



Hybrid Meetings Protocols and Guidance

Context

As we move towards more in person events there will be a number of reasons members may not be able to attend Branch or District meetings. Moreover, during the last year of lockdown activists have moved quickly to ensure members can stay informed and involved. It is important as we return to in person meetings the lessons we have learned are built on, and we work to retain these levels of high engagement. Although officers will be considering a variety of formats for their Branch and Districts, these protocols are designed to support hybrid meeting to ensure decisions and debate are carried out to rule in an equitable way.

PROTOCOLS

The below protocol are designed to ensure decision-making remains consistent with union rules, while prioritising member engagement. It is important that officers facilitating meetings ensure those attending virtually are given the same opportunities to contribute as those present in-person.

Chairing the meeting

In order to facilitate a hybrid meeting it is important that the meeting is chaired by more than one member, each taking responsibility for different elements of the meeting.

1. **Chair:** this would normally be the District President, Branch Secretary or Lead Rep. See District and Branch model rules under Appendix C and G of the NEU Rule Book for more details.
 - a. The role of the meeting chair is to facilitate discussion, and ensure the meeting is carried out to rule. In a hybrid meeting, where the meeting is being facilitated by more than one member, they will also coordinate across the meeting facilitators.
 - b. Ideally the chair should be someone present in the room.
2. **Vice Chair:** a vice chair should be elected from those present at the start of the meeting, or selected prior to the meeting from district or branch officers, for example vice/past president.
 - a. The role of the Vice Chair is to manage the digital element of the meeting. This will include ensuring the chair is aware of the votes and contributions of any attending via video conferencing.
 - b. The Vice Chair should be set up as the host for the virtual meeting.
 - c. Ideally, the Vice Chair should be an in-person attendee.
3. **Facilitators:** in larger meetings (where digital attendance is 10+) officers may wish to elect further facilitators to help manage the digital elements of the meeting. These can be selected prior to the meeting or elected at the start of the meeting.



- a. Facilitators could have a role in supporting the managing of the video conferencing element of the meeting. Facilitators' role could include managing chat functions and sharing information with digital attendees as required.
- b. Facilitators need not attend in person, particularly if the vice chair attends in-person.

Quorum

For formal decisions (e.g. motions to annual conference, national officer nominations) - likely to be the exception not the rule - quorum requirements remain in place. Those attending virtually should be counted equally to those attending in-person. When calculating the quorum, the Chair should ensure that all attendees are members in good standing of the appropriate organisational unit (i.e. Branch/District). If a meeting is inquorate no decisions can be made. For more details on quorum see Appendix C (6.8) for Districts and Appendix G (6.3) for Branches.

In order to facilitate timely and accurate calculation of quorum registration should be taken in advance, collecting membership numbers. Members should therefore pre-register for the meeting and be sent an individual link. Click [here](#) to see how you set-up pre-registration for a digital meeting on Zoom; make sure you add a custom question on the registration form to capture members' NEU membership number. You will also need to produce a register of attendees with membership numbers – click [here](#) for how you can do this on Zoom. If your district uses a different platform your regional/Wales office will be able to advise on alternative mechanisms to conduct registration and produce an attendance register.

When calculating quorum, the chair or vice chair should ensure virtual attendees have their cameras on to confirm attendance.

Facilitating debate between members

In order to effectively facilitate discussion and debate between members the chair should ensure;

- All virtual attendees are displaying accurate name as they appear on their membership record.
- Virtual attendees switch their camera on when contributing and encourage all virtual attendees to keep their cameras as much as they can to facilitate effective engagement.
- The meeting invite asks members if they have any accessibility issues in the invitation. Your regional/Wales office will be able to advise about how to meet any accessibility needs on your digital meeting, including subtitling and BSL.

Ideally, a screen and camera will be set up in the venue such that in-person and digital attendees can see and hear each other (see further guidance below).

Motions and Amendments

Motions must be received in advance, 10 days before, in the case of district meetings, so they can be distributed prior to the meeting.

Where possible amendments should be provided in writing to ensure those attending virtually are clear on any wording before a vote is carried out. If required the chair may call a short break to allow



for the submission of a written amendment during a meeting that can be shared with digital attendees via the chat function. This should be kept to a minimum.

Votes by a 'show of hands'

Under Branch and District rules votes should be carried out by a show of hands and decided by a majority vote. This remains a requirement for hybrid meetings and should be carried out using a show of hands for in-person attendees and digital "hands up" from those attending virtually. The Chair and Vice Chair should then calculate the outcome of this vote. In case of a disagreement the decision of the Chair is final. Any challenge to this should be considered at a later meeting (see Appendix C, 7.4 and Appendix G, 7.2).

Secret Ballots

If 25% of those present (across those attending virtually and physically) request a secret ballot the Chair should facilitate this. For in-person attendees this can be managed using the normal processes followed by the Branch or District. For those attending virtually the Vice Chair/facilitator will call a poll of members present and report the result to the chair, who will tot-up and announce the total outcome, without disaggregating subtotals.

Dealing with disruptive behaviour

All NEU events, including meetings should abide by the union's Behaviour Statement. The meeting chair should act as the "event coordinator." This statement is replicated below in the guidance supplementing these protocols.

All contributions by those attending in person and virtually should be made through the chair. If a member, whether attending virtually or in-person, is being disruptive, for instance by failing to abide by the Code of Behaviour or by refusing to follow reasonable instructions from the Chair/Vice Chair, then steps can be taken to refuse them permission to speak and *in extremis* eject them from the meeting. For such virtual attendees, they should be muted in the first instance, and informed why; if their disruptive behaviour continues the Chair can ask the Vice Chair to remove an attendee for an allotted time or the remainder of the meeting.

The decision of the chair is final. Any challenge to this should be made at a later meeting.

Dealing with connection issues

Facilitators and contributions from members attending virtually may be interrupted by technical issues.

1. If a facilitator (i.e. chair/vice chair) loses connection another facilitator should take over until a connection can be re-established.
2. If a motion/amendment mover loses connection the seconder should take their place until a connection can be re-established.
3. If a member making a contribution to the meeting loses connection the chair should move to the next speaker until the member is reconnected, and then bring them back in at a later point in that item of business.



4. Should a motion/amendment mover, or a member making contribution lose connection, and the item of business is resolved before they return the chair can decide to postpone the discussion till later in the meeting or resolve it in their absences.

The decision of the chair is final. Any challenge to this should be made at a later meeting.

If due to connection issues, numbers of attendees falls below quorate the chair may decide to postpone decision making items to a later point in the agenda or table them for subsequent meetings.

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FURTHER GUIDANCE

Managing the facilitation team

- Set up a separate facilitation team chat. This can be used to share questions from members quickly, and to support the chair with vote counting and managing contributions. The best format for this is a separate chat group using WhatsApp or Microsoft Teams. Keeping this discussion separate allows for the chair to manage the meeting effectively without disrupting the natural flow of contributions from members present.
- In the case of larger meetings of 25 or more members, officers should consider selecting the facilitation team in advance. Where meetings are expected to be 100 or more members officers should consider contacting regional office for staff support.
- In larger meetings additional facilitators are essential for managing any chat functions, and ensuring all contributions from those attending virtually are included in the meeting with equal weight of those there in person.

Voting

- Depending on the video conferencing system used for meetings Chair/Vice-Chairs should familiarise themselves with “raise hands” functions in order to facilitate a Show of hands. Use of a button compared to a physical show of hands ensures a more transparent vote, and a clear sign of members intentions.
- Before any voting takes place the host should ensure all hands are down.
- For Zoom calls attendees can raise their hand as a reaction, the host and co-host can then see who has raised their hand on the list of participants.
- In the case of a secret ballot a virtual poll can be called both in Zoom and Microsoft Teams. For instructions on how to set up a poll in advance or as part of a meeting in Zoom click [here](#). You can find the same information on Microsoft Teams [here](#).

Enabling Quality Debate and Discussion

Members should be advised, both in the meeting invite and at the start of the meeting itself, to be in suitable environment, in private, away from the rest of their household, whilst participating in the meeting to enable them to properly debate, vote on serious and important issues whilst maintaining the privacy of union decision-making.

Video cameras should be switched on as much as possible to replicate as closely as possible an in-person meeting, unless the number of members on the meeting means that video cameras need to be switched off to maintain a stable internet connection or for privacy/safeguarding reasons on the part of the virtual attendee. In any circumstance, the meeting host will need to ensure that the chair’s video is switched on (and the BSL signer if they are on the call).

All microphones should be muted when not speaking.



An explanation should be given about how to speak, either by raising their hand, unmuting their mic or by sending a message directly to the host via the Chat function. The chair of the meeting should make every effort to encourage as many different members to speak as possible; the same member should not typically speak twice in the course of a single debate except to exercise a right of reply or answer a question specifically addressed to them.

An explanation of the chat facility and how it will be used, i.e. for members to share their thoughts with each other, but also how specifically to use it to request to speak. It should be made clear that debate cannot take place through the chat function (as it is likely to be invisible to in-person attendees).

Appropriate technology should be used in order to allow virtual and in person attendees to debate properly. It is important that members can see and speak with each other. Essential equipment includes a projector or large screen to show videos, and a microphone and speaker that can effectively enable conversation.

Support with hybrid meetings

NEU staff can provide support and training on the running of hybrid meetings. If you require any help, contact your regional office.

NEU Behaviour Statement

Everyone attending a National Education Union (NEU) event has the right to expect a space free from bullying, intimidation and harassment; to be treated with dignity, respect and courtesy and not to be discriminated against.

The NEU will not tolerate any form of harassment or discrimination. Members attending an NEU event are responsible for their own behaviour and must ensure they behave appropriately showing respect to others during NEU events and social activities.

Reports of inappropriate behaviour, including behaviour which brings injury or discredit to the union, will be treated seriously and acted upon promptly. Any such behaviour may ultimately result in attendees being asked to leave and/or action being taken against members under the Union's Code of Professional Conduct.

The event coordinator will outline how members can report inappropriate behaviour, and the event coordinator has complete discretion to ask individuals to leave the event.