

Career Sustainability: The New Essential Power Skill
 2023 ACCOUNTING MOVE PROJECT REPORT

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Career Sustainability: The New Essential Power Skill

How does today's professional woman sustain a career in a dramatically changing and unpredictable workplace? What supports are in place to help her successfully merge personal and professional lives? What tools are available to navigate the changing cultures in accounting firms that are also trying to thrive? These are the questions facing nearly every working woman today.

So how do these women, how do any employees for that matter, pace their careers in an era of rapid and unpredictable change?

Enter the new “super skill” – career sustainability – applicable to women and the firms for which they work. For women, career sustainability addresses the capacity to maintain motivation and energy at every step, all the while rebalancing the personal and professional with each new engagement.

For firms, career sustainability engenders a leadership culture, defining new capabilities, qualifications, and measurements for unmapped growth.

For both women and firms, this super skill becomes the ability to “skate to where the puck is” on slanted ice through upended physics.



Prior Accounting MOVE Project reports had a two-pronged focus: encouraging the drive to convert emerging client expectations and desires into fresh opportunities that mesh with women's needs for new ways to advance, and encouraging firm leaders to develop career paths that offer context and resources for self-directed advancement.

Not so long ago, it was easy to pace these career paths and progress. The milestones were clearly defined, the finish line bright and sharp, and the outcome predictable.

That was then. This is now.

Clinging to the old way of doing business is not an option. Change continues to evolve in hyperdrive. There are few exceptions to that reality. Mutual respect remains paramount, and there is an inescapable legacy of the workplace upheaval of 2020 and the COVID-19 pandemic.

With this as backdrop, the Accounting MOVE Project is refocusing on the underlying dynamic:

- How can women and firms maintain – or even increase – momentum?
- What is the return on investment for these shifts?
- How are they measured?

Keeping productive professionals is mission critical.

The profession's escalating talent crisis threatens its collective capacity to provide one fundamental function – audits – to clients.

Pinched between immediate capacity shortfalls and applying talent to innovation, firms are crafting new ways to recognize and reward women's resilience.

The power to arrange the time and place of one's workday is now de rigueur. Winning solutions must go beyond ground-level workplace flexibility. Sustainability requires firms blend self-determination with energy and mission management. These companies must infuse the what gets done with the when and how, with the why – for women, their families and their workplaces.



Sustainability elevates women's experiences as an essential thread in a firm's ongoing narrative about its commitment.

In the past, women's stories have followed one of two tracks, either providing tips for everyday life or attempting to inspire the next generations. Now, women's experiences as professionals, lifelong learners, and sources of guidance for all colleagues are more multi-faceted and vital as firms synchronize their goals with those of women professionals.

Career sustainability also elevates another longtime MOVE Project priority: the best practice – exemplified by MOVE Project stalwart [Clark Nuber](#) – of outlining career paths in the context of self-evaluation and on-demand training. Career path clarity clears the way for women to assert their aspirations when the right moment emerges.

When combined with experiences of women colleagues, career pathing is infused with fresh relevance. Hearing a colleague's story of combining an opportunity with skills training can prompt a woman to focus on her next step, says Sharon Williams, human resources manager with [KWC CPAs](#), and “catalyzes their ability to respond quickly when they see how it fits on their career path.”

Sustainability as a superskill centers around recognizing incremental

advancement at meaningful milestones, and regularly remixing professional goals, workload, and preparation for next steps. The magic in this mix rebalances potential, progress, and pacing so women can refresh their energy and vision for each new career step. After all, sustainability is about more than avoiding exhaustion. It is about rolling professional maturity into each new phase with energy, enthusiasm, and insight.

Couple this with momentum and it becomes a winning message for positioning the profession with women who know that their lifelong economic security is a long game. Those in the accounting and advisory spheres are intent on getting a perpetual return on their skills and credential investment according to Accounting MOVE Project research.

Where is the win for firms?

This messaging converts gender diversity into a market differentiator when competing for clients and talent, states John Kenning, manager of people technology and total rewards at [GHJ](#).

In the midst of an unprecedented talent shortage that threatens the very ability for firms to perform their most essential functions, women will gravitate to those firms that integrate sustainability into their cultures and brands. That segues with the firm's newly clarified career paths and hybrid work culture to retain ambitious young women who anticipate professional advancement on their own terms.

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“More and more of my clients are women, and diverse,” says Julie West, [BPM](#) Tax Practice Group Leader and member of the firm's Board of Directors. “The more I connect with them, the more I see that it's a strength to be different. This year, 50 percent of our potential partner candidates are women. At the partner level, we are also talking about what the criteria of a partner is – specifically related to hours (part vs. full time).”

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Taking cues from women at all levels improves upon traditional lines of communication. In 2020, younger women stepped up into accelerated responsibilities, driven by urgent pandemic demands. Young millennials and Gen Z professionals expect their early leadership success to allow them to advance more quickly, but on their own terms.

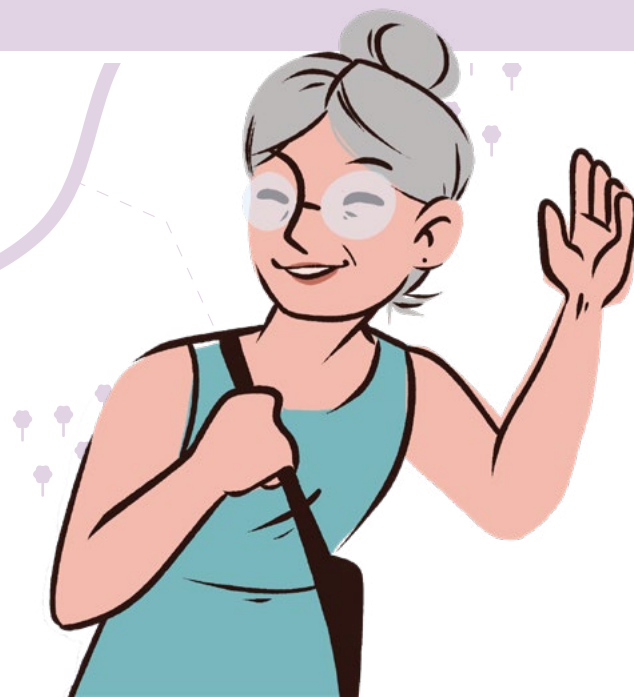
Firms are addressing some of the barriers to retaining women by extending parental leave and pay for both new parents and updating bereavement policies to provide leave for pregnancy loss.

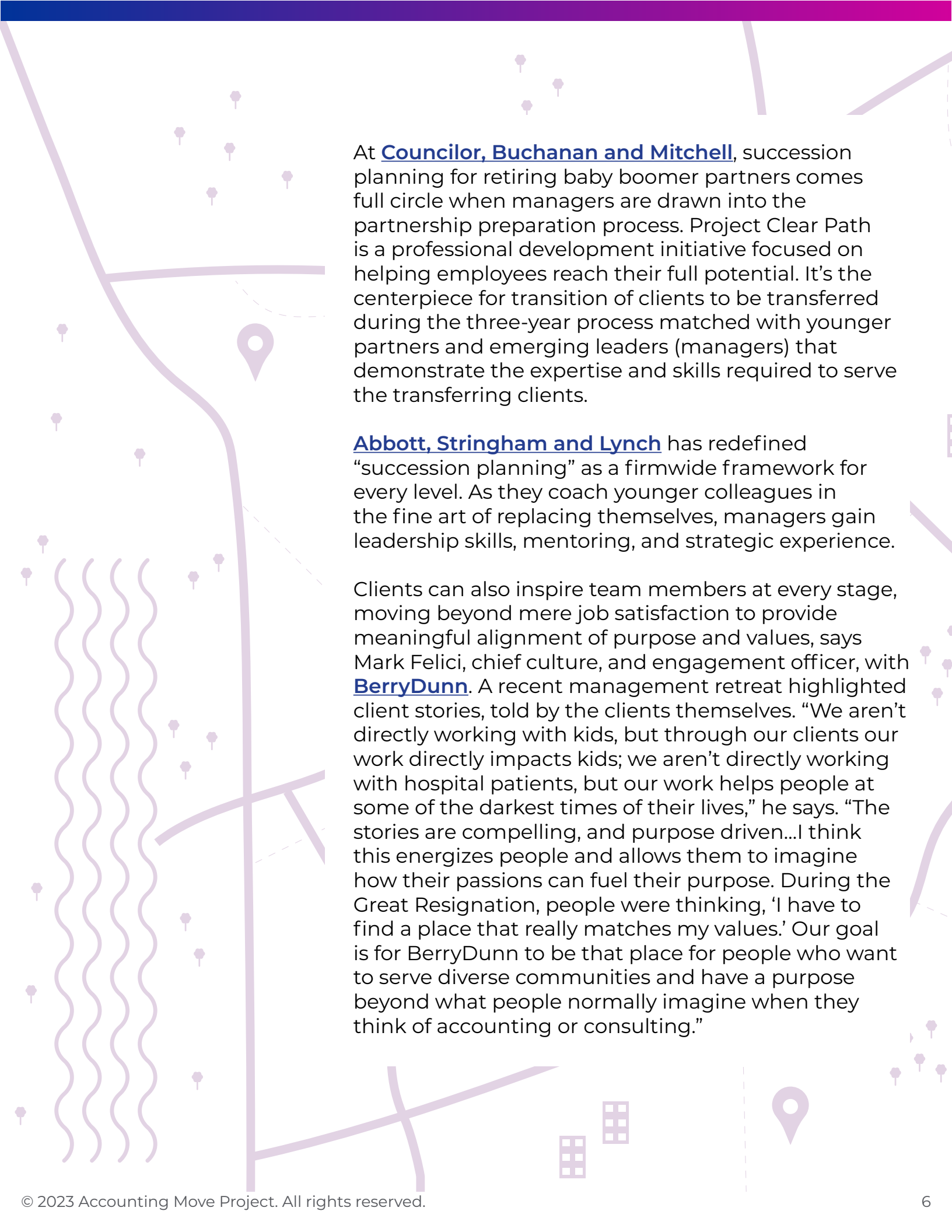
One key: define and celebrate success during the process, not just at the end destination. At [MCM CPAs & Associates](#) (now [Cherry Bekaert](#) August 2023), one new hire signaled her devotion to data analytics as soon as she arrived, relates partner Kim Friend. The firm worked with her to establish a schedule that would both support her participation in building a new analytic solutions service line, while still respecting her holistic commitments. “She made a plan, and we trusted her ability to deliver on that plan,” says Friend.

Here’s how leading firms are threading the needle.

Women want to understand how those a few steps ahead of them have managed specific stretches of their careers, says Tricia Bencich, inclusion and social responsibility associate director, of [Moss Adams](#), the founding sponsor of the Accounting MOVE Project. The firm is reinvigorating its “Getting Real” program for senior associates and early managers. The full-day workshop addresses the concept of future tripping, career development strategies, work life-integration, creating boundaries, and the value of mentoring.

“We also take this opportunity to acquaint them with women partners so they can see how others have made it through and provide them with role models that they can follow. We want them to know how others have done it successfully early on,” says Tricia Bencich, inclusion and social responsibility associate director, of Moss Adams.





At [Councilor, Buchanan and Mitchell](#), succession planning for retiring baby boomer partners comes full circle when managers are drawn into the partnership preparation process. Project Clear Path is a professional development initiative focused on helping employees reach their full potential. It's the centerpiece for transition of clients to be transferred during the three-year process matched with younger partners and emerging leaders (managers) that demonstrate the expertise and skills required to serve the transferring clients.

[Abbott, Stringham and Lynch](#) has redefined "succession planning" as a firmwide framework for every level. As they coach younger colleagues in the fine art of replacing themselves, managers gain leadership skills, mentoring, and strategic experience.

Clients can also inspire team members at every stage, moving beyond mere job satisfaction to provide meaningful alignment of purpose and values, says Mark Felici, chief culture, and engagement officer, with [BerryDunn](#). A recent management retreat highlighted client stories, told by the clients themselves. "We aren't directly working with kids, but through our clients our work directly impacts kids; we aren't directly working with hospital patients, but our work helps people at some of the darkest times of their lives," he says. "The stories are compelling, and purpose driven...I think this energizes people and allows them to imagine how their passions can fuel their purpose. During the Great Resignation, people were thinking, 'I have to find a place that really matches my values.' Our goal is for BerryDunn to be that place for people who want to serve diverse communities and have a purpose beyond what people normally imagine when they think of accounting or consulting."

Pacing

The right work and workload at the right time

Center work around professionals' ambitions and pursue engagements that drive personal and firm growth. This strategy, introduced to the Accounting MOVE Project community by Kaiser Consulting, caused a stir. But in an era of chronic talent shortages, sustainability demands firms synchronize engagements around staff capacity – current and expected. This does more than insulate employees from the endless ping-pong of client inquiries. In fact, for most firms, this reordering proves their stated values.

Rehmann formalized its approach with its Initiative Exploration Plans (IEPs) to identify its markets and segments with the highest growth potential as well as the people best positioned to lead them. As groups are formed, firm leaders approach members of employee resource groups, women's initiatives and other internal groups to create teams that conduct competitive analysis, set goals, perform strengths-weaknesses-opportunities-threats (SWOT) analyses, and much more. The process has done more than identify growth opportunities with current clients and future clients: it has infused early business development experiences with ownership and given young professionals a view of what it's like to run a practice.



The IEP program complements Rehmann's ongoing "journey mapping" process, explains Mike Staniszewski, manager of retention and engagement. "Our goal with launching journey mapping to the firm is to show associates what to expect at each stage. And if they aren't getting what they need or experiencing something outside of what they expect, they are encouraged to have a conversation with firm leadership." The suite of programs has accelerated the rise of women and diverse talent to Rehmann leadership.

HBE sets engagement parameters with each employee, in the context of anticipated onsite and remote plans. Firmly established hours and a focus on productivity have aligned the firm's sustainability goals with client needs. Consistent application and communication are buoying recruiting and retention: HBE has three office locations in Nebraska, and recently expanded their Lincoln headquarters with the construction of a second building.

Another cultural shift at work – dissolving the expectation employees must make a case for downshifting hours, declining administrative tasks, pursuing a lateral move, or reorienting their focus on next steps.

The very process of building sustainability requires organizational pacing. **Jones and Roth** is a case in point. It has released clients that were not good fits and redistributed work, not just according to client need but also to the professional aspirations of team members. "If there's a new destination, you change your map accordingly," says Robin Matthews, partner and shareholder. And Jones and Roth continually finetunes the language it uses to describe career progression and pacing. It's no longer just "flex and fast" but also slow and sustainable.

Progress

Partnership goes both ways

Accountability for stoking sustainability goes in all directions: partners to associates, managers to teams, and practice leaders to clients. “We can’t be amazing at everything, and we don’t want to burn out our high performers with additional work. Everyone is feeling stretched thin,” says Tricia Bencich of [Moss Adams](#). An open discussion of workload and pacing is ongoing at the firm. “This is pushing us to focus on work that will have the most impact and analyze how we move forward,” she says.

“The key to a thriving and diverse profession lies in expanding the menu of options available to all,” says Suzanne Forbes, managing partner with [James Moore](#). “Some individuals are content with a job, while others strive for something more. It’s time to move the dial and create a culture where everyone feels validated and supported in their chosen path. Leadership often stems from a deep calling, making it challenging for some to empathize with employees who don’t share the same passion. We recognize the need to bridge this gap and normalize different career choices. It starts with setting clear expectations, offering meaningful rewards, and fostering a culture of accountability.” One way that’s working out at the firm: ensuring complementary skills are represented on each team – especially when non-credentialed capabilities, such as communication – are essential to the team’s ability to collaborate internally and with clients.

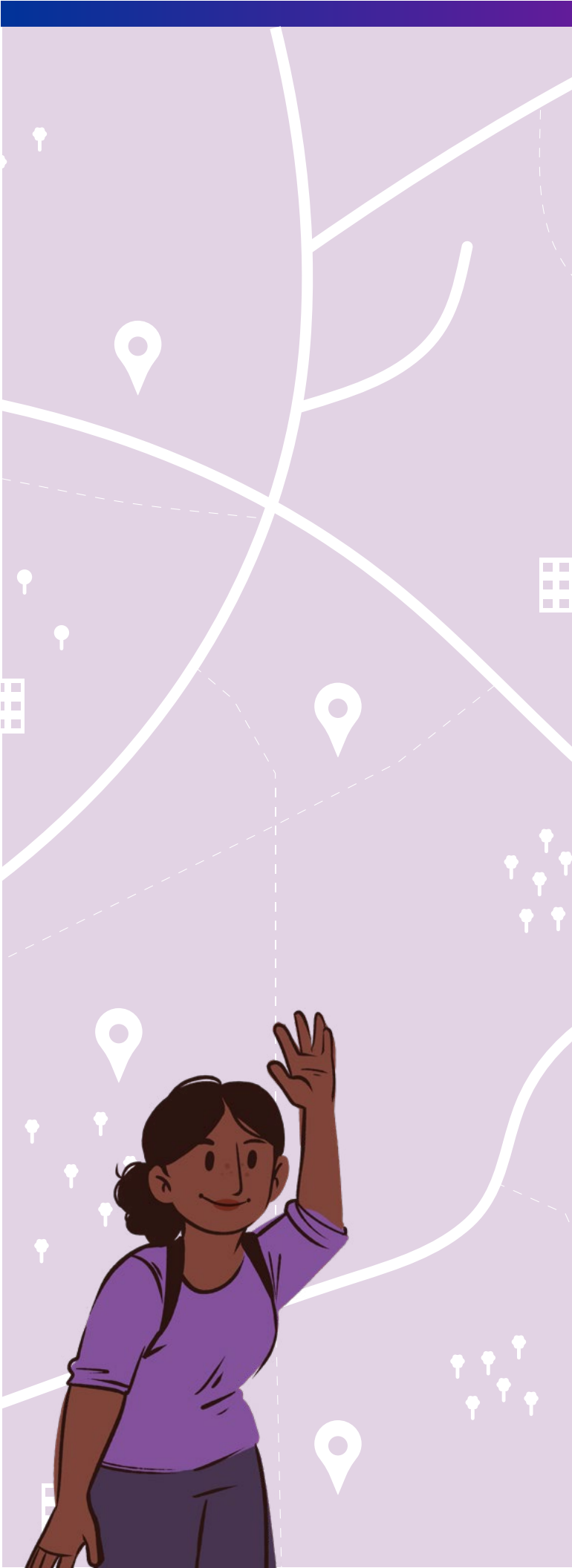
At [Schellman](#), transparency is the essence of sustainability, says Bhavna Dave, chief people and culture officer. “Our culture is proving successful because we are radically transparent about who we are and what matters to us. If you are the type of leader who gatekeeps success or doesn’t want to be transparent with your team, you’re not going to thrive here because we believe transparency is essential to putting people first.”

High-profile women are also changing the conversation. Laura Lin was recently named first female Managing Partner of [Johanson & Yau](#). She emigrated from Taiwan, and her story signals a pinnacle in the firm’s ongoing effort to spotlight the often-overlooked leadership potential among diverse women, says Jon D’Agostino, Director of Human Resources.



“When you come together to build community through candid conversations and inclusive actions, you create opportunities for people to genuinely connect and experience what it means to be Part of Something Greater at CohnReznick – and that connection is where we see the attraction and retention of our people really begin to take shape,” explained Risa Lavine, chief of staff, CohnReznick.





“The explosive growth of our advisory practice is paving a new highway for women’s advancement,” contends Jim Wallace, CEO of [BPM](#). Advisory practices are organically aligned for women’s advancement partly because they are unburdened by change-resistant aspects of accounting culture, and they are not as impacted by the high demands of traditional busy seasons. Five years ago, about 15% of BPM’s revenue was derived from advisory. This year, this proportion is trending towards 35%.

“Whether it’s a chief human resources or chief financial officer for hire or ERP sales, there are a lot of women driving the firm’s growth,” says Wallace. Nearly 40% of its advisory partners are made up of women. And they are illustrating fresh models of flexible scheduling, work-life blend and business development that younger women at the firm learn about through programs such as its Inclusion Now initiatives. “Blooming opportunities in advisory practices merge with more complex expectations of millennial parents, which translates to a complex mix of opportunities and corresponding career supports and paths – a powerful mix,” says Wallace. “It’s more entrepreneurial, with new service lines,” he says of the advisory context for women’s careers. “We’re really optimistic.”

Parts add up to way more than the whole

Scaled partnership tracks not only expand women’s routes to the top, but also signal equitable modes of advancing without apology or accommodation.

A generation ago, **Freed Maxick** leadership faced an opportunity: Michelle Sullivan was starting her family. She was also well on her way to being elected a director (shareholder). She worked collaboratively with firm leadership to propose that they make progress on both tracks – family and firm leadership – by scaling her workload and timeline about 70% and progressing accordingly.

At the time, women comprised less than 10% of Freed Maxick directors. Now, women comprise about 31%, accomplished almost solely by talent strategy resulting in increased retention and internal advancement.

“Just by having that equitable path for talent, our numbers have changed,” relates Sullivan, who, yes, has been a partner for years. “It took a long time, but it needed time. And it had the right attention at the right levels, and strong allies,” she emphasizes.

Traditional accounting career pinnacles are crumbling as underlying business models falter. The very notion of a part-time partnership track is almost the norm.

Accounting MOVE Project data indicates firms are adopting alternative partnership tracks that allow candidates to stay the course while on a reduced work schedule. In 2018, the first year the MOVE Project collected such data, 34% of firms reported they offered part-time partnership tracks. By 2021, 38% of firms offered that option. This year the percentage dropped to 34% due to a number of new participants.

But even with this shift downward, based on our conversations, the number of firms looking into how to incorporate a customized partnership model seems to be rising.



| Accounting MOVE Project Data | 2023 | 2022 | 2021 | 2020 | 2019 | 2018 |
|--|------|------|------|------|------|------|
| Percentage of firms with part-time partnership track | 34% | 46% | 38% | 38% | 36% | 34% |

Aimee Jozic's journey at [The Bonadio Group](#) is similar to Sullivan's, and provides a case study on the benefits of a customized partnership model for advancing women in equity partnership. While a new mother, Jozic took a part-time workload with a flexible schedule. Bonadio collaborated with her to tailor her level of commitment, workload, and ownership in the firm at each step in her advancement.

“Bonadio was very intentional about creating a flexible environment for women to succeed in their professional and personal lives,” explains Jozic. “Our part-time partnership model has been a natural progression of DEI in the firm, and especially effective at retaining women.”



The Bonadio model is not a mystery; it is available to anyone who wants to pursue it. The process ensures all areas are adjusted proportionally to reflect their reduced hours. In Jozic's case, the firm's flexibility and willingness to scale her track in the way that made the most sense – and adjust proportionally along the way – delivered Jozic to the ranks of partner and made good on the firm's promise to her.

Part-time partnership tracks must be engineered with multidimensional flexibility so both firms and aspiring partners can smoothly and quickly change direction and career acceleration, says Beth Kieffer Leonard, partner in charge of the advisory group with [EisnerAmper](#) and former managing partner of Lurie LLP, which merged with EisnerAmper in 2022. “It's going to be a matching of firm needs and the person's needs, and it's not always in sync,” she adds.

As firms increasingly integrate advisory functions into their operations and career paths, they will be forced to recognize and reward experience and credentials that are not licensed, expanding on the strict standards demanded by the CPA career path. Doing so creates new modes of business and practice development, she says, and firms will have to meet new partner qualifications with new forms of compensation and equity ownership. “The incentives will have to change.”

Scaled partnership works at both ends of the leadership pipeline, she points out. The much-dreaded tsunami of retiring CPAs is cresting. [Widely reported AICPA data](#) found that in 2020, 75% of CPAs had reached retirement age. Scaled partnership tracks provide a structured transition for the most tenured partners to continue to earn, contribute to the firm – especially on projects and during busy seasons – and manage their own financial shift to retirement, adds Leonard.

That every path to partnership must pivot on meticulous documentation of women's contributions underscores efforts by firms crafting new routes to pinnacle positions.

For instance, at the inception of the Accounting MOVE Project in 2010, firms overwhelmingly counted only the acquisition of new clients as partner-qualifying business development. Gradually, firms using tools like Salesforce such as [Rehmann](#) and [BeachFleishman](#) have structured ways to count client retention and contributions to new client acquisition as wins for potential partners.

[As outlined in prior Accounting MOVE Project reports](#), mid career women often take the approach of cultivating and retaining longstanding clients –



including cross-selling – as a specific business development skill. Retaining clients is, of course, more lucrative and sustainable than endlessly chasing new clients with little focus

on building long standing relationships. Dashboards attribute incremental contributions to new client acquisition document and quantify the previously taken-for-granted support roles in winning new clients.

Ultimately, there is no “true way” to structure a scaled partnership model, but documenting how it works and communicating those details to the firm is key. For example, [Eide Bailly](#) has had a program for many years now that allows partners to step back to focus on personal responsibilities, when needed. Partners who take advantage of this option are encouraged to share their stories with staff, so staff are aware that there is no one size fits all approach to becoming a partner.

This communication demonstrates the firm’s willingness to do what is needed to support team members at all levels, is a retention strategy and shows numerous paths to partnership.

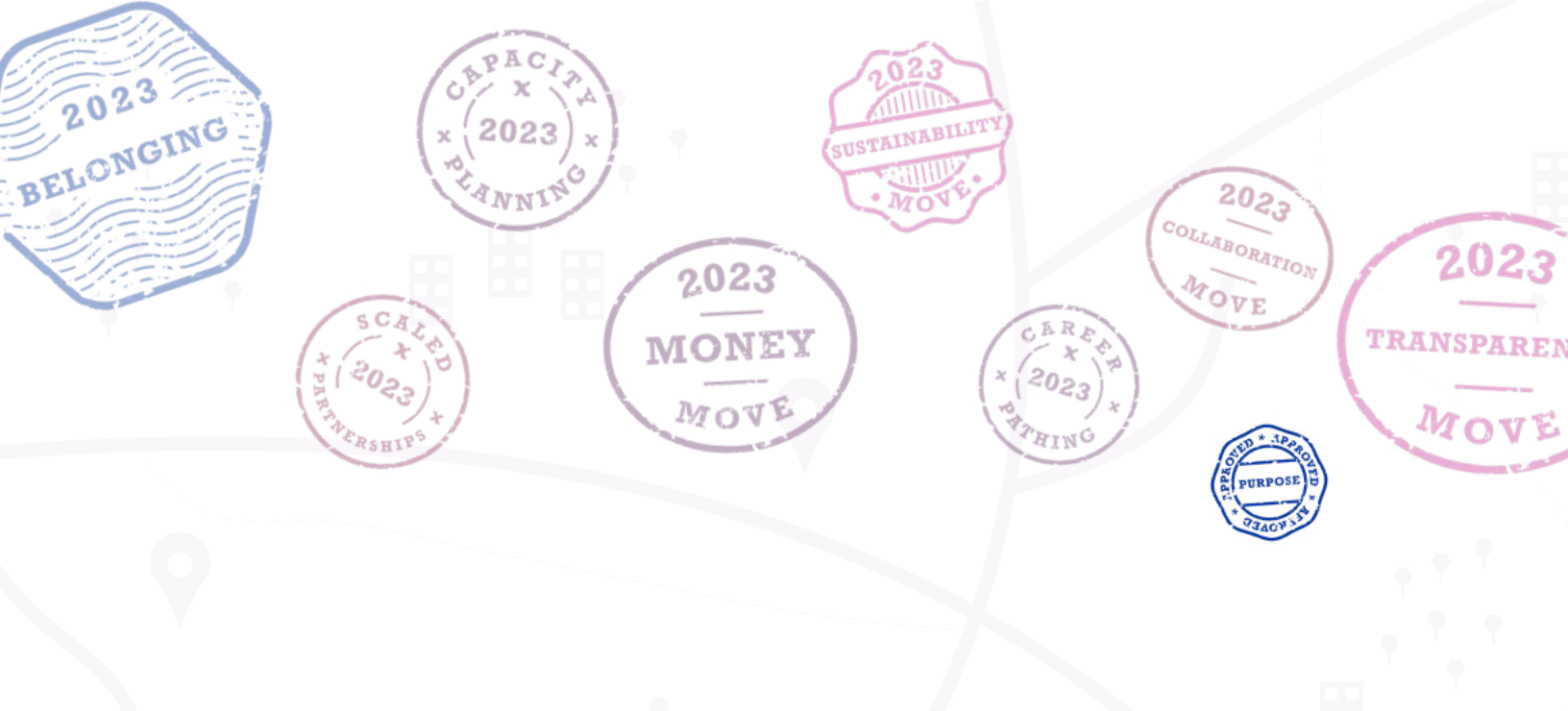
At [Freed Maxick](#), senior leadership understood a longer vision to integrate part-time directors into equity ownership. Typically, explains Sullivan, new directors at the firm don’t

automatically have access to equity. For all, an offer of equity is grounded in performance and typically comes with corresponding financing modes for the buy-in, explains Sullivan.

That structure ensures that women who are also earning at a scaled level are not consequently locked out of equity ownership because lower earnings prevented them from access to take an equity stake, thus avoiding a punishing pay gap at what was supposed to be a career peak.

As Sullivan’s children grew, so did her ambitions for easing into full-time partnership. A tempting professional opportunity proved to be the tipping point, and was in harmony with her personal responsibilities. She took it, shifting smoothly into full-time status in the process.

That was ten years ago. Now, she is a director and a member of the firm’s executive committee. She coaches a steady stream of younger women in the Freed Maxick method of blending autonomy and ambition. “Some firms get caught up in the metrics of how someone can be a shareholder if they’re not working full time,” says Sullivan. “The answer is, do they have the competencies to be a director? Are their contributions to the organization meaningful? It’s more important to retain that talent than to worry about the talent’s schedule.”



2023 Accounting MOVE Project Qualitative Highlights



MONEY

Firms are increasingly advocating for – and implementing – fair pay policies.



76%

OF FIRMS OFFER COMMUNICATION TOOLS TO SUPPORT INDIVIDUAL PAY DISCUSSIONS.

32%

OF FIRMS ANALYZE PAY BY RACE AND GENDER, DOWN FROM A HIGH OF 41% IN 2020.

4%

OF FIRMS TIE EQUITABLE PAY DECISIONS TO MANAGERS' BASE PAY OR BONUSES.

Accounting MOVE Project firms are adopting new ways to provide managers with context for compensation decisions thus allowing for quicker detection and correction of emerging inequities. This keeps inequities from drifting into gaps, while normalizing pay equity in workplace accountability. The more firms embrace fair pay policies as core to their compensation structures, the closer policies come to ensuring accountability in managers' pay and bonuses.

Among the promising practices:

[Armanino](#) has undertaken a year long job harmonization project that entailed developing job descriptions for all roles across the firm. The job descriptions were then used to price every job firmwide and develop multi-factor pay bands. These efforts are all a part of their focus on pay equity.

[BerryDunn](#) includes DEI counsel – internal and, as needed, external – in compensation reviews to isolate inadvertent discrimination. This process notes and eliminates other rationale for pay differences, leaving only the unexplained. It is a learning experience in itself, driving home the relevance of a DEI mindset, say firm leaders.

When evaluating compensation, [Schellman](#) looks at the entire group rather than just those up for promotion. This data is then analyzed by performance and reviews of comparable individuals in similar roles. Additionally, we monitor DEI metrics, such as race, age and ethnicity, to ensure performance rewards are equitable. Any disparity identified is fixed. “Our aim is to approach promotions, merit increases, and bonuses with transparency and equity,” explains Bhavna Dave, chief people and culture officer at Schellman.

OPPORTUNITY

Leadership experiences allow employees to road-test ambitions as well as gain insight for subsequent career moves.

The greatest increase in support was seen in Hispanic (48% from 29%) and LGBTQ (40% from 29%) groups.

84%

OF FIRMS MENTOR ACROSS DEPARTMENTS AND FUNCTIONS, AND 80% OF FIRMS OFFER TECHNICAL SKILLS TRAINING FOR NONTECHNICAL EMPLOYEES.

80%

OF FIRMS SYSTEMATICALLY IDENTIFY HIGH-POTENTIAL EMPLOYEES, AND 56% TRAIN THEIR MANAGERS ON HOW TO IDENTIFY THESE INDIVIDUALS.

64%

OF FIRMS SPONSOR AFFINITY NETWORKS OR BUSINESS RESOURCE GROUPS. OFFERINGS INCREASED IN EVERY CATEGORY EXCEPT FOR WOMEN, WHICH DROPPED FROM 83% IN 2022 TO 72% IN 2023.

This is the highest reported in MOVE's history.

This year, as hybrid work solidified into the norm, Accounting MOVE Project firms concentrated on re-establishing collegiality and community among current and potential leaders. As documented in the last two MOVE Project reports, women associates and seniors have stepped up and asked for more responsibility and opportunity, and in doing so have proven they are up to the tasks.

[Eide Bailly](#) has expanded its internal coaching staff to four professionals and extended its scope to include women who are at earlier stages of their career. Coaching happens within the structure of small group cohorts, which create supportive and collaborative communities for women to connect, grow, and thrive; in addition to, the community created through their Women Empowered ERG.

Skills do not equate to career satisfaction or sustainability. Consequently, some firms are incorporating relationship and self-understanding tools into career training. [Frazier & Deeter](#) has adopted an approach that treats teams as a whole and encourages members to draw on one another's off-balance-sheet strengths, says DEI program manager Kandace Freeman.



“We no longer focus primarily on technical expertise. Instead, we ensure our teams are balanced and comprised of individuals who are analytical, organized, and emotionally intelligent. We realize emotions aren't a weakness but a strength that can be tapped for better performance,” Freeman shares. Proof of concept is in higher client satisfaction and happy surprises when typically reticent team members rise to stressful occasions.

[RoseRyan](#) is focused on building bench strength by providing innovative development experiences. These include pulling managers into the spotlight in biweekly missives to clients and passing them the torch of strategic leadership. This intentionality benefits the firm in a few ways, points out firm president Dave Roberson. It requires managers to put their confidence to the test as they present case studies and insights relevant to clients. It also introduces clients to rising talent in advance of engagements and puts firm initiatives in the hands of those who are hungry to lead. “Our managers are learning they can have a voice, and firm leadership is learning the value of delegation,” says Roberson.

Reflecting young employees’ early concern about work-life balance and focus on mental health, [Councilor, Buchanan & Mitchell](#) integrates skills training with mindfulness and meditation exercises and wellness webinars.

MCM CPAs & Associates (now Cherry Bekaert) has turned the traditional talent review process inside out. These days, managers and teammates review individuals’ contributions in the context of firm and team accomplishments. The team perspective is especially valuable for the newest generation of professionals – many of whom were robbed of group developmental benefits during pandemic-restricted college and early-career years.

While the profession wrings its hands about the talent drought, some firms are seeding future employees among local high school students. [HBE](#) pulls in local high school and local college students to help with the tax season crunch, giving students an adrenaline-infused taste of the profession.

Likewise, [Bland and Associates](#) is partnering with a local high school to help develop their accounting curriculum as part of its business track and partnering with UNO (University of Nebraska at Omaha) as part of their Accounting Adventures Camp.

Perennial MOVE front runner [Clark Nuber](#) believes empowering its workforce is vital to the firm’s success.

“By investing in – and prioritizing the development of – our workforce, we have built a strong bench of potential partners,” explains Tom Sulewski, president and CEO of Clark Nuber. “Even before the pandemic, we recognized the value of investing in people. When no one else was hiring, we were. This foresight allowed us to retain highly skilled people so, coming out of the pandemic, we were ahead of the curve.”

VITAL SUPPORTS

Supporting the whole person, and every person, is the key to a culture of belonging.

92%

OF FIRMS HAVE FORMALLY CODIFIED FLEXWORK, AND 68% TRAIN MANAGERS ON HOW TO MANAGE REMOTE TEAMS.

52%

OF FIRMS NOW OFFER SABBATICALS.

76%

OF FIRMS OFFER A PHASED RETIREMENT OPTION TO PARTNERS AND EMPLOYEES.

Energy and enthusiasm are vital to career sustainability, but hard to engineer and notoriously tricky to measure. This year, MOVE Project firms designed imaginative ways to stoke staff motivation so they ‘keep on keeping on.’

- Families of MCM staffers were taken aback when they learned of the firm’s new travel award for loyalty and service, which recognizes family investment in staff careers.
- Schellman also boosts PTO after only two years on the job, and provides a \$1,000 stipend at the five-year mark.

Several MOVE Project firms expanded new parent leave and accommodations. For instance, maternity and paternity leave at [Grassi](#) is now as much as 20 weeks, with a minimum of 13 weeks. New parents are able to consult peers through an internal network that helps them apply benefits and return-to-work transition programs to parenthood. [Johanson & Yau](#), realizing opportunities to ensure greater equity in their paid family leave program, made the decision to right size their policies. Now, employees may return from leave with a full-time salary, while resuming work on a temporary part-time schedule following the birth of a child, illness, disability or other covered personal situations.



After reviewing its policies and benefits, [Kerkering, Barberio and Co.](#) made substantial and generous changes to maternity leave benefits that impact both parents. The firm also updated its bereavement policy to include leave for those who experience loss of pregnancy.

[BeachFleischman](#) trimmed some charge hour goals to free up time and attention for staff development activities that fall outside traditional training, reports their human resources manager Molly Willinger. The firm tracks the time spent by Associates (after their first year) through Managers on developmental activities and even allocates additional bonuses for those who participate in these activities.

Integrating mental and social health with training and internal events signals a deeper

shift at [CohnReznick](#) and [Abbott, Stringham and Lynch \(ASL\)](#), as well as other leading firms. ASL puts training and wellness on an equal plane, retooling its training programs as holistic experiences that foster overall personal development.

[Schellman](#) amplifies the personal journeys of its leaders to illustrate that advancement includes both common experiences and unique breakthroughs.

New MOVE firm [Aprio](#) has embraced workplace flexibility while recognizing there is no one right way to approach work-life integration. Rather than institute strict core business hours, employees are encouraged to block out “focus time” on their calendars so they can concentrate without interruptions. “People respect ‘focus time’ and do all they can to work around it. The people I manage don’t have to be available during core hours as long as they get their work done. We trust our people will complete their work, and it shows we respect and support work-life balance,” shares Jan Whalen, HR director, Aprio.

As MOVE firms are taking cues from younger staff who respond seriously when invited to bring “your whole self” to work, they must recognize when a particular group needs additional support. [CohnReznick](#) showed remarkable commitment to supporting women affected by recent federal legislation and revamped their benefits program to



be more inclusive, reinforcing the idea that being seen is critical to employee engagement and retention. From CohnReznick Chief of Staff Risa Lavine’s viewpoint, the firm has been intentional about incorporating inclusive and progressive policies to its people. While there are still instances where it underreacted and overreacted during this time of continuous growth and learning, “the collective desire is to foster belonging through listening, understanding, creating proximity, and appreciating others lived experiences – with respect,” Lavine adds.

Often what seem like small adjustments can have incredible impact. For example, [Frazier & Deeter](#) repositioned the tone of its employee handbook from punitive to inclusive, creating a sense of belonging for all staff members.

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“We wanted to make sure the first physical document a new employee sees at Frazier & Deeter is positive, empowering, and representative of our culture,” explains Kandace Freeman, DEI program manager.

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And, finally, many MOVE firms expanded their holiday calendars with Juneteenth. Adding this paid holiday is a tangible way to recognize its importance in our history and, in essence, prove that diversity and inclusion is more than simply talk.

ENTREPRENEURSHIP

Providing the tools and training for women to become business developers early pays off for both the firm and the individual.



84%

OF MOVE FIRMS ARE STOKING ENTREPRENEURSHIP WITH INTERNAL INCUBATORS FOR EMPLOYEE IDEAS.

76%

OF FIRMS SAY ERGS HAVE OPENED DOORS TO NEW BUSINESS OPPORTUNITIES, AND 48% NOW SAY THESE PROGRAMS SHAPE GO-TO-MARKET STRATEGIES FOR NEW PRACTICES AND LINES OF BUSINESS.

44%

OF FIRMS INVEST IN THEIR COMMUNITIES BY PROVIDING OR SUPPORTING EDUCATIONAL OPPORTUNITIES FOR WOMEN AND MINORITY-OWNED BUSINESSES.

An all-time high for both.

Fostering women's entrepreneurship is becoming a standard for top-ranking MOVE Project firms. Those like [MCM](#) and [BeachFleischman](#) have built commanding regional reputations as champions of women business owners. [Frazier & Deeter](#) has just raised the bar by partnering with local business incubator Russell Innovation Center for Entrepreneurs (RICE) to support Black entrepreneurs and small business owners. The firm's partnership includes pro bono tax consulting and investment into a multi-use space for RICE members to gather, learn, and collaborate.

Younger women, steeped in the entrepreneurial cultures of the gig and self-employment economy, expect firms to apply external advocacy to their own careers. Add in the now-universal appeal of lateral career paths, and firms have come to realize that it's best to work with employee's identifications as the CEOs of their lives. "We really believe passion and curiosity are critical to performance and engagement," says [Schellman](#)'s chief people and culture officer Bhavna Dave. It was this vote of confidence that encouraged Kristin Wilbur to act on her passion, leading to the formation of Schellman Cares, the overarching committee that houses the firm's ERGs, Day of Giving, and other human-centric initiatives.

This strategy is paying off for [Johanson & Yau](#), where the default response to impending life events now focuses on subsequent career moves and less on leave policy mechanics, says human resources leader Jon D'Agostino, SHRM-CP, PHR. For example, success retaining new parents has stoked the firm's commitment to building scaled advancement pathways.

Starting with the destination in mind and working backwards to chart the course has proven a resilient strategy for [Rehmann](#), says chief human resources officer Scott Bonacorsi. “We encourage employees to do what they need to do to achieve work-life integration, looking at the end result rather than how they got there,” he states. “Over the last three years, our primary focus has been on taking a whole person approach. At the same time, women have left the workforce in droves, so we look at systemic causes resulting in women leaving the workforce to institute strategies, processes and programs that positively impact careers for women.”

[Moss Adams](#) is bringing back Getting Real, its day-long, interactive workshop for seniors. The goal is to help these young women understand what their career can look like and how to navigate each stage as they move into leadership roles. “We cover things like personal branding, networking, career sustainability, setting boundaries, and mentoring in a direct and honest way,” describes Tricia Bencich, inclusion & social responsibility associate director of Moss Adams. This also allows seniors and early managers to meet and get to know some of the women partners in the firm so they can have deeper conversations later. “We want our women to know how others have successfully made it to partner early on.”



About the Accounting MOVE Project

The Accounting MOVE Project is based on the MOVE methodology, developed by research partner Wilson-Taylor Associates, Inc., which investigates the factors proven to be essential to women's career success:

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| M | Money: fair pay practices |
| O | Opportunity: advancement and leadership development |
| V | Vital supports: work-life programs that remove barriers |
| E | Entrepreneurship: operating experience for managing or business ownership |

Methodology

Since 2010, the Accounting MOVE Project has measured and supported the advancement of women at accounting and consulting firms. MOVE is the only annual benchmarking project that both counts and advocates for women in the profession.

The MOVE Project advisory board includes leaders from association partner the Accounting and Financial Women's Alliance, founding sponsor Moss Adams and supporting sponsor, SAPRO.

MOVE is made possible by support from its sponsors and by administrative fees paid by participating firms. Firms receive benchmarking reports based on the MOVE Project.

The Accounting MOVE Project is the basis for two recognitions of excellence for women in the accounting and advisory profession, both awarded by the AFWA:

- **Best CPA Firms for Women:** To earn a spot on the list, an employer must have both a proportionate number of women at most or all levels of management and proven success with the MOVE factors. An employer cannot win by having a rich array of programs but few women in leadership. We believe that if a firm's MOVE factors are effective, it will have a healthy and growing proportion of women in its leadership pipeline.
- **Best CPA Firms for Equity Leadership:** This list recognizes firms with at least 31% women partners and principals, as roughly a third is the widely recognized "tipping point" or members of any identity group to have individual impact. The Equity Leadership list recognizes firms that have achieved that milestone through any combination of culture, programs, initiatives, and growth.

About the Accounting MOVE Project Partners



At **Moss Adams**, we believe in the power of possible. A business and personal advisory firm with more than 100 years of experience and 4,400 professionals across 30 markets, we work with clients to meet the rising challenges and opportunities of tomorrow. Discover how we can help you go where you want to be next. Upward. Visit www.mossadams.com.



The Accounting & Financial Women's Alliance promotes the professional growth of women in accounting and finance. Members of the association benefit from opportunities to connect with colleagues, advance their careers, and become industry leaders. For over 85 years, the organization has proudly upheld its mission to enable women in all accounting and related fields to achieve their full potential and to contribute to their profession. Visit www.afwa.org for more information.



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