People/Firm Impact - Tax Firm Contribution Snapshot Guidance

WHAT IS A FIRM CONTRIBUTION SNAPSHOT? All Tax professionals are expected to participatein, manage, or lead non-engagement specific activities such as recruiting, training/learning, inclusion, innovation, marketplace eminence, operational excellence, and/or other activities that make a meaningful impact on the development of our people and success as a Firm.

To capture the impact you've made in these areas, submit a firmcontributionsnapshot in iRPM to the relevant team leader, just as you would a performance snapshot. If you have at least two completed firm contribution snapshots (and a sufficient number of peers with snapshots), you will receive a Firm Contribution Snapshot Summary.

WHEN DO I REQUEST A FIRM CONTRIBUTION SNAPSHOT? You should request firm contribution snapshots throughout the year for work greater than or equal to 20 hours. However, you may request a snapshot for less than 20 hours for roles in which you added significantvalue. Consider the role and valueyou provided outside of your core responsibilities to ensure it supports the need for a firm contribution snapshot.

HOW IS FIRM CONTRIBUTION DATA CAPTURED AND CONSIDERED AT YEAR END? Your My Firm Contribution Snapshot Summary is a direct input into the People/Firm Impact Statement that you receive at the end of the year. Leadership uses the Impact Statements to understand the level of value each professional has made compared to their peers. Impact Statements are key inputs to a variety of Talent decisions, including compensationand promotions.

Theme	Examples	Team Leaders
Purpose, Inclusion, and Community	• Local Office Community program or Impact Day lead • Inclusion council • Peer Group events (i.e. WIN, etc)	• L70, LL, LMD, or LPP sponsor or project leader • Council or group leader
Marketplace/Eminence	• Proposal, pursuit work • Marketplace meetings • Presenting/developing content for a conference	• Engagement, local practice or project leader
Operational Excellence	• Improvement of client invoicing process • Intela office champion	• OTMP or local practice leader
Recruiting	• Campus Recruiting activities • Intern cohort leader	• Lead Campus L70, LL, LMD, or LPP • OTMP or local practice leader
Learning & Development	• Course facilitation • Creating/presenting local practice learning	• Talent leader or project Leader • OTMP or local practice leader
Well-being Activation	• Local well-being champion • Well-being council	• Talent leader or project Leader • OTMP or local practice leader
Other Contributions (specify in comments)	• Proposal work with US/USI or a member firm	• Engagement, local practice or project leader

Remember!

- Firm contribution snapshots should reflect work that made a significant, meaningful impact
- Submit your snapshot to the team leader who had the best visibility into your work and the impact you made
- Talent professionals (Recruiting, etc.) are NOT considered team leaders for purposes of completing firm contribution snapshots

People/Firm Impact - Additional Guidance for USI Staff (coaches and coachees)



WHAT DOES PEOPLE/FIRM CONTRIBUTION MEAN FOR USI STAFF?

- The USI business model demands a high focus on client deliverables and other operational metrices at staff level, and as one progresses level wise the firm and people contributions become more impactful. USI-specific performance evaluation structure allows the impact areas to vary across career levels.
- Keeping above in mind, for USI staff level, the People/Firm contribution is non-evaluative. However, USI staff can participate/ continue to work in any firm initiative if it is something that interests them.
- As one progresses to L40 and above, People/Firm area will become evaluative. People/Firm contribution will help to widen the scope of learnings and contribute to professional development.

Examples

For USI L40 and above, please refer to the table on thepreviouspagefor Firm Contribution examples as the examples are applicable for both US and USI.