

VIRTUAL CONFERENCE 2019 FEEDBACK AND EVALUATION

Background

1. Tax Justice Network hosted its first virtual conference: *Where next for Global Taxing Rights? Technical and political analyses of the OECD tax reform* on 12 December 2019.
2. The conference was a trial run at using technology to host a virtual event that could go some way to fulfilling the aims of our annual in person conference, in terms of knowledge sharing, collaboration and influencing opportunities.
3. This paper will review the success of this tool, consider whether this tool should be utilised more in the future and make recommendations for the smooth running of any future conferences.

Logistics and planning

4. The date we decided to commit to the conference was approx. 7 weeks in advance of the conference which gave little spare time for technical challenges or non-conference related reactive work.
5. The timeline for these 7 weeks including key tasks and an estimation of the time involved are as follows:

Week commencing	Tasks	Estimate weekly total
21/10	Planning meeting	
	Setup airtable plan	
	Produce conference flyer / blurb	
	Produce draft conference agenda / ideal speakers	10 hours
28/10	Initial invites to speakers	
	Comms planning meeting	5 hours
4/11	Chasing and confirming speakers	
	Planning agenda	5 hours
11/11	Set up crowdcast platform and website	
	Advertise event on social media, website, mailerlite	
	Planning meeting, firming up agenda	15 hours
18/11	Produce speaker packs, liaising with speakers	
	Produce conference banner	
	Finalise agenda and produce public version	15 hours
25/11	Testing crowdcast, Setup zoom and OBS replacement, heavy testing	
	Produce full programme	
	Produce slack content plan, collate papers	
	Liaising with speakers	30 hours
2/12	Tech testing with speakers	
	Advertise again	
	Pre event blog	40 hours
9/12	Tech testing, confirm final speaker instructions	
	Carry out event	
	Post event wash-up	30 hours
	Total	150 hours / 20 days

6. The above breakdown refers to operations time which took on most of the logistics and some comms work. On top of these days, the following time was used by additional staff members:
 - 4 days Directors time – leading on content and hosting event
 - 3 days Ops Director time – supporting on ops
 - 3 days Comms time – social media, blogs, attending event, banner design
 - 1 day - Comms – slack moderation
7. Due to the short timeline and some non-related reactive work in the earlier weeks, as well as some technical issues with the platform, the final 2 – 3 weeks ahead of the conference were very time intensive and required some overtime to be worked for the conference to be delivered to an acceptable standard. In future we could better prepare by starting the project earlier – ideally at least 12 weeks in advance of a conference.
8. Some operations time was dedicated to setting up the platform first time around, testing, and implementing an alternative solution, and so would be reduced for future conferences as we now know the technology capabilities. For similar future conferences I would expect ops time to be reduced by approx. 3 – 5 days from knowledge learned, and more so if we were to engage an additional person on the research side to help with content generation.
9. The conference generated a total income of £550 after paying ticketing fees. The total costs incurred are below totalling £319 giving a net profit of £231. Some of these were one off costs like the equipment purchased for the host and travel expenses for ops team to be onsite together (this was to reduce risk but will not be necessary for future conferences). Therefore, core costs for future conferences could be as low as £133.

Item	Cost
Crowdcast streaming platform – 2 months (Non-profit discount)	£106
Zoom Pro account upgrade 1 month	£27
Operations Associate travel expenses for the day of conference	£136
Logitech external mic / webcam for host	£50
Total	

Technology

10. The original plan was to use the [Crowdcast](#) platform for all speakers to connect, however during the initial tech tests the platform presented a number of challenges for different speakers. Some speakers experienced audio issues, others had trouble appearing on screen when added by the host, due to pop-up blockers restricting the use of webcam/audio. Whilst these issues were generally resolved after time invested diagnosing and fixing them, the variety of issues experienced in testing led us to look for a more reliable solution for the live event.
11. As well as this, some speakers from large international organisations were unable to access Crowdcast due to the firewall restrictions set by their IT department and could only access their preferred conference call supplier. For this reason, coupled with the issues in initial testing it was decided to move the panel discussions to [Zoom](#), a platform we use inhouse and know to be reliable for quality call connections, and as a market leader they are the preferred supplier for many large organisations.
12. It was decided we would stream the Zoom panel discussions via [Open Broadcast Software \(OBS\)](#) to the Crowdcast RTMP Studio which made connections with speakers more reliable and meant there was no change to the way our audience engaged with the conference. We were keen to still use the CrowdCast platform due to its user-friendly interface and built-in tools that allow the audience to easily engage with speakers such as polls, chat function, ease of asking and upvoting questions, and joined up approach to navigating through the conference sessions. By streaming Zoom calls we were able to have as many panellists ‘on stage’ as we wanted at any one time (whereas Crowdcast has a restriction of 4), but lost the ability to invite audience members on stage.

13. We also had to upgrade a Zoom account so that we could use three zoom pro accounts to run the calls on the day uninterrupted.
14. The zoom test calls ran smoothly. The screen share function presented a challenge to some of the delegates who were presenting slides, but in general they were able to be coached on how to do this. In the live environment this caused slight delay while speakers found their slides, but was probably less disruptive than an admin account showing the slides and moving them on when prompted by the speaker.
15. The physical infrastructure necessary was for a laptop/PC to launch the zoom calls, or two separate laptops if the zoom calls overlapped in time. For this conference this was necessary as we needed to gather the speakers for session two in the virtual green room, whilst the first session was still running. Further to this we needed an additional laptop to stream the zoom calls via OBS software to Crowdcast, which was then out of action for any other tasks. Then additionally both ops team members used another laptop to work on, send emails and watch the Crowdcast stream. In total then 5 computers and 2 staff members are essential on the day to the smooth running of a similar event, though recommendations for additional staffing on the day are made below.
16. The conference was streamed via OBS on one laptop and was reliant on Will's broadband. Whilst this held out for us on the day we noted it was essential to have a backup plan in place for internet outage at future conferences. For this conference we asked that Mark be on standby to take over the stream if necessary. This would involve Mark dialling into the specific zoom call, streaming it via OBS software, logging into the Crowdcast main account and setting up RTMP Studio. Whilst we did not test this, we estimated this would incur 10 – 15 minute downtime in the conference.
17. The operations team ran the event from Will's home office in London. It was decided that it would be better run from one central hub so that we could communicate more easily and share tasks and troubleshooting as needed. This was beneficial for spreading risk in case we had a tech issue or needed to track down a speaker. Though once we are more experienced in running these events a full virtual setup could be used.
18. In the live environment all except one speaker's video and internet worked as expected, which resulted in that speaker turning off their webcam as the internet was unstable. This was the only connection we were unable to test in advance of the conference. The host's internet also had a temporarily outage on the morning of the event and we needed to think of a plan B had it not have come back up in time. In future it would be useful to include a note on this in the speaker guidance packs so speakers have a backup plan should their internet go down, as well as asking that speakers add a photo into their zoom profile in case they need to turn off their camera.
19. The [Logitech C920 HD Pro Webcam](#) we purchased for Alex as the host at £49.99 improved the quality of his recording significantly. Given it's price it was well worth the money and should be opted for in future for any staff member hosting or moderating similar events.

Session formats on the day

20. The conference was organised in three parts and therefore uploaded and shared as three videos in the replay materials, the description and breakdown of these are listed below:
 - **Session 1 – 35 minutes – Welcome and keynote**
 - i. 7 minute intro from host - Alex Cobham
 - ii. 18 minute presentation – Jayati Ghosh
 - iii. 10 minute Q&A session
 - The time allowed for this session felt about right with both speakers having enough time to carry out welcomes, the presentation, and have enough time for a few follow up questions. The length of the session is also useful for sharing and replaying the session after the event.
 - **Session 2 – 1 hour 49 mins – Panel discussions with technical presentations**

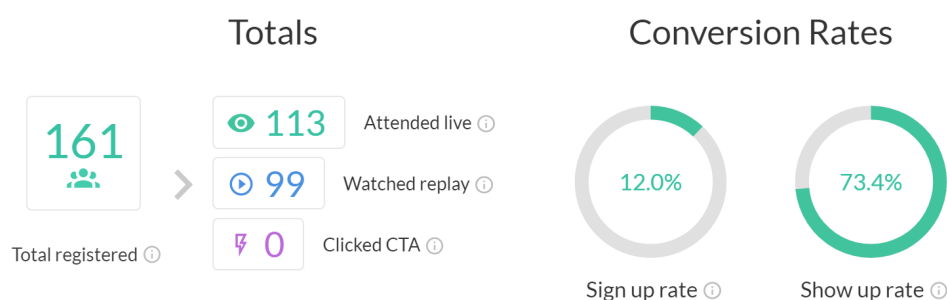
- i. Intro from host/moderator – 5 mins
 - ii. 3 x technical presentations – OECD, IMF, ICRICT – 18 mins, 18 mins, 15 mins (scheduled 10 mins each)
 - iii. 3 x discussants – 15 mins, 8 mins, 7 mins (scheduled 5 each)
 - iv. Q&A 20 minutes – only included first 3 speakers
 - The session overrun by a significant amount as every speaker spoke for a longer time than agreed. Alex made a call to let the speakers continue with this approach rather than intervene as many of the presentations contained new information that we prioritised over a full Q&A and it is useful that we can work in this dynamic format, though in future we could better plan for this by splitting the sessions further.
 - An alternative format for this session would be to split each of the presentations into a standalone session themselves including 15 minute presentation, followed by 10 minute Q&A. And then to go to a panel discussion with presenters and discussants giving feedback and engaging in a more meaningful audience Q&A. This would also make the material more accessible for sharing and viewing post conference.
 - There were a lot of white men on this panel and not enough diversity among speakers and opinions- recommendations to address this are made below.
 - **Session 3 – 1 hour 32 minutes – Policy session looking further ahead and second keynote**
 - i. Intro from Alex - 1 min
 - ii. Intro from moderator Stephanie – 3 mins
 - iii. Keynote presentation G24 – 20 mins
 - iv. 4 panellists responding to question posed – 24 minutes total, avg 6 each
 - v. 40 minute Q&A session
 - Stephanie did a great job moderating, keeping the discussion lively and energetic. She also did a good job signposting the format of the session and it worked well asking all the speakers for their thoughts on the same question. This meant the session was easy to follow and felt fast paced. The Q&A session was long enough to turn into a sort of informal conversation between speakers, and we moved to a 6 person split screen to provide a visual alternative for the audience.
 - Though this was a big panel – the moderation, the experience of the speakers, and the short interventions without slides meant it hung together well.
21. For future conferences we should think about the distinction between presenters showing slides and discussants giving their take on a particular topic. For this conference all presentations took roughly 20 minutes and could have worked as 25 - 30 minute standalone sessions of presentation plus 10 min Q&A. This would mean all content is sufficiently engaged with and queried, and gives the audience an accurate account of the day's agenda. Further it will make the programme more interesting, offering a variety of content formats throughout the conference, rather than solely panel discussions.
22. Whilst the second panel felt dynamic and engaging it was still a large panel with 6 delegates. In future we should consider varying the sizes of panels with 4 delegates being the ideal from an optics point of view, but also considering alternative formats like debates between two opposing viewpoints with a moderator chairing.
23. The audience engagement tools such as upvoting questions, sharing polls, moderating the forums and posing questions to the audience were under-utilised. These interaction channels are important for online conferences and can assist in helping to create the networking and engagement aspects of conferences lost online. These were largely underutilised because of resources, but future conferences would benefit from 2 chat room moderators available on the day and preferably in the run up to the conference, that can also ask prepared questions to encourage engagement from the audience. Additional time should be spent preparing these questions and polls in advance of the conference so the team can attempt to foster discussions with early interventions.

Slack channel

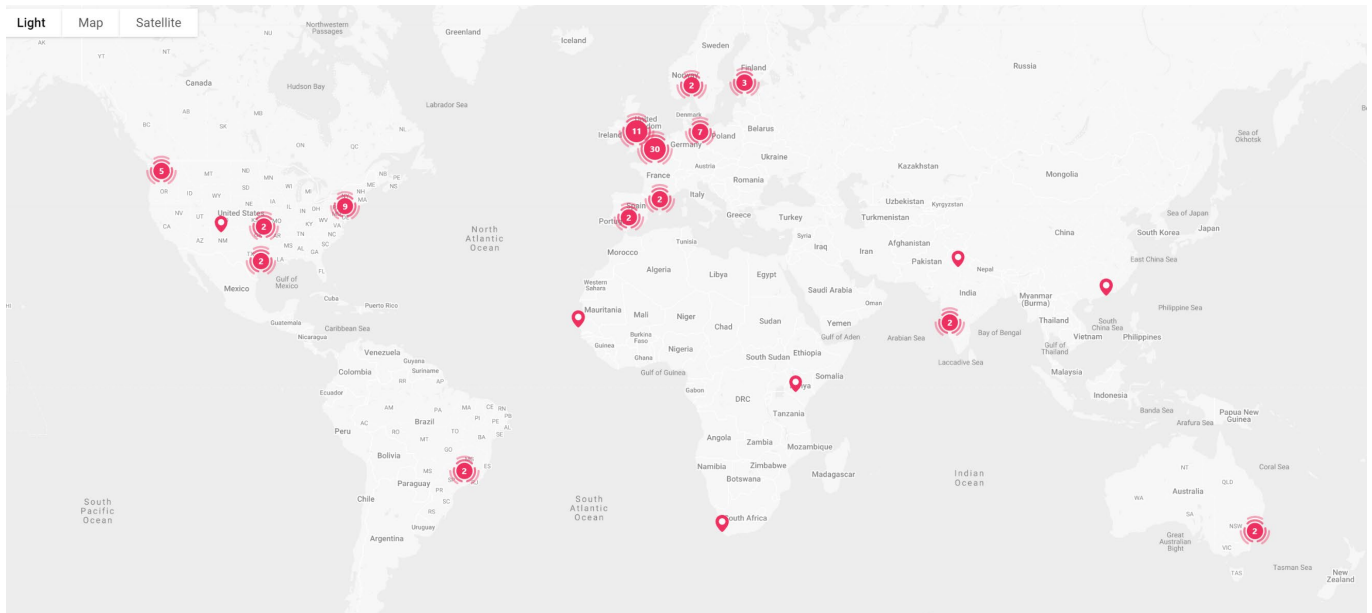
24. The conference slack channel was not widely used by delegates. From the feedback survey 50% said they did not use it and roughly 30% said they found it useful in some way.
25. Whilst it was useful to have a space to gather papers and conference material together, this failed to foster in-depth discussion between delegates and was mainly used by TJN staff to post material.
26. This could be utilised better in the future if moderators are brought into discussions and fully briefed on content earlier, and able to lead discussions and debates on the topic at hand, which unfortunately did not quite come off due to limited time ahead of the conference to brief moderators on content and plans for the day.
27. Whilst this may make engagement higher in future, it could also be the case that many people do not regularly use slack as we do at TJN, and so would only receive updates when going specifically to the webpage and not habitually checking as we would hope. This does not mean it could not be trialled again in future, with a bigger push for people to join and download the app, and with more regular content and interactions to encourage people to use it more. We could also consider alternative virtual tools that may go some way to filling the networking opportunities and hallway chatter gained from in person conferences.

Analytics

28. In total 161 delegates registered for the event of which 126 paid \$6 for the event, others registered were speakers, staff members and journalists.
29. Key metrics from Crowdcast are below:



30. Of the 113 that attended live:
 - 95 delegates attended the 1st session – Welcome and Keynote I: ‘The maldistribution of global taxing rights, and how to fix it’ and Q&A
 - 106 delegates attended the 2nd session – Panel I: ‘The revenue impacts of redistributing taxing rights’ and Q&A
 - 87 delegates attended the 3rd session – Keynote II: ‘The G24 proposal, and the challenges of the Inclusive Framework’ and Panel II: ‘Which way now for the reform and redistribution of global taxing rights?’ and Q&A
31. In addition to the metrics above, the three videos have been viewed on YouTube in first month as per below:
 - Session 1 – 72 views
 - Session 2 – 58 views
 - Session 3 – 33 views
32. Participants to our virtual conference joined from 38 different countries. The wide reach of the conference meant that some participants on the east coast of Australia stayed up late to 2:30am local time to join in, while those on the west coast of the US got up early to join in at 6:00am local time. Here’s a map of where conference participants were based.



Feedback and impact

33. Feedback from the survey – survey take-up was low with just 14 respondents, 2 of which were staff members. The overall star rating was 4.5 out of 5 stars, and useful comments are below:

34. Positives:

- Virtual platform actually made it easier to hear panellists & even engage with them via the questions device.
- V good chairing & summary.
- Much easier for big names to attend: rather than give 2 days for travel etc., they can give an hour
- was great, was able to listen in to some really informative speakers from my desk, and catch up on this important area of developments in tax justice.
- The fact that it was a virtual conference made participation easier; I would probably not have been able to participate in the conference if it had been "conventional" due to financial and time constraints.
- many exciting and informative posts from competent professionals. part one could be better facilitated - like Stephanie S. J. did in part two.

35. Negatives:

- Questions/polls underutilised.
- Perhaps the virtual format is less amenable to informal debate/ interjection (eg I was suspicious of the apparent level of consensus at the end but couldn't really see a route to interjecting on that). So perhaps greater consideration could be given to participation methods for next time.
- Downsides: the personal touch is useful, and meeting people is useful. But heavily outweighed by the positives.
- VC cons: Little networking opportunities came up repeatedly as the main conference con.

36. In response to improving access two participants raised whether there should be a charge to attend (one staff member and one other), so this should be debated for future conferences.

37. In response to improving diversity the following comments were made:

- Not so many white men. More people from Africa.
- Could it be possible to include more qualitatively-minded social scientists? (Historians and fiscal sociologists?) I think it would make sense to put the current remaking of international tax rules into historical perspective in order to explain how important and unprecedented it is.

- It would have been interesting to hear contributions from members of tax authorities from the global south on implementation issues and other concerns.

38. Other useful feedback to consider:

- High profile Journo on the panel, in addition to moderation the was great. Media outlet eg. 'India Times' Tax Notes sponsoring a panel (not a monetary sponsorship.)
- Maybe permissions given in advance of the conference during registration can help virtual networking. Some pre/post conference networking rooms maybe facilitated by expertise in an area. BO networking 'room's gets the BO geeks + new to people together

Recommendations for future conferences

Logistics and staff

39. Time considerations: Where possible allow more time. This conference had to be timely alongside the OECD timeframe so had to be turned around quickly, but an additional month would have allowed more time to plan, advertise and target our specific audience, as well as providing contingency time for necessary reactive work and challenges. However, we should still go ahead if only a short time frame is possible. This conference showed in can be completed in around 6 weeks (for a half day 5 hour conference), but delivery of a high quality conference would be less risky with more time allowed, or more team members involved, and engagement and influence would likely be higher.

40. Staffing: For future conferences of a similar duration we should allow roughly the below staff time:

Staff required	Tasks	No of days
Operations	Project management, logistics and delivery of conference- coordinating programme, technology, speakers, content and comms activities	10 – 12 days
Director or researcher time	Develop session content and programme, blog, advise on speakers, sign off on material, host event	4 - 6 days
Comms or ops	Produce event material – agenda, programme, web updates, audience build	3 – 4 days
Comms or research	Assist with content generation for slack and other online forums, social media, blog, in run up and on the day of conference (Ideally 2 people)	2 – 3 days
Ops director	Oversee and attend, on the day support	2 days
Additional	For large events we could produce additional products like pre video conference Q&A, infographics, conference branding of the live videos etc for additional comms / research days	

Technology

41. The technology setup we settled on – using zoom to stream each session individually, then broadcast via the OBS software to the crowdcast platform was a good approach, it proved reliable and meant the audience interface was user friendly, with minimal tech complaints and people easily able to interact and ask questions.

42. Some additional tech advice to give to speakers for future conferences is:

- Identify a backup internet line in advance in case of internet outage on the day
- Update zoom profile with a headshot
- Speakers, host and ops team to close or silence messaging apps (like Slack) before joining live environment

43. For future conferences have at least one, or preferably two, back-up internet connections / separate locations with OBS setup in case the internet goes down, test this in advance of the conference.

Session formats

44. Future conferences should aim to use a variety of session formats and break sessions down where possible so that the programme is accurate to session run times, some formats to vary are:
- Single presentation followed by Q&A – 25 mins (presenter and moderator)
 - Single case study / storytelling session / interview with Q&A – 25 mins (presenter and moderator)
 - Debate on topic – 45 mins to 1hr (2 differing views plus moderator)
 - Panel discussion – 1hr – 1.5hr – (3 – 5 people plus moderator) – works better with quick interventions, keeping slides to a minimum or separate where possible

Networking and slack

45. Feedback highlighted networking opportunities were lacking, and whilst this is a difficult barrier to overcome virtually, we can attempt to improve on this next time round. Some suggestions are below:
- Push the slack channel more often and earlier on (providing we have moderators fully prepped on content). Not everyone uses this on a regular basis as we do so we could encourage more people to download the app and engage with it earlier on by posting more thought-provoking content, more often.
 - Consider hosting a before and/or after mass networking session via a zoom call. This could be off the record discussion where we talk informally about what the conference will cover, and some of the questions we hope to pose to our panellists. We could pose questions to participants and split them into breakout groups of 6 – 8 to come up with a group answer and feedback. Then can exchange details with their group if they want to continue discussion. Same format could work for post event to discuss some of the outcomes and important next steps and dates.
 - Consider benefits of other networking apps or slack multi-channel access so we can theme channels or set them up for each session.

Improving diversity and inclusivity

46. As both GATJ and ATRN speakers were unable to attend we were under-represented by speakers from the global south. For future conferences we should prioritise similar organisations and engage them earlier in the process and only schedule a date when we secure engagement from key organisations.
47. Consider a global south partner earlier and/or ask one or multiple global south organisations to lead on sessions in the conference.
48. Feedback comment: We must factor in hubs for global South participants. We could find partners for this, eg existing media hubs (places where media orgs collaborate to share decent internet connections, such as Ecofin in Cameroon) with access to a good Internet connection.

Other feedback and comments

49. Timing of international conference is important – because of the wide reach of the audience we hope to engage we should always aim to work within the hours of 12pm - 6pm, unless region specific. If we wanted to extend beyond these times, we should split the conference over two days.
50. The feedback survey take-up was low, we should send a reminder email about this in future and stress in closing comments as it's useful to measure improvements on the first conference. We also need to review this and reduce the number of questions.

Media coverage

U.S. Global Tax Suggestion Is 'Urgent' Issue: OECD Official <https://news.bloomberglaw.com/daily-tax-report-international/u-s-global-tax-suggestion-is-urgent-issue-oecd-official>

Global Tax Proposals Neglect Developing Countries, OECD Told <https://www.law360.com/tax-authority/articles/1226961/global-tax-proposals-neglect-developing-countries-oecd-told>

OECD Aims to Publish Global Tax Reform Analysis in Early 2020 <https://www.taxnotes.com/tax-notes-today-international/tax-policy/oecd-aims-publish-global-tax-reform-analysis-early-2020/2019/12/12/2bp6c#.XfHvYdlunAl.twitter>