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IBA Taxes Committee

Quality guidelines for Chairs, Panellists and Panel Reporters

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This version was prepared on 24 September 2026 by Susanne Schreiber, Quality Officer of the IBA Taxes Committee (with thanks to former Taxes Committee Chairs for their input)

Summarised goal

This is the IBA Taxes Committee's quality handbook for planning and delivering conference panels. Its purpose is to ensure panels are practical and interactive – built around experts applying current law to fact patterns rather than sequential country updates or policy speculation, while still supporting the Committee's separate academic and policy work with bodies such as the Organisation for Economic Cooperation and Development, the United Nations and the European Union.

This handbook defines roles as follows: (1) Chairs oversee overall preparation, coordination and moderation; (2) Panellists contribute content, local-country slides and interactive input; and (3) the Panel Reporter drafts the Panel Report.

This handbook offers a number of core delivery tips. These are set out more fully below but include:

- keep intros short;
- 'set the stage' upfront;
- use case studies and examples;
- avoid turning speakers into siloed 'local experts';
- steer clear of theoretical or normative (ie, focused on how things 'should' be rather than how they are) debate;
- ensure each speaker provides a takeaway point; and
- foster dialogue among Panellists rather than routing everything through the Chair.

Below this, there is a section providing guidance for moderating the panel. This covers opening framing, guiding discussion, audience engagement (polls, provocative questions, reserved Q&A time), active time management and closing with takeaways and thanks.

The next section covers presentation standards. It discusses the use of the official IBA template as well as a consolidated deck, an opening slide with speaker details, comparative tables or graphics as opposed to text reproduced from tax codes and using concise content with detail contained within an annex.

The handbook then presents a sample timeline covering preparation meetings, the conference day itself and post-conference follow-up. This detailed timeline sets out four preparation meetings

(kick-off ~3 months out, development ~2 months out, finalisation ~2 weeks out and an on-site rehearsal), conference day and post-panel actions (including a LinkedIn post) and post-conference follow-up for drafting, circulating and signing off the Panel Report.

The final section covers where to send questions to and provides a Running Sheet Template as an appendix.

These guidelines provide practical guidance, tips and suggestions for preparing and delivering high-quality IBA Taxes Committee panels.

1. Purpose

Where practicable, every IBA Taxes Committee panel presentation should be practical and interactive. With the exception of panels that are specifically focused on policy and emerging issues, the objective of each panel presentation is to create a discussion among experts who apply and analyse current or currently proposed law, rather than to provide a sequence of country updates or to create a forum that speculates primarily on future policy or on what the law ought to be. Instead of having one country speak after the other, it is typically more useful to have the speakers apply their country's rules to a specific fact pattern or, if that is not practical, have one speaker describe a tax regime and other speakers interrupt this description with specific questions as if they were in a conversation with the presenter.

Each panel presentation should endeavour to include useful, practical, comprehensive and focused content to provide our membership with a helpful overview of developments, case law, new legislation and practical insights and examples that may be useful for their practice. This goal is furthered by the publication of the accompanying Panel Report.

The IBA Taxes Committee engages in academic and policy-driven initiatives in collaboration with the OECD, UN, EU and various legislative or policy-driven bodies via public consultations, articles and other discourse.

2. General roles

Chairs

- Overall responsibility for the panel concept, preparation, moderation and follow-up.
- Coordination and communication with Panellists and the Panel Reporter throughout the process, including organisation of preparation meetings (ie, assembly of the slide presentation based on contributions from the speakers).
- Chairs moderate the discussion among the Panellists and guide it, but are not expected to provide content and analysis in the same way that a speaker does.

Panellists

- Contribution to the panel material and Panel Report.
- Panel presentation with engaging and interactive input.
- Preparation of local country slides and content for the panel slide presentation.

Panel Reporter

- Preparation of the Panel Report.

3. Delivering a practical and interactive panel

- **Keep non-substantive content short**

As panel duration is relatively short (as short as 45 minutes to as long as 90 minutes), please keep speaker introductions short. Prepare a short and punchy introduction for each speaker setting out their name, organisation and country. The exception may be any government, quasi-government or in-house speaker where specific roles and unique background are likely to be important context for the audience, and also to show our appreciation for their participation.

- **Set the stage**

Beyond the panel description and speaker introduction, start the panel by explicitly telling the audience what the panel is about and what topics will be covered. Telegraph some of the issues/takeaways.

- **Use case studies, examples and samples**

Case studies, examples and samples are well-received by the audience and an excellent medium for delivering practical and interactive content.

Consider basing the panel presentation or a material segment of the panel presentation on case studies that the speakers from different jurisdictions can comment on from their perspective.

Consider referring to real examples of transactions in the marketplace (to the extent possible and without creating a legal or business conflict for speakers).

If the panel lends itself to it, consider providing sample provisions for an agreement or otherwise that might address an issue or risk.

- **The objective is not to make the audience into local country experts**

Remind Panellists that the vast majority of the audience are likely people who are not from their own jurisdiction.

If a comment or concept is not immediately or obviously translatable, ensure that either the context or an explanation is offered (eg, this is important to a non-resident investing in country X because..., as a non-resident resident of country X your client needs to be aware of this because..., etc.,).

Ensure that speakers do not invest a great deal of time engaging in discrete and uniquely domestic technical analysis. You may need to interrupt or move the speaker along. The general objective is to identify an issue, identify the applicable law and any key problems and possible solutions or interim general advice.

- **Avoid theoretical and normative discussion**

Unless the panel is uniquely centred on policy or includes speakers from government or quasi-government, avoid discussions that are centred around what the law might be or ought to be. This is distinct from speculating as to how a court or appellate court might decide on an issue or current case before the courts based on existing facts and law.

- **Identify and deliver key takeaways**

Each speaker should provide at least one key takeaway during the course of the panel that is intended to resonate with practitioners who do not practice in their jurisdiction. Assemble and summarise the key takeaways at the panel's conclusion.

- **Encourage and build a dialogue among speakers**

Encourage the speakers to respond to each other and their points/analyses instead of circling back to the Chair each time. This will require some coordination during preparation sessions to find those natural points for direct engagement and response.

4. Guidelines for moderating the Panel

- Start with a brief introduction on the topic and an introduction of the Panellists and Panel Reporter.
- Guide the discussion.
- Use live polls or show of hands to engage the audience.
- Prepare two or three provocative questions to stimulate the debate.
- Reserve at least five minutes for an audience Q&A.
- Manage time actively.
- Encourage audience questions, make reference to other panels and connect dots between Panellists, where necessary.
- Conclude with key takeaways.
- Thank speakers and the Panel Reporter.

5. Presentation standards

- Use the official IBA template, as provided for the specific conference.
- Ensure the slide deck is consolidated.
- Include an opening slide with photos, names, firms/organisations and contact details, including of the Panel Reporter.
- Use comparative tables where useful, graphics to illustrate cases and clear and concise text. Avoid reproducing tax codes or similar detailed provisions; instead, indicate the relevant sources (eg, court case numbers, legislation and guidelines).
- Keep presentations practical and concise, including useful information (case numbers, dates, status of developments, etc) and, where helpful, more detailed information in an annex (eg, detailed local country content might be organised in an appendix for the audience's consumption after the conclusion of the panel).

- Create concise and visually impactful presentation slides, emphasising key takeaways and audience engagement over dense text and lengthy legal references. Make use of modern tools (including AI solutions) to create more dynamic and compelling sessions.
- Further guidance and practical examples are available on the IBA website under ‘Conference Quality Committee Videos’ at www.ibanet.org/LPD/Conference-Quality-Committee-Videos
- Submit supplementary material for the conference where appropriate.

6. Sample timeline of preparation meetings, conference day and post-conference follow-up

Timeline	Topics	Who
Before starting the preparation process	<ul style="list-style-type: none"> • Work with quality officers to identify and resolve overlaps with other sessions, under the coordination of the vice-chairs (or conference chairs in specialist conferences). • Onboard the Panel Reporter as early as possible (by reaching out to the officer responsible for reports). • Organise preparation meeting one; share quality guidelines with Panellists/Reporter. 	Chairs
Preparation meeting #1: Kick-off Conference day minus approx. three months	<ul style="list-style-type: none"> • Introduce Panellists and Panel Reporter. • Agree on objectives and topics. • Allocate responsibilities. 	Chairs, All
	<ul style="list-style-type: none"> • Provide input on topics and possible interaction with other Panellists for the session, with a focus on differences and similarities between the countries. • Brainstorm on possible case studies, examples and samples. 	Panellists
One week after meeting #1	<ul style="list-style-type: none"> • Share template with discussed topics/agenda and Panellists slide. 	Chairs
One week before meeting #2	<ul style="list-style-type: none"> • Share first draft slides in the group (including personal information and pictures), in compliance with presentation standards. • Provide input to other Panellists’ slides on time. 	Panellists
	<ul style="list-style-type: none"> • Consolidate draft slides. 	Chairs
Preparation meeting #2: development Conference day minus approx. two months	<ul style="list-style-type: none"> • Discuss status of slides. • Streamline/structure content. • Discuss ordering. • Determine tasks for next version. 	Chairs, Panellists
One week before meeting #3	<ul style="list-style-type: none"> • Share reworked slides. 	Panellists
	<ul style="list-style-type: none"> • Consolidate reworked slides. • Optional: Share slide draft with the IBA Taxes Committee Vice-Chairs or Quality Officers (for them to identify potential overlaps). • Prepare and share running sheet (time allocation) and consider/ suggest ordering and segues based on jurisdictional links/similarities/ points of departure. 	Chairs
Preparation meeting #3: finalisation Conference day minus approx. two weeks	<ul style="list-style-type: none"> • Incorporate Vice-Chairs’ or Quality Officers’ feedback into the slides. • Discuss and finalise slides. • Confirm running sheet, including handovers (with speaker-to-speaker handover and direct engagement emphasised). • Organise logistics for the conference. 	All

Conference date minus approx. five business days:	• Final slide deck locked – no further changes.	All
	• Send final slides to IBA.	Chairs
Preparation meeting #4: on-site rehearsal (at conference venue, ideally the evening before or morning of conference day)	<ul style="list-style-type: none"> • Walk through slides. • Discuss interaction points/questions and handovers, with reference to the running sheet. 	All
On conference day: panel	<ul style="list-style-type: none"> • Introduce the topic, Panellists and Panel Reporter. • Moderate the panel (complying with the guidelines on moderating the panel). • Manage time and transitions (based on the running sheet). 	Chairs
	<ul style="list-style-type: none"> • Interact with fellow Panellists rather than delivering standalone presentations. • Respect speaking times. 	Panellists
	<ul style="list-style-type: none"> • Attend the conference session, capture key discussions, developments and insights for preparing the Panel Report. 	Panel Reporter
On conference day: post-panel	<ul style="list-style-type: none"> • Arrange a group photo after the panel for LinkedIn and IBA communications. 	All
	<ul style="list-style-type: none"> • Publish LinkedIn post. 	Chairs
Post-conference follow-up (one–two weeks after conference day)	<ul style="list-style-type: none"> • Prepare the Panel Report. • Circulate the draft to the Chairs and Panellists for review. • Submit the final Panel Report to the officer responsible for reports. 	Panel Reporter
	<ul style="list-style-type: none"> • Review and sign off on the Panel Report. 	Panellists/Chairs

7. Questions and contact

For questions regarding this handbook or the preparation process, or if you have any input to improve it, please contact the Quality Officer of the IBA Taxes Committee.

Appendix

Running Sheet			
Title			
Date			
Total minutes:	75	input	
minus questions / handover / Chair	10	65	
Number of Panellists	6		
Time per Panellist	11		

Slides	What	Who	Start	Finish	Minutes
1-4	Introduction	Chair / Introduction	8:30	8:32	0:02
5	Topic 1	Chair	8:32	8:33	0:01
6-8		Panellist 1	8:33	8:38	0:05
9-10		Panellist 2	8:38	8:41	0:03
11-12		Panellist 3	8:41	8:45	0:04
13		Panellist 4	8:45	8:47	0:02
14	Topic 2 / Handover	Chair	8:47	8:48	0:01
15		Panellist 2	8:48	8:50	0:02
16-17		Panellist 4	8:50	8:54	0:04
18		Panellist 5	8:54	8:57	0:03
19-20		Panellist 6	8:57	9:01	0:04
21	Topic 3 / Handover	Chair	9:01	9:01	0:00
22-23		Panellist 4	9:01	9:06	0:05
24		Panellist 2	9:06	9:08	0:02
25		Panellist 3	9:08	9:10	0:02
26		Panellist 5	9:10	9:12	0:02
27-29		Panellist 6	9:12	9:17	0:05
30	Topic 4 / Handover	Chair	9:17	9:17	0:00
31-32		Panellist 3	9:17	9:22	0:05
33-35		Panellist 5	9:22	9:27	0:05
36-38		Panellist 2	9:27	9:31	0:04
39	Topic 5 / Handover	Chair			0:01
40-44		Panellist 1	9:31	9:37	0:06
		Panellist 6	9:37	9:39	0:02
45	Summary	Chair	9:39	9:40	0:01
46	Questions	Chair / All	9:40	9:45	0:05

Total speaking time		
	Chair	0:05
	Panellist 1	0:11
	Panellist 2	0:11
	Panellist 3	0:11
	Panellist 4	0:11
	Panellist 5	0:10
	Panellist 6	0:11
	Questions	0:05
		1:15



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International Bar Association
Chancery House, 53–64 Chancery Lane
London WC2A 1QS, United Kingdom
Tel: +44 (0)20 7842 0090
Fax: +44 (0)20 7842 0091
www.ibanet.org