are the same.

If you find yourself in a difficult situation, it's important to first reach out to the participant privately on the chat to let them know their behaviour is not acceptable for this space. This can be a valuable learning opportunity for the participant, who might not understand why their behaviour is unacceptable. It's also useful to check in before taking further action since disruptive behaviour might be the result of feelings of frustration or exclusion from your meeting.

However, if they continue you can and should eject them from your meeting if you think they are making it harder for others to participate. You can do this by clicking on their name in the manage participants view and choosing "remove from the meeting". Once removed, they will not be able to re-join, and you can speak to them about it outside of the meeting.

3. Facilitating the meeting

It is important that the "host" of the meeting also acts as the chair and that participants understand how this will work before the meeting starts. Without effective chairing of a digital meeting it can quickly become chaotic. Hosts and co-hosts are therefore essential in maintaining the established rules.

Hosts and co-hosts:

Hosts are the main managers of your meeting, they have full powers over the call, and are responsible for starting and ending the meeting. They manage participants (muting them, unmuting them and ejecting them) and can record the meeting. Co-hosts can do everything a host does, apart from starting and ending a meeting. In large meetings, co-hosts are essential to enable the meeting to run smoothly.

Taking Questions:

One of the best things about using zoom is the chat box that is available during your calls. If you have a Q&A section of your meeting, ask the participants to post their questions in the chat, and have one of your co-hosts collect them all. That way people can ask questions throughout the meeting, and you can come back to them at the end.

Raising your hand to speak:

If your participants want to speak, ask them to use the raise your hand button, which will let the facilitator know they want to speak. Then just write down the order of who will contribute and facilitate your participants just like you would in a real-life meeting. In smaller meetings it is also possible to simply raise your hand to the camera to indicate that you would like to be brought in by the chair.

How to pass out handouts:

If you have materials you want people to take home with them, or an illustrative example of an idea you are trying to explain, you can either:

- a) Share a file on the chat with your participants. Ideally use a pdf file so it's easy for them to download.
- b) Share your screen with your participants. This way they can see everything you have open on your desktop, and you can go through any materials together.

APPENDIX

GDPR Considerations for online training

During the Covid-19 lockdown the Union is looking to carry out member learning on-line as well as meetings for member engagement. This practice, if successful, may continue in the future.

This document provides guidance about how to maintain security while using platforms with less security, such as Zoom, which can be used for training or conferencing with members.

For meetings involving staff members only, the Union uses only MS Teams and Lifesize as these provide enhanced security.

The reason for this guidance is that we believe that there is a danger that in some online discussion or courses, participants could share sensitive personal data about other members in their workplace, for example when referring to situations that have happened in their workplace. It is important that we take steps to ensure that this does not happen and that data from which individual members might be identified is not shared, or if shared is kept securely. It is particularly important where the online event is being recorded and kept for future use.

Registration & Privacy Statements

Registration should be put in place for such events.

As part of registration for a non-recorded event, please use the following privacy statement:

Your personal data, Name, contact details (Registration data) is collected by the NEU and via the on-line application in use (e.g. Zoom, MS Teams, Lifesize) for the purpose of delivering your training.

***We are not recording this event, however, please respect each other's privacy and do not make your own recordings or take pictures of the screen.*

We will retain a record of your registration record [for members] the lifetime of your membership/ [for non-members] (specify time, e.g. one month).

If the event is being recorded, please use this privacy statement:

This meeting will/may be recorded during the training session. To protect your rights, feel free to turn off your camera if you do not wish your image to be recorded. We will keep a recording

of this meeting for at least a year making it available for other members as part of their learning and development. Please inform the event organiser if you do not want to be identified visually or by audio.

This recording will be retained until the content is no longer relevant or at least for one year.

The recording will become part of the NEU's on-line learning programme and will be viewed by other NEU members and education professionals.

Please do not share personal stories about yourself or anyone else that you may not want viewed/heard by others as part of this recording.

All registrations or return e-mails to participants should include the privacy statement as standard so participants are both assured and clear about how their data will be captured and used with a clear purpose.

All registration, attendance, participation data (chat) must be stored in the NEU systems; NEU servers, Membership system once the Events module is operational.

Data should be downloaded and then deleted from external tools like Zoom.

During the online event

As the course organiser/trainer you will also need to ensure the following:

1. Remind participants at the start of the event that there should be no inappropriate discussion of material which could identify another's sensitive personal data. If the event is being recorded, this is particularly important.
2. Listen out for participants sharing sensitive personal data about themselves or others and remind them not to do that.
3. Review the course before publishing as part of the NEU's On-line learning programme.
4. Seek Data Protection Officer (DPO) help if you believe personal data may have slipped in and make efforts to edit and extract.

Please note that members/participants may share their own or others very personal stories. You may not be able to assess the impact of this shared information to the participant or others and must be prepared to delete the recording or parts of, if the participant request this.

Be very wary and also specific as to why you will record a conference and review it carefully before sharing it as a recording with others.

Other Security advice

Chat is available in some online meeting applications; you should be aware that participants may be able to download the chat and, in some applications, (including Zoom) this may include private chats if the platform allows it. We recommend you **turn off the option to**

download chat wherever possible. You should also ask people to familiarise themselves with the [NEU Behaviour Statement](#) and this can be shared in the chat too.

NEU credentials: Some meeting platforms may offer to integrate with NEU systems such as calendars, email, etc. If the application requests your NEU username and password, it should not be used, and you should not provide your NEU credentials

Prevent “Zoom Bombing”:

Zoom bombing is when somebody joins a virtual meeting using a generic link who should not be in that meeting. The way to prevent this is by using the “register” function when setting up your meeting. This way each person who registers will be sent an individual link and you will be able to access a list of registered participants.

However, this does not prevent people from registering with false information and not turning their camera on during the meeting. In smaller meetings, make sure to engage with each participant at the start of the meeting, so you are sure who they are. This is not practical for larger meetings but it is something you should be conscious of as a possibility and this is also why participants must adhere to the [NEU Behaviour Statement](#).

For additional security on Zoom:

- Avoid using your personal meeting ID numbers to set up meetings
- Secure the meetings with a password
- Once everyone has joined, lock the meeting

(In the meeting, click Participants at the bottom of your Zoom window. In the Participants pop-up, click the button that says Lock Meeting)

- Turn off file transfer - In-meeting file transfer allows people to share files through the in-meeting chat. Toggle this off to keep the chat from getting bombarded with unsolicited pics, GIFs, memes, and other content.
- If appropriate in the circumstances, only allow the host to share their screen

Recording learning or member engagement event

Recording an online event increases the risk to personal and confidential data being available. Unlike photographs of a physical event that may be used, with permission, for marketing, a recording may be kept for some time and will be seen by other who were not the original participants of the training event.

The normal data protection rights for a member/non-member will still apply, personal data will consist of visual and audio data and the content may include confidential information participants may share about themselves or others.

Where the event will be recorded, additional steps should be taken:

1. Take steps to ensure participants are aware of the session is being recorded prior to the start and at intervals during the training

2. Be ready to interrupt participants sharing personal information/stories about themselves or other members e.g. reps relaying issues about the members in their current/previous school.
3. ensure recordings are kept securely in the NEU environment only
4. If a Subject Access Request (SAR) is received from a participant, they may expect to also access your recording as their personal data. If this data isn't easily extracted, they may request their data is deleted; it may be that the whole recording will need to be deleted to fulfil the participants right to 'Access' or 'deletion'.
5. Ensure you have a schedule for keeping or deleting recordings
6. Keep a retention schedule as per below for each recording with a list of participants. You should save recordings to the **shared one drive** and not retain the data on zoom cloud. The retention schedule (table below) should capture all organising online events **recorded** and it and participant data kept or as long as the recording is kept.
7. Keep a record that you have deleted a recordings to avoid the DPO searching for non-existent data when fulfilling a SAR

Example of retention schedule

| Summary of recorded meeting/training | Where is it stored (shared one drive) | Length of retention | Reason for recording and its retention | Date deleted |
|--|---|--|---|-------------------|
| Example: local officers' or reps' VC – link to participant list | Shared one drive in folder: On-Line CPD | One year; When content is no longer relevant | To share with those unable to attend To be shared with future participants | Deleted on X date |
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Retention schedule must be made available to the DPO for requests from participants and as evidence to the ICO if there is an issue.

Delete date is critical as evidence the data no longer exists.

Further guidance:

- GDPR Support Officer, Deepa Shah