

**PROFESSIONAL PLAN CLIENT ONBOARD DOCUMENT**

**Instructions**: In RFEs, the USCIS will often request “a model or plan for future activities”. RFEs frequently focus on a common set of criteria following the matter of Dhanasar (2016) when assessing National Interest Waiver (NIW) elements included within a petition. ProfVal’s professional plans are based on a study of RFEs, successful petitions, and cases we have seen over a period of years. This document thus coaches you in areas that may help to support a NIW argument.

As a professional plan provides **you** with an opportunity to share *your narrative* with a USCIS agent, it requires considerable input from you. When you provide higher quality inputs, it helps our team to craft a more compelling narrative. Based on the inputs you provide, our team will help you to produce a professional plan that aligns to the core categories of the EB-2 NIW.

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| **Name & Order Information** |
| **Order number:** |  | **Date of order:** |  |
| **First Name** |  | **Last Name** |  |

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| **What will you be doing?** |

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| **When the USCIS evaluates your endeavor, it may be based on the OOH code most closely aligned to your endeavor. Please share the occupation and, if you have it, the role as it relates to the** [**Occupational Outlook Handbook**](https://www.bls.gov/ooh/a-z-index.htm)**:** Common roles: [Advertising, Promotions, and Marketing Managers](https://www.bls.gov/ooh/management/advertising-promotions-and-marketing-managers.htm), [Civil Engineers](https://www.bls.gov/ooh/architecture-and-engineering/civil-engineers.htm), [Top Executives](https://www.bls.gov/ooh/management/top-executives.htm), [Financial Managers](https://www.bls.gov/ooh/management/financial-managers.htm) |
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| **Please briefly describe the industry that is most relevant to your endeavor.** *(IT industry, Finance, Clean Energy, etc.)* |
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| **Please provide a detailed description of your endeavor that explains in simple terms the following information:** |
| ***Imagine that you must quickly explain your endeavor to a 5th grader. In 1-2 paragraphs, explain what you will do.*** |
| ***Who will your clients be?*** *(consumers, businesses, government)* |
| ***What problem(s) are you solving for them?*** |
| ***What problems will your endeavor solve for the United States?*** |

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| **Exceptional Ability Criteria** |
| **First, are there certain professional achievements that you would like highlighted as it relates to your capacity to succeed in the endeavor.** Why are these achievements significant?  |
| **Select if qualified** | **Criteria & Explanation** |
|[ ]  **Degree, diploma, certificate, or similar award from a college, university, school, or other institution of learning relating to your area of exceptional ability.*****List the degree(s) that you earned that are relevant to your endeavor.***Example: I earned a {degree earned: bachelors, masters, doctoral degree} in {discipline: business administration, computer science, etc.} from {insert the name of the college or university}, an institution of higher education in {insert country name}. During my studies, I completed courses that are relevant to my endeavor such as the following: \_\_\_, \_\_\_, \_\_\_, \_\_\_, \_\_\_, and \_\_\_. |
|[ ]  **At least 10 years of full-time experience in your occupation.*****Describe each major role and some of your accomplishments:***Example: In {insert year}, I became the {insert title} with {insert company}, a role that I held for approximately {# of years in role} (insert beginning month and year and end month and year). As the {insert title}, I was in charge of a variety of activities related to my endeavor of {brief description of endeavor}. Some of these responsibilities included.* Responsibility 1
* Responsibility 2
* Responsibility 3
* Etc.

As a result of my leadership in this role, a variety of positive outcomes emerged that benefitted {insert company} and {insert other entities that benefitted: society, customers, others}. Some of these benefits included:* Benefit 1
* Benefit 2
* Benefit 3
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|[ ]  **license to practice your profession or certification for your profession or occupation*****Describe the licenses or certifications that you have and why they are important.***Example: In the area of {insert discipline or activity}, it is required to have a license in {insert area} to practice. This license is important within the field because it {explain importance: safety, financial security, link to industry standards, etc.}. Consistent with this requirement, I hold the license of {license area}. This license was issued by {issuing body} and is recognized by {recognizing bodies, countries, institutions, professional organization, etc.} |
|[ ]  **High salary*****List your salary for multiple years***Example: Across the following years, I have earned wages that are above the standard in my industry. These include the following:* *2020 total wages: $XXX,XXX*
* If this total represents multiple sources, indicate the source of this income (i.e. dividends, salary, commissions, sale of a company, etc.) and indicate the documents that the USCIS agent will need to look to in order to verify this content.
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|[ ]  **Membership in a professional association(s)*****List the organizations that you are a member of***Example: Within the domain of {insert field that you work in}, it is important to maintain memberships within certain organizations, as these organizations provide {insert benefits: networking, demonstration of credentials, recognition within the field}. I am a member of organizations including:* Organization 1 (website): Description of organization
* Organization 2 (website): Description of organization
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|[ ]  **Recognition for your achievements and significant contributions to your industry or field by your peers, government entities, professional or business organizations*****List persons or entities that have recognized you, which may include people you worked with:***Example: I have been recognized by a number of highly regarded persons within my field. These include:* Person 1 (Title, Organization): Ms. XX is respected based on {degree, years of experience, describe importance of role}. As she says in her support letter for me, I have added value through {insert key successes}.
* Person 2 (Title, Organization): Mr. XX is respected based on {degree, years of experience, describe importance of role}. He has noted that I have {insert key successes}
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|[ ]  **Other comparable evidence of eligibility is also acceptable.*****Commonly, we see clients use EB-1 or other criteria. Below, you will find the listed EB-1 criteria. If you meet any of these criteria, please explain how:***\* Criteria for Demonstrating Extraordinary Ability* Evidence of receipt of lesser nationally or internationally recognized prizes or awards for excellence
* Evidence of your membership in associations in the field which demand outstanding achievement of their members
* Evidence of published material about you in professional or major trade publications or other major media
* Evidence that you have been asked to judge the work of others, either individually or on a panel
* Evidence of your original scientific, scholarly, artistic, athletic, or business-related contributions of major significance to the field
* Evidence of your authorship of scholarly articles in professional or major trade publications or other major media
* Evidence that your work has been displayed at artistic exhibitions or showcases
* Evidence of your performance of a leading or critical role in distinguished organizations
* Evidence that you command a high salary or other significantly high remuneration in relation to others in the field
* Evidence of your commercial successes in the performing arts

\*\* Examples of Documentary Evidence That A Person is an Outstanding Professor Or Researcher* Evidence of receipt of major prizes or awards for outstanding achievement
* Evidence of membership in associations that require their members to demonstrate outstanding achievement
* Evidence of published material in professional publications written by others about the alien's work in the academic field
* Evidence of participation, either on a panel or individually, as a judge of the work of others in the same or allied academic field
* Evidence of original scientific or scholarly research contributions in the field
* Evidence of authorship of scholarly books or articles (in scholarly journals with international circulation) in the field
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| **National Interest Waiver (NIW) arguments** |
| As you might imagine, the NIW element of the EB-2 NIW is often the most challenging part of an application. Based on areas that commonly arise within RFEs, the questions below help to identify areas that would contribute to the national importance of your endeavor. |
| **Progress made in the endeavor. What have you done so far to show that you are able to succeed in this endeavor?** **Ways to prove this include:*** *Have others (especially persons in the US) expressed an interest in working with you?*
* *Have companies requested your services?*
* *Have you succeeded in a similar endeavor in the past?*
* *Have you received grants for similar work?*
* *Have you played a leading or*
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| **Do you need *financial support* for your endeavor? If so, please explain how you plan to secure financing. If not, please briefly explain why (1-2 sentences).** |
| **What do you think are the national benefits of your work?** Please indicate all ways below that may relate to your endeavor:* Creation of jobs for U.S. workers.
* Increased taxable revenues.
* Has national or global implications within your field.
* Improvements to societal welfare (i.e. medical health, culture, public safety, national security, quality of life, environmental quality, mental health, artistic enrichment)
* Impacts an area that the U.S. government has indicated is of significant importance.
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| **If you would like to share media articles or information about your industry that you believe is especially relevant, please include the links here**:  |
| **NOT REQUIRED:****Small businesses can use various approaches toward making a difference in the U.S. and world through social responsibility programs (**[**learn about ways small businesses can incorporate social responsibility into their business models**](https://www.profval.com/post/social-responsibility-how-your-small-business-can-make-a-big-difference) **and see ProfVal’s approach**). Some clients have supplemented their arguments for national interest based on their social responsibility initiatives. If you have a social responsibility program, please describe it here:Example: My company {insert company name} has also [made a commitment through Pledge 1%](https://pledge1percent.org/pledged/) to donate part of our {choose one or more: equity, time, product, profit} toward giving back to U.S. communities in ways aligned to my proposed endeavor. Specifically, my company has pledged to give {what will you give back to the community} to {who is it benefitting?}. In addition to the core benefits of my endeavor, this program will lead to benefits for U.S. citizens by helping {who it is benefitting} to {how are they benefitting?}. |