

CPCS SMART Goal Bank

*Note that these are **example goals** written in the SMART goal format (Specific, Measurable, Actionable, Relevant, Time-bound). They are meant to provide inspiration and potential directions to go in forming your development goals for the year. **Please adapt to your specific needs!***

Second Note: **This bank is not meant to be a comprehensive list of potential goals. However, if there are glaring omissions that you would like to see filled, please email hr@publiccounsel.net with your suggestions.**

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I. Administrative Roles

 **Guide for Goal Types and Their Meanings (for use in performance review):**

Category	Definition	Typical Focus	Examples
Defined Work Priorities	“What work gets done.” Goals tied to essential job functions and measurable service outputs that support division or office operations.	Workflow, communication, responsiveness, accuracy, and service delivery.	Reducing case entry delays, improving data quality, creating standardized forms, timeliness in correspondence.
Professional Development, Wellness, and Personal Care	“How the employee grows and sustains performance.” Goals centered on growth, learning, resilience, and wellbeing.	Skill building, career development, work-life balance, teamwork, and wellness.	Training attendance, process documentation, feedback-seeking, time management, participation in CPCS wellness activities.

Goal Type 1: Defined Work Priorities (What Work Gets Done)

1. Client and Case Support

- 29. Respond to all incoming court or client inquiries within **XX business day(s)** to ensure timely client assignment or information routing.
- 30. Maintain **100% on-time data entry of case assignments** into system logs by the end of each week.
- 31. Ensure **all client intake calls** are logged accurately in the call log within **XX hours of receipt**.
- 32. Prepare and send **Notices of Assignment of Counsel** within **XX business day(s)** of confirmed attorney acceptance.
- 33. By XX date, reduce **returned or incomplete assignment forms** by **XX%** through clearer process tracking and communication with attorneys.

2. Administrative Coordination and Documentation

- 32. Maintain organized, electronic filing systems for case materials and correspondence, ensuring **zero overdue or missing files** during quarterly audits.

- 33. Develop and document a **shared office reference guide** for recurring administrative processes (mailing lists, billing procedures, calendaring) by XX date.
- 34. Complete all **calendar updates and scheduling requests** within XX hours of submission to minimize scheduling conflicts.
- 35. Maintain an accurate inventory of supplies and equipment, performing a **quarterly review** to identify needs or cost-saving opportunities.
- 36. Audit and update **contact lists and distribution groups** quarterly to ensure current and accurate communication.

3. Communication and Team Support

- 34. Respond to emails and phone messages within **XX business day(s)**, achieving a XX% responsiveness rate over the fiscal year.
- 35. Facilitate **monthly check-ins with administrative peers** across offices to identify opportunities for process consistency and collaboration.
- 36. Create or improve **standard templates** (letters, forms, meeting notes) for office-wide use by XX date to streamline workflow.

4. Data, Reporting, and Technology

- 36. Generate and submit **monthly statistical reports** accurately and on time.
- 37. By XX date, identify and implement **at least one automation or efficiency improvement** (e.g., Excel tracker, form fill, SharePoint list) that reduces repetitive manual work.
- 38. Conduct quarterly **data quality checks** for attorney assignment, case status, or billing spreadsheets, ensuring data accuracy above 98%.
- 39. Support the rollout of **division-wide administrative projects** by tracking progress and providing biweekly updates to supervisors.

Goal Type 2: Professional Development, Wellness, and Personal Care (How You Grow and Sustain Performance)

1. Professional Development and Skill Growth

- I. Attend at least **XX CPCS or external administrative training sessions** (e.g., Excel, Teams, communication skills) by XX date.
- II. Identify one **new technical skill** (e.g., Excel pivot tables, data visualization, mail merge automation) and demonstrate its use in a project by XX date.
- III. Complete one **cross-division shadowing or mentorship experience** by XX date to understand other administrative workflows.

- IV. Lead or co-lead one **office improvement project or process documentation effort** by year-end.

2. Communication and Collaboration Skills

1. Request **constructive feedback quarterly** from at least one supervisor or peer on communication effectiveness and collaboration.
2. Practice **meeting facilitation or agenda-setting** in at least one recurring meeting by XX date to strengthen leadership skills.
3. Develop one **peer support resource** (e.g., “how-to” guide or FAQ) for new administrative staff in your division.

3. Wellness and Work-Life Balance

6. Implement a **daily time management strategy** (e.g., 15-minute prioritization check-in or time blocking) for three months and evaluate its impact on stress and efficiency.
7. By XX date, set a **consistent end-of-day routine** that includes closure of active files and inbox zero, to support healthy boundaries.
8. Participate in at least **one CPCS wellness, mindfulness, or DEI-related event per quarter** to foster personal wellbeing and belonging.
9. Track **weekly stress or workload levels** for two months and identify one recurring stressor to address collaboratively with supervisor.

4. Career Reflection and Motivation

11. Maintain a brief **quarterly reflection log** noting accomplishments, challenges, and growth opportunities for use in annual review.

II. Attorneys

 **Guide for Goal Types and Their Meanings (for use in performance review):**

Category	Definition	Typical Focus	Examples
Defined Work Priorities (2-3 required)	“What work gets done.” Concrete deliverables tied to the attorney’s job description, measurable performance outputs, and CPCS’s mission goals.	Case outcomes, client contact, legal research, advocacy quality, collaboration.	Filing deadlines, client meetings, trial preparation, supervision participation.
Professional Development, Wellness, and Personal Care (1-2 required)	“How the employee grows, sustains, and supports their performance.” Focuses on growth, wellbeing, and long-term capability.	Learning, self-care, mentorship, resilience, engagement, work-life balance.	Trainings, debriefs, wellness habits, reflection logs.

Goal Type 1: Defined Work Priorities (What Work Gets Done)

1. Client Representation & Case Management

1. Maintain an **active caseload consistent with CPCS standards**, ensuring that all clients receive timely contact within **XX business days of assignment**.
2. File **all required motions within statutory or procedural deadlines**, reducing late filings by **XX% by XX date**.
3. Conduct **pretrial investigations for XX% of cases involving potential incarceration** within **XX days of assignment**.
4. Maintain **consistent tracking of client communication and case updates** by XX date to ensure no lapse in contact beyond XX days.
5. Within the next year, conduct **at least XX contested evidentiary hearings or bench trials** to strengthen courtroom experience.

2. Legal Research, Writing & Advocacy

1. Prepare **XX sample motions or memoranda per quarter** for supervisor feedback to improve legal writing clarity and argumentation.
2. Complete **monthly review of new case law and procedural updates**, sharing key takeaways in team meetings.
3. Within the fiscal year, author at least **one training or practice tip memo** for the office on a recurring legal issue (e.g., suppression, discovery).
4. Incorporate **at least XX cited appellate decision(s)** relevant to each motion filed to ensure robust legal grounding.

3. Collaboration, Mentorship & Interdisciplinary Practice

1. Partner with social work staff on at least **XX client cases** by XX date to develop comprehensive, holistic defense strategies.
2. Participate in **one multi-disciplinary case conference per quarter** to improve client outcomes through cross-functional teamwork.
3. Provide **mentorship or peer review** to one less-experienced attorney or intern, including at least two structured feedback sessions annually.

4. Trial Preparation & Performance

1. Develop **a standardized pretrial checklist** by XX date to ensure consistent readiness across all active cases.
2. Conduct **XX mock trial segments** (e.g., openings, closings, cross-examinations) with peer feedback before XX date.
3. Achieve **a XX% on-time submission rate** for discovery and pretrial filings throughout FY26.
4. Review **XX prior trial transcripts** to identify and log best practices and improvement areas by the next performance cycle.

5. Community & Equity-Focused Representation

1. By XX date, attend at least **two DEI or community engagement events** that strengthen understanding of client cultural and social contexts.
2. Integrate at least **one culturally competent strategy** (e.g., interpreter use, trauma-informed approach) per client case and discuss results during supervision.

3. Within the year, develop a **short “client rights and court process” reference sheet** in plain language to distribute during client meetings.

6. Quality, Efficiency & Accountability

1. Use **CPCS-approved case management tools** to log all case activity within XX hours of occurrence for at least XX% of cases.
 2. Conduct **quarterly file reviews** to ensure accuracy, completeness, and compliance with CPCS recordkeeping policies.
 3. Document and review **monthly time allocation** to identify and reduce administrative inefficiencies by XX%.
 4. Reduce **continuance requests initiated by defense** by XX% through improved preparation timelines.
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Goal Type 2: Professional Development, Wellness, and Personal Care (How You Grow, Sustain, and Thrive)

1. Professional Development & Learning

1. Attend at least **XX CPCS or MCLE continuing legal education trainings** by XX date, including one outside of core practice area.
2. Identify **two skill areas for growth** (e.g., expert cross-examination, appellate writing) and complete related trainings by midyear.

2. Emotional and Mental Wellness

3. Implement a **post-trial debrief routine** (solo or peer-based) within 72 hours after each major hearing or trial to process emotional impact.
4. Schedule at least **one mental health or resilience workshop** or session per quarter to support sustainable advocacy.
5. Identify **two strategies to manage compassion fatigue** (e.g., mindfulness, peer debrief) and track practice weekly for eight weeks.

3. Physical and Environmental Wellness

6. Commit to **two walking breaks or stretch sessions per workday** for three consecutive months to counter sedentary court work.

7. Review and adjust **workspace ergonomics** by XX date to reduce physical strain during long hours of writing or remote work.

4. Social and Occupational Wellness

8. Participate in **one office-based morale or community-building event** per quarter (e.g., lunch-and-learn, wellness walk).
9. Engage in **one external professional or social network** (bar association, DEI coalition) by XX date to expand collegial support.

5. Reflective Practice & Purpose

10. Maintain a **quarterly reflection log** documenting lessons learned, meaningful wins, and areas of growth to discuss during the next annual review.

III. Investigator Roles

 **Guide for Goal Types and Their Meanings (for use in performance review):**

Category	Definition	Typical Focus	Examples
Defined Work Priorities	“What work gets done.” Core deliverables tied to investigative duties and the defense function.	Accuracy, timeliness, fieldwork quality, collaboration, reporting, and evidence handling.	Case documentation, witness contact logs, photo documentation, data research, timely communication.
Professional Development, Wellness, and Personal Care	“How the investigator grows and sustains performance.” Goals centered on skill enhancement, safety, and wellbeing.	Training, resilience, technical specialization, field safety, and balance.	Attending trainings, developing protocols, creating toolkits, maintaining wellness boundaries.

Goal Type 1: Defined Work Priorities (What Work Gets Done)

1. Investigative Excellence & Casework Quality

16. Complete all **assigned investigative tasks within case deadlines**, ensuring that at least **90% of attorney requests** are fulfilled on or before the agreed-upon timeline.
17. Conduct **crime scene visits within XX business days** of assignment in XX% of eligible cases.
18. Submit **comprehensive investigative reports** for every assigned case within **XX hours of completing fieldwork**.
19. Reduce the number of **returned or incomplete investigative reports** by **XX%** by XX date through improved internal peer review or supervisor feedback.
20. Review and log **all assigned cases weekly** to confirm investigative progress and pending requests.

2. Witness and Client Contact

- 21. Maintain contact logs documenting **100% of witness and client interviews** within 24 hours of contact.
- 22. Ensure **all witness statements are recorded, summarized, and uploaded** to the case file within XX business days.
- 23. Schedule and complete **in-person witness interviews** in at least XX% of active investigations unless otherwise directed by the attorney.
- 24. Implement a **standard witness tracking sheet** by XX date to monitor interview completion, availability, and court readiness.
- 25. Document **client-related investigative updates** for 100% of cases in shared systems by the end of each month.

3. Evidence Collection & Documentation

- 26. Maintain an **organized digital folder** for photographs, diagrams, and exhibits for every case, ensuring files are properly labeled and dated.
- 27. By XX date, create a **reference guide for proper photo labeling and evidence chain of custody documentation** to ensure consistency across investigators.
- 28. Photograph or diagram **at least XX% of major crime scenes or key evidence sites** in assigned cases.
- 29. Use **geotagging or metadata-enabled devices** for XX% of future field photos to enhance evidentiary credibility.

4. Research, Records, and Technology

- 29. Utilize **at least three digital research tools** (public records, social media, RMV, or criminal databases) in each investigation to corroborate information.
- 30. Review and analyze **XX% of police reports and discovery materials** within XX business days of receipt.
- 31. Develop a **searchable internal index or spreadsheet** by XX date to log recurring sources, contacts, and data vendors.

5. Communication and Collaboration

- 34. Provide **weekly status updates** to attorneys on all open cases via email or Teams, including pending tasks and next steps.

35. Attend **biweekly team meetings** to align investigative strategy with attorneys and social workers.
36. Conduct **one case debrief per quarter** with the supervising investigator to discuss lessons learned and areas for improvement.
37. Respond to all attorney or supervisor requests within **one business day**, even if the full information requires additional time to obtain.
38. Maintain **open communication with other CPCS divisions** when cross-jurisdictional or multi-defendant cases require information sharing.

6. Testimony & Court Readiness

1. Prepare a **minimum of XX court-ready exhibits or visuals** per quarter (maps, diagrams, timelines).
2. Complete a **mock testimony or report presentation exercise** by XX date to strengthen courtroom communication and precision.

Goal Type 2: Professional Development, Wellness, and Personal Care (How You Grow and Sustain Performance)

1. Technical & Professional Development

6. Attend **at least XX CPCS or external trainings** annually related to investigation, forensics, or witness interviewing.
7. Identify **one area of specialization** (e.g., digital evidence, cell-site data, surveillance, or trauma-informed interviewing) and complete a related certification or training by year-end.
8. Participate in **one cross-training session** with attorneys or social workers per quarter to better understand case integration.
9. Build a **personal investigation toolkit** (templates, checklists, forms) and share with at least one peer by XX date.
10. Review **XX recent appellate or trial cases** annually to understand evolving evidentiary standards and adjust investigative practices.

2. Safety, Organization, and Efficiency

11. Review and update **personal safety protocols** quarterly, ensuring compliance with CPCS fieldwork safety policies.
12. Implement a **time management system** (e.g., weekly priority planning) for fieldwork and reporting and evaluate its effectiveness after three months.
13. Maintain an **organized digital workspace**, ensuring all files are properly backed up and no sensitive data is stored locally by XX date.

3. Wellness and Work-Life Balance

15. Schedule at least **two full days off per quarter** from fieldwork for administrative catch-up, reflection, or rest.
16. Participate in at least **one CPCS wellness or peer support event per quarter** to foster resilience and reduce fieldwork stress.
17. Establish a **personal boundary policy** (e.g., no field interviews after 7 p.m. without safety check-in) and share it with supervisor for accountability.

IV. Manager/Supervisor Roles (Attorney Roles – Supervising Attorney, AIC, Director)

 **Guide for Goal Types and Their Meanings (for use in performance review):**

Category	Definition	Typical Focus	Examples
Defined Work Priorities	“What work gets done.” Core deliverables tied to supervision, quality assurance, and leadership in client-centered advocacy.	Case supervision, training, division collaboration, compliance, and leadership accountability.	Coaching and check-ins, standardizing supervision, cross-divisional coordination, audit accuracy.
Professional Development, Wellness, and Personal Care	“How supervisors grow and lead sustainably.” Focused on leadership development, inclusion, feedback, and resilience.	Self-reflection, DEI learning, boundary-setting, and mentorship.	Leadership plan, peer consultation, feedback integration, wellbeing activities.

Goal Type 1: Defined Work Priorities (What Work Gets Done)

1. Supervision, Performance, and Feedback

1. Conduct **biweekly supervision meetings** with each supervisee, reviewing case files, motions, and trial prep for quality and timeliness.
2. Develop and implement a **written supervision plan** by XX date outlining performance expectations and mentorship goals.
3. Attend or second-seat **XX trials or major hearings per supervisee per year** to observe advocacy skills and provide targeted feedback.
4. Document all supervision and feedback discussions in accordance with division policy within one week of occurrence.

2. Case Quality and Client Advocacy

1. Review **all major motions, trial strategies, and sentencing plans** in high-stakes cases under supervision.
2. Monitor **client contact compliance rates** for supervisees quarterly and ensure 100% corrective action where lapses occur.
3. Facilitate **monthly case-round or group supervision sessions** focused on complex advocacy or ethical issues.

4. Ensure that supervisees meet or exceed **90% on-time filing compliance** for discovery and pretrial submissions.

3. Leadership and Office/Division Management

1. Coordinate **monthly office meetings** to review updates, policy changes, and professional successes.
2. Develop and maintain **office-specific systems or manuals** for case assignment, coverage, and onboarding by XX date.
3. Implement a **cross-functional collaboration plan** with social workers, investigators, and admin staff to enhance holistic defense.
4. Conduct **quarterly audits of case files or data entries** for accuracy and compliance with CPCS documentation standards.
5. Maintain **open communication channels** with more senior leadership through monthly status summaries.

4. Training and Staff Development

1. Facilitate or co-facilitate at least **XX internal training sessions per year** on trial skills, supervision, or substantive law.
2. Pair each new hire with a **mentor or peer coach** within one month of start date, and check in at least monthly for six months.
3. For AICs and Managing Directors, **update office continuity and coverage plans** annually and communicate them to staff.

5. Division and Agency Leadership

1. Represent the division in **at least one cross-divisional or statewide committee or working group** per year.
 2. Collaborate with other supervisors or leaders in the same role to **standardize supervision practices** and reduce performance disparities.
 3. Lead or contribute to **one policy, legislative, or advocacy initiative** that aligns with CPCS's mission by XX date.
 4. Develop and share **quarterly metrics or outcomes summaries** that highlight team successes and identify system barriers.
 5. For directors or AICs, ensure **100% compliance with diversity, equity, and inclusion commitments** (training, hiring, and practice standards).
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Goal Type 2: Professional Development, Wellness, and Personal Care (How You Grow and Sustain Performance)

1. Leadership and Management Growth

1. Attend at least **two advanced supervision or management trainings** (e.g., coaching, feedback, inclusive leadership) by September 2026.
2. Participate in a **peer consultation group** for supervisors, meeting quarterly to exchange strategies and troubleshoot common challenges.
3. Engage in **shadowing or co-supervision opportunities** with another division leader by XX date to promote cross-divisional learning.
4. Mentor **one emerging leader** (attorney or staff) by providing quarterly guidance and leadership skill-building support.

2. Communication and Collaboration

1. Facilitate **one team-building or recognition event per quarter** to promote morale and community.
2. Solicit **360-degree feedback** from at least three team members annually and identify one improvement focus area.
3. Participate in **at least one DEI-focused workshop or dialogue** annually and integrate learnings into supervision practices.

3. Reflection, Resilience, and Balance

1. Maintain a **monthly reflection journal or supervision log** documenting key decisions, lessons learned, and leadership insights.
2. Protect **one “no-meeting” half day per month** for strategic planning, reflection, or rest.
3. Participate in at least **one CPCS wellness or mindfulness activity** quarterly and encourage team participation.
4. Model healthy work boundaries by **delegating and communicating clear expectations** to prevent burnout—for self and team.
5. Schedule **annual vacation and leadership coverage plans** in advance to ensure continuity and modeling of sustainable practice.

V. Manager/Supervisor (Non-Attorney Roles – Operations, AA, Social Work, Investigator Supervisors)

 Guide for Goal Types and Their Meanings (for use in performance review):

Category	Definition	Typical Focus	Examples
Defined Work Priorities	“What work gets done.” Operational, supervisory, and strategic goals that ensure the team’s success and service delivery.	Performance management, compliance, operations, quality improvement, cross-functional collaboration.	Workflow audits, SOP documentation, DEI integration, data accuracy checks.
Professional Development, Wellness, and Personal Care	“How the supervisor grows and leads sustainably.” Emphasizes leadership growth, wellbeing, and supportive supervision.	Coaching, mentorship, resilience, reflection, inclusion, work-life balance.	Leadership training, peer feedback, mindfulness, mentoring emerging staff.

Goal Type 1: Defined Work Priorities (What Work Gets Done)

***Note that more specific supervisory goals per role follow the general goals (Categories 6-11).**

1. Leadership, Oversight, and Supervision

19. Conduct **biweekly supervision meetings** with all direct reports to review priorities, address challenges, and provide feedback.
20. Develop or update **clear documentation of staff responsibilities and workflows** by XX date.
21. Ensure **all new staff receive structured onboarding and role training** within their first 30 days.
22. Complete 100% of **mid-year performance check-ins** process by May 2026 to support ongoing feedback and growth.

2. Communication and Collaboration

24. Facilitate **monthly team meetings** to review updates, recognize achievements, and align priorities.

25. Create and share a **quarterly communication summary** (email or dashboard) to keep staff informed about policy or procedural updates.
26. Coordinate **one cross-department collaboration project per year** to improve service delivery between administrative, operations, and legal divisions.
27. Maintain **consistent communication with senior leadership**, summarizing key accomplishments and obstacles monthly.
28. Establish or reinforce **standardized communication protocols** for internal and external inquiries by XX date.

3. Operational Management and Efficiency

26. Conduct **quarterly workflow or process reviews** to identify inefficiencies and propose at least one improvement per quarter.
27. Ensure all assigned department or division reports (e.g., financial, HR, or caseload metrics) are submitted **accurately and on time 100% of the time**.
28. Develop and document **standard operating procedures (SOPs)** for at least two recurring processes by XX date.
29. Introduce **a staff coverage or cross-training plan** to ensure continuity of operations during absences by XX date.
30. Maintain a **90% task completion rate** across all team deliverables according to project or program deadlines.

4. Quality Assurance and Compliance

31. Perform **quarterly quality assurance checks** on team outputs (e.g., reports, case documentation, payments) to ensure accuracy and compliance.
32. Monitor and document **100% compliance with agency confidentiality and data-protection policies**.
33. In finance, IT, or facilities settings, ensure **zero audit findings or compliance exceptions** through proactive reviews and documentation.
34. Review and reconcile **key data sets or reports monthly**, verifying accuracy and completeness (e.g., MMARS entries, vendor logs, or staff lists).

5. Strategic Leadership and Agency Contribution

34. Participate in at least **one cross-division committee or agency-wide initiative**.
35. Develop **a division-specific improvement project proposal** (policy, workflow, or resource efficiency) and present it to leadership by XX date.
36. Contribute to **annual planning or budget forecasting** by submitting accurate data and recommendations by designated deadlines.
37. Ensure **diversity, equity, and inclusion goals** are incorporated into at least one team initiative or policy revision each year.
38. Document and communicate **team metrics or success stories quarterly** for inclusion in agency reporting or internal communications.

6. Specific Goals for Supervising AA's

16. Develop and maintain a **shared office procedure manual** by XX date covering filing, case opening/closing, and data-entry standards.
17. Conduct **monthly quality audits of case files and correspondence logs**, maintaining a ≥ 95 % accuracy rate.
18. Implement a **cross-coverage plan** for all admin functions by XX date to guarantee seamless support during absences.

7. Specific Goals for Supervisors of Social Work

21. Conduct **quarterly case-consultation or supervision sessions** with every Social Worker/SSA to ensure consistent, trauma-informed practice.
22. Develop and launch a **new social-work metrics dashboard** by XX date tracking caseloads, service outcomes, and timeliness.
23. Collaborate with the Training Unit to **create XX division-wide professional-development sessions** (e.g., on secondary trauma, family engagement) per year.
24. Review and update **division social-work standards and forms** by XX date to ensure statewide consistency and compliance.
25. (Professional Development) Complete one **leadership or licensure-supervision continuing-education program** by August 2026 and implement one new reflective-supervision technique.

8. Specific Goals for Finance/Facilities Supervisors

26. Achieve **zero overdue vendor payments** by maintaining a monthly compliance tracker starting XX dates.
27. Conduct **quarterly reconciliation reviews** of MMARS/MOSAIC entries or facility expenditures with ≤ 1 % error rate.
28. Develop **preventive-maintenance or fiscal-closeout checklists** for each site/unit by XX date.
29. Lead at least **two process-improvement projects** (e.g., paperless approvals, budget-tracking automation) by year-end.
30. (Professional Development) Attend one **Commonwealth fiscal-policy or asset-management training** and one **leadership-skills course** by September 2026.

9. Specific Goals for IT Managers/Supervisors

31. Maintain **99.5 % system uptime** across CPCS infrastructure, verified through quarterly performance reports.
32. Implement a **documented change-management process** by XX date to improve transparency and reduce service disruptions.
33. Complete **XX cybersecurity or cloud-governance audits** per year and address all findings within XX days.

34. Launch **quarterly staff tech-training sessions** (Teams, OneDrive, security best practices) with XX% staff participation.
35. Earn or renew one **professional certification** (e.g., Azure Admin, ITIL Foundations) by XX date and schedule quarterly leadership coaching check-ins.

10. Specific Goals for HR Managers

34. Ensure **XX % completion of planned projects** across all divisions by posted deadlines.
35. Lead **two manager-training or coaching sessions per quarter** on feedback, documentation, or progressive discipline.
36. Conduct **quarterly analysis of HR metrics** (attrition, time-to-hire, leave utilization) and present findings with improvement plans.
37. Review and update **XX key HR policies or guidance documents** by XX date to reflect best practices and compliance.
38. (Professional Development) Complete one **advanced employee-relations or organizational-development certification** (e.g., SHRM-SCP) by year-end.

11. Specific Goals for Supervising Investigators

1. Review **100 % of supervisee investigative reports** within XX business days of submission, ensuring consistency and accuracy.
2. Conduct **field shadowing for each investigator XX times per year** to evaluate performance and mentor best practices.
3. Maintain a **regional training schedule** delivering at least XX investigator workshops annually.
4. Develop and maintain a **case-assignment tracking database** by XX date for caseload distribution and productivity monitoring.
5. (Professional Development) Attend one **national or regional investigator-skills conference** and lead one internal training session by XX date.

Goal Type 2: Professional Development, Wellness, and Personal Care (How You Grow and Sustain Performance)

1. Leadership Development and Learning

1. Complete **at least two supervisory or leadership trainings** (e.g., feedback delivery, coaching, inclusive supervision) by September 2026.
2. Request **360-style feedback** from at least three team members or peers annually and incorporate learnings into practice.

3. Create a **personal leadership development plan** with measurable goals by December 2025.
4. Identify and mentor **at least one emerging leader or high-potential staff member** by June 2026.
5. Attend or present at **one professional conference or agency training** related to leadership, DEI, or supervision.

2. Collaboration and Culture

6. Facilitate at least **two structured team-building or morale-boosting activities per year**.
7. Model **inclusive supervision** by incorporating DEI considerations into performance discussions and team planning.
8. Participate in **a cross-division mentorship or peer-learning network** to exchange best practices in management.

3. Reflection, Resilience, and Wellness

11. Maintain a **quarterly leadership reflection log** capturing lessons learned, challenges, and adjustments for the next quarter.
12. Schedule **at least one uninterrupted “strategy block” per month** to focus on planning rather than reactive work.
13. Participate in at least **one CPCS wellness or mindfulness session per quarter**, sharing takeaways with your team.
14. Establish **clear personal work boundaries** (e.g., designated no-email hours or coverage plans) and model them for your staff.
15. Take **a full week of uninterrupted vacation annually**, ensuring leadership continuity through proper delegation.

VI. Operations Roles (ex. IT, HR, Finance, Facilities)

****This particular goal bank was designed with a number of diverse roles in mind. Read with an eye to what you can use relevant to your own (very specific) role!**

 **Guide for Goal Types and Their Meanings (for use in performance review):**

Category	Definition	Typical Focus	Examples
Defined Work Priorities	“What work gets done.” Outcomes tied to operational success, process reliability, and service delivery.	Project completion, accuracy, timeliness, and interdepartmental coordination.	Completing facility projects on schedule, processing vendor payments accurately, maintaining IT uptime, recruiting diverse talent.
Professional Development, Wellness, and Personal Care	“How you grow and sustain performance.” Reflects learning, balance, and leadership in service excellence.	Continuous learning, team collaboration, self-care, and communication.	Attending trainings, developing certifications, improving hybrid work balance, leading a cross-functional project.

Goal Type 1: Defined Work Priorities (What Work Gets Done)

1. Project & Systems Management

19. Complete all assigned projects on time and within scope, with **no more than one project deadline extension per quarter**.
20. Develop and maintain a **project tracker or dashboard** by XX date to monitor deadlines, dependencies, and responsible parties.
21. For cross-departmental projects, document and share a **written process summary or job aid** within two weeks of completion.
22. Implement at least **one process improvement initiative** (automation, template, or workflow optimization) by XX date that increases efficiency by measurable output (e.g., fewer manual steps or reduced turnaround time).
23. Prepare and present **monthly progress reports** to leadership on department goals and deliverables.

2. Data, Reporting, and Accuracy

- 24. Maintain **100% data accuracy rate** on key reporting metrics (e.g., vendor records, employee entries, payment transactions).
- 25. Audit and reconcile **data systems or logs quarterly** to identify and correct discrepancies.
- 26. Develop a **standardized reporting template** by XX date for recurring team or leadership reports.
- 27. In HR/Finance roles: process and approve **XX% of requests (vendor setups, payments, benefits updates, etc.) within XX business days**.
- 28. In IT roles: maintain **XX% resolution rate on first-contact support tickets** by XX date.

3. Technology and Systems Administration (IT-specific)

- 26. Conduct **quarterly reviews of system permissions and access levels** to ensure compliance with CPCS protocols.
- 27. Document and maintain **a library of technology or process FAQs** by XX date for internal users.
- 28. Implement at least **one new feature or functionality** (e.g., workflow automation, improved form submission) that enhances user experience.
- 29. Achieve **zero data loss incidents** through proactive system backups, verification logs, and testing twice per year.

4. Vendor, Procurement, and Fiscal Operations (Finance-Specific)

- 31. Process **all vendor or payment transactions within CPCS policy timeframes**, maintaining a 98% accuracy rate.
- 32. Develop **a monthly reconciliation checklist** to ensure compliance with Commonwealth finance standards by XX date.
- 33. Provide **timely support to internal clients and/or external vendors**, achieving at least XX% satisfaction in post-transaction feedback surveys (if available).

5. Client and Employee Service Excellence

- 34. Respond to employee or partner inquiries within **XX business day(s)**, maintaining a 95% responsiveness rate.
- 35. Conduct **biannual satisfaction pulse surveys** for HR, IT, or Facilities users and use results to guide service improvements.
- 36. Improve **onboarding or offboarding process** turnaround times by XX% by optimizing workflows.
- 37. For Talent or Outreach roles: host or coordinate **at least XX outreach or recruitment events** by XX date to strengthen candidate pipelines.

38. For Facilities or IT roles: complete **annual safety and accessibility audits** for all CPCS offices and submit reports by XX date.

6. Communication and Collaboration

1. Lead or co-lead **one cross-departmental working group or improvement initiative** annually to strengthen collaboration.
 2. Document and communicate **major process changes** to stakeholders within XX hours of implementation to ensure transparency.
-

Goal Type 2: Professional Development, Wellness, and Personal Care (How You Grow and Sustain Performance)

1. Professional Learning and Growth

6. Attend at least **XX external or CPCS-sponsored trainings** relevant to your functional area (HR, Finance, IT, Facilities, etc.) by year-end.
7. Pursue **one certification or continuing education opportunity** (e.g., SHRM-CP, PMP, CompTIA, Excel or data analytics course) by XX date.
8. Shadow a peer in another CPCS department at least once during the year to better understand interdepartmental operations.
9. Lead or co-facilitate **a knowledge-sharing or training session** for peers by XX date.

2. Communication and Collaboration

11. Request **feedback from at least two internal stakeholders or clients** per quarter on clarity, responsiveness, or service quality.
12. Join or volunteer for **one cross-agency committee, task force, or DEI initiative** to support agency-wide engagement.
13. Practice proactive communication by providing **weekly status updates** to supervisors or team leaders on priorities and progress.

3. Wellness and Work-Life Balance

15. Schedule and protect **one weekly “focus block”** for uninterrupted, deep work or project completion for at least XX consecutive weeks.
16. Take **at least two full days per quarter** for planning, rest, or catch-up without meetings or client contact.
17. Participate in at least **one CPCS wellness or mindfulness program** per quarter and share a takeaway with your team.

18. Evaluate and adjust **remote/hybrid work habits** to ensure a sustainable and healthy work-life rhythm by midyear.

VII. Paralegal Roles

 **Guide for Goal Types and Their Meanings (for use in performance review):**

Category	Definition	Typical Focus	Examples
Defined Work Priorities	“What work gets done.” Goals tied to day-to-day responsibilities, output quality, and service delivery.	Research accuracy, case documentation, responsiveness, panel support, compliance.	Timely responses, file accuracy, maintaining databases, assisting with training or reports.
Professional Development, Wellness, and Personal Care	“How performance is sustained and improved.” Goals centered on growth, learning, and resilience.	Skill expansion, communication, self-organization, wellbeing.	Attending trainings, applying new tech skills, time-management systems, wellness activities.

Goal Type 1: Defined Work Priorities (What Work Gets Done)

1. Case and Project Support

1. Complete **100% of assigned case or project tasks** within agreed timelines each month.
2. Maintain **accurate and current case logs or project tracking databases**, updated within XX hours of any case change.
3. Review **court dockets and filings weekly** to ensure that all relevant updates are logged and communicated to attorneys.
4. Draft or prepare **at least XX key litigation support documents per month** (motions indexes, summaries, affidavits, or case charts).
5. Respond to attorney or client information requests within **XX business days**, ensuring clarity and confidentiality.

2. Research, Analysis, and Records

6. Conduct **factual or legal research for 100% of assigned projects**, ensuring documentation of sources and results.
7. Submit at least XX **public records requests or data inquiries per quarter**, and log responses for tracking.
8. Create or update a **centralized research folder or shared drive** for your unit by XX date, with consistent naming and versioning.

9. Summarize and organize **data from at least XX major cases or systemic research efforts** by XX date.
10. Maintain **zero unresolved or unfiled data discrepancies** in internal tracking systems each quarter.

3. Client, Panel, and Public Communication

11. Answer or return **100% of intake calls and client inquiries within XX business days** and log each interaction.
12. Maintain a **monthly call log report** for supervisor review, tracking response times and outcomes.
13. Develop a **referral or resource list** (e.g., for community or mental health resources) by XX date and review quarterly for accuracy.
14. Provide **consistent, trauma-informed communication** to callers and clients per CPCS service standards.
15. Draft **monthly summary memos** to update attorneys or unit leadership on case intake, assignments, or data patterns.

4. Documentation, Compliance, and Quality

16. Maintain **100% compliance with data retention and confidentiality standards**, verified during quarterly audits.
17. Implement a **file-naming or documentation standardization project** by XX date to improve accessibility.
18. Verify **all assignment or certification documentation** for accuracy before submission (goal: <2% corrections).
19. Support **two unit-wide or division-wide reporting projects** annually, ensuring complete and accurate data entry.

5. Interdepartmental Coordination

21. Collaborate with other divisions (e.g., PDD, MHLD, SLU) on **at least one cross-unit initiative** per year to streamline information sharing.
22. Attend **monthly staff or case-team meetings** and contribute one idea for improving processes each quarter.
23. Participate in **case review or data-quality meetings** and submit one follow-up improvement suggestion per quarter.
24. Coordinate with other departments on **database or records management improvements** by XX date.
25. Assist attorneys with **at least one presentation or training preparation** (slides, materials, case data) by year-end.

Goal Type 2: Professional Development, Wellness, and Personal Care (How You Grow and Sustain Performance)

1. Professional Skill Development

- 26. Attend **at least XX CPCS or external training sessions** (legal research, data analysis, communication) by XX date.
- 27. Learn and apply **a new software skill** (Excel pivot tables, SharePoint data management, or e-discovery tools) by XX date.
- 28. Identify one **specialization area** (e.g., post-conviction data, public records law, or mental-health advocacy) and develop expertise through training or mentorship.
- 29. Participate in **quarterly unit learning sessions** or trainings to share recent findings or process improvements.
- 30. Cross-train with another division at least once by XX date to enhance system understanding.

2. Communication, Teamwork, and Collaboration

- 31. Seek **formal feedback from your supervising attorney or manager** at least XX per every XX months on work quality and communication.
- 32. Share **one best practice or efficiency tip per quarter** during team meetings or via shared documents.
- 33. Contribute to **one DEI or employee-engagement initiative** (panel, committee, or event) by XX date.

3. Wellness, Resilience, and Organization

- 34. Set aside **15 minutes weekly for inbox or case log cleanup** for three consecutive months to maintain organization.
- 35. Participate in at least **one CPCS wellness, mindfulness, or resilience activity** per quarter and share one takeaway.
- 36. Identify and track **two personal productivity habits** (e.g., daily task prioritization, time blocking) and review their impact quarterly.
- 37. Maintain a **personal learning or reflection log** noting growth areas and successes each quarter for use in the annual review.
- 38. Schedule and take **at least one uninterrupted personal day per quarter** to support balance and wellbeing.

VIII. Social Services & Social Work Roles

 **Guide for Goal Types and Their Meanings (for use in performance review):**

Category	Definition	Typical Focus	Examples
Defined Work Priorities	“What work gets done.” Case- and service-based outcomes tied to advocacy, coordination, and client wellbeing.	Direct client contact, case management, interdisciplinary collaboration, and systems navigation.	Writing advocacy letters, developing service plans, facilitating reunification, completing court reports.
Professional Development, Wellness, and Personal Care	“How the employee grows and sustains performance.” Focused on professional learning, reflective practice, resilience, and self-care.	Learning and supervision, cross-division collaboration, DEI engagement, wellness practices.	Attending trainings, maintaining reflective supervision, setting boundaries, participating in wellness events.

Goal Type 1: Defined Work Priorities (What Work Gets Done)

1. Client Advocacy and Case Management

1. Complete **intake interviews for 100% of new client referrals within XX business days** of assignment.
2. Maintain **active contact with all assigned clients**, with no lapse of more than XX days between check-ins, unless case circumstances prevent contact.
3. Develop and document **individualized service or treatment plans** for all assigned clients within XX days of case opening.
4. Track client progress in the case management system (e.g., Zelly), updating notes within **XX hours of each contact**.
5. (If applicable) Conduct **home, hospital, or facility visits for at least XX% of assigned clients**, ensuring accessibility and continuity of care.

2. Collaboration and Interdisciplinary Teamwork

6. Participate in **weekly or biweekly defense team meetings** with attorneys, investigators, and staff to align strategy and services.
7. Provide **written case updates or social history summaries** prior to major hearings or case milestones.

8. Attend **at least one multidisciplinary or community-based meeting per client case** to coordinate resources or advocate for services.
9. Collaborate with external agencies (e.g., DCF, DYS, DMH, service providers) to ensure **timely delivery of agreed services** for at least XX% of cases.
10. Document all interagency contacts in client files within XX hours of communication.

3. Court and Case Support

11. Prepare **at least one written report or advocacy letter per case** to support dispositional or sentencing outcomes.
12. Provide **courtroom testimony or dispositional recommendations** in XX% of eligible cases, when authorized by the attorney.
13. Attend **court hearings for all assigned cases where social service input is required** and debrief with the attorney post-hearing.
14. Support attorneys by **identifying two new community-based program options per quarter** for diversion, treatment, or reunification.
15. Assist in developing **mitigation packets or client narratives** in at least XX cases per quarter to inform advocacy strategies.

4. Specialized Client Work (**Remember these are examples!**)

16. Conduct **crisis intervention or short-term stabilization planning** within 24 hours of referral in at least XX% of cases.
17. For youth clients, develop **age-appropriate Positive Youth Development (PYD) goals** and review progress monthly with the defense team.
18. For MHLI cases, ensure **pre-hearing biopsychosocial reports** are completed within XX business days of case assignment.
19. For CAFL and parent advocacy cases, coordinate **service referrals that promote family reunification** in XX% of active care-and-protection cases.
20. For PDI or YAD cases, complete **sentencing mitigation or reentry plans** for XX% of clients receiving post-disposition supervision.

5. Program and Systems Improvement

21. Maintain a **resource database** of community programs, updated quarterly and shared across divisions.
22. Submit at least **one process-improvement or resource-access proposal** annually to your supervisor or director.
23. Collaborate with the Social Work or SSA Director to develop **training materials or internal guides** by XX date.
24. Track and report **quarterly data on client services provided** (e.g., housing referrals, program enrollments, reunifications).
25. Ensure **100% compliance with CPCS confidentiality and data-entry standards**, as verified by quarterly audit.

Goal Type 2: Professional Development, Wellness, and Personal Care (How You Grow and Sustain Performance)

1. Professional Growth and Learning

- 26. Attend at least **XX CPCS or external trainings annually** related to trauma-informed practice, motivational interviewing, or systemic advocacy.
- 27. Complete a **specialized certification or workshop** (e.g., domestic violence, substance use, child development, forensic social work) by September 2026.
- 28. Participate in **one shadowing or peer case consultation** outside your division each year to expand cross-disciplinary understanding.
- 29. Present or co-facilitate **one in-house training or case discussion** for peers by XX date.

2. Reflective Practice and Supervision

- 31. Engage in **monthly reflective supervision** or debrief meetings and document one key learning outcome each time.
- 32. Complete **quarterly self-assessments** identifying progress toward professional goals and client service impact.
- 33. Implement a **feedback loop** by requesting structured feedback from attorneys or clients XX times annually.

3. Diversity, Equity, and Inclusion

- 34. Attend at least **one DEI or cultural competency training per quarter** and apply learnings to a case or client interaction.
- 35. Contribute to **one community engagement or DEI initiative** (panel, committee, outreach event) by year-end.

4. Wellness and Self-Management

- 36. Establish a **weekly organization system** (e.g., time-blocking or priority planning) to manage client workload efficiently for three months.
- 37. Participate in at least **one CPCS wellness or mindfulness event** per quarter to promote self-care and resilience.
- 38. Schedule a **minimum of one uninterrupted personal day each quarter** for rest, planning, or self-care activities.
- 39. Maintain **regular supervision check-ins focused on workload and emotional wellbeing**, and identify at least one practice for stress reduction.

IX. Training Unit Roles

 **Guide for Goal Types and Their Meanings (for use in performance review):**

Category	Definition	Typical Focus	Examples
Defined Work Priorities	“What work gets done.” Deliverables tied to training production, quality, and cross-practice collaboration.	Curriculum development, project management, facilitation, innovation, data tracking.	Delivering training events, updating resources, managing cross-division projects.
Professional Development, Wellness, and Personal Care	“How growth and performance are sustained.” Goals centered on creativity, reflection, collaboration, and wellbeing.	Learning, innovation, DEI engagement, mentorship, self-care.	Certifications, train-the-trainer sessions, creative time, wellness participation.

Goal Type 1: Defined Work Priorities (What Work Gets Done)

1. Training Design, Delivery, and Facilitation

1. Develop and facilitate **at least XX major trainings** (virtual or in-person) for staff or private counsel by September 2026.
2. Design or revise **at least one core curriculum module** (skills, law, DEI, or wellness) each quarter to ensure updated, practice-relevant content.
3. Implement **participant feedback surveys for 100% of major trainings**, achieving at least a XX% satisfaction rate in “clarity” and “relevance.”
4. Record and edit **at least XX training sessions** for posting on the learning management system (eg. TalentLMS) within the fiscal year.
5. Develop **XX cross-practice collaborative trainings** (e.g., CAFL–MHLD or YAD–PDD) by XX date to strengthen holistic defense capacity.

2. Curriculum Development and Content Management

6. Create and maintain **a curriculum tracking spreadsheet** by XX date showing course frequency, facilitators, and update cycles.
7. Review and update **XX existing training outlines or resource materials** to align with current law, DEI standards, and CPCS policies.
8. Draft or edit **at least XX new written training resources** (practice tips, sample motions, or guides) each quarter.

9. Collaborate with division leaders to **identify annual training priorities** and publish a Training Calendar for the rest of the year by XX date.
10. Integrate **equity and cultural humility principles** into at least XX% of new or revised materials by year-end.

3. Program Evaluation and Improvement

11. Develop or revise a **standardized post-training evaluation form** with both quantitative and qualitative metrics by XX date.
12. Conduct **biannual reviews of training outcomes** and propose one measurable improvement for the next cycle.
13. Create a **dashboard of training participation data** (attendance, region, any other relevant data) by XX date.
14. Introduce **at least one pilot training innovation** (micro-learning, hybrid format, or peer-led series) by XX date.
15. Document a **complete end-to-end workflow for training production** (planning → delivery → archiving) to ensure department-wide consistency.

4. Technology and Platform Support (Technologist-Focused)

16. Produce and edit **at least XX training videos** per quarter for use in asynchronous learning.
17. Develop and publish a **technology quick-start guide or FAQ** for presenters by XX date.
18. Evaluate and recommend **at least one new technology tool** (polling, captioning, accessibility, analytics) for pilot by XX date.
19. Implement a **monthly system audit** to verify that all training content is accessible and properly tagged.

5. Cross-Practice Coordination and Department Operations

21. Manage **cross-practice project timelines and budgets** to ensure 100% of deliverables are on schedule.
 22. Maintain **comprehensive project documentation** (minutes, trackers, deliverables) for all cross-practice initiatives.
 23. Lead or co-lead **one grant or funding proposal** for training innovation by September 2026.
 24. Conduct XX **training needs assessments per year** and summarize findings for leadership.
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Goal Type 2: Professional Development, Wellness, and Personal Care (How You Grow and Sustain Performance)

1. Professional Growth and Learning

- 26. Attend **at least XX professional development events** (training design, adult learning, DEI, or technology) by September 2026.
- 27. Earn **a professional certification or credential** (e.g., ATD, IDOL, LMS Admin, or PMP) by August 2026.
- 28. Participate in **quarterly peer-observation sessions** with other trainers to exchange feedback and instructional techniques.
- 29. Join at least **one professional learning network or consortium** (e.g., NLADA Training Committee, ATD New England) by XX date.
- 30. Publish or present **one article, webinar, or presentation** on training innovation or legal education best practices by year-end.

2. Collaboration, Mentorship, and Inclusion

- 31. Facilitate **at least one internal learning session** per quarter (topic exchange, train-the-trainer, or design clinic).
- 32. Mentor or co-mentor **one emerging trainer or training fellow** through coaching and observation cycles.
- 33. Solicit and reflect on **360° feedback** from colleagues and participants twice annually.

3. Creativity, Reflection, and Wellness

- 35. Block **one weekly “creative development hour”** to explore new training tools, methods, or content ideas.
- 36. Participate in at least **one CPCS wellness, mindfulness, or DEI-focused event** per quarter.
- 37. Take **two consecutive days each quarter** to rest, plan, or focus on long-term creative development.
- 38. Maintain **a reflective log** tracking lessons learned, feedback received, and personal growth areas after each major project.

X. All Employees: Example Wellness Goals

To aid all CPCS staff in creating effective personal wellness goals, we are providing these additional examples (in addition to the examples related to each specific job type).

Focus: resilience, self-care, boundaries

1. Mental and Emotional Wellness

Focus: stress management, focus, resilience, emotional regulation, boundaries

- I. Block XX minutes XX times per week on my calendar for reflection or mindfulness to reset between emotionally challenging cases.
- II. Complete a short **online course or app-based mindfulness program** (e.g., Headspace or Insight Timer) within the next three months.
- III. Identify **three personal stress triggers** at work by XX date and develop one coping strategy for each, tracked monthly.
- IV. By XX date, schedule **quarterly mental health check-ins** with a counselor, coach, or trusted peer.
- V. Practice **emotion labeling and re-centering** after difficult hearings by journaling or debriefing with a colleague at least once weekly.
- VI. Create a personal **“pause and process” routine** before responding to emotionally charged emails or client calls by XX date.
- VII. By XX date, complete **one training or webinar on compassion fatigue or secondary trauma** and apply two learned techniques.
- VIII. Track mood and energy levels weekly for three months to identify **patterns between workload and emotional wellbeing**.
- IX. Identify **two professional boundaries** to improve (e.g., after-hours email habits) and track progress quarterly.
- X. Attend at least **one wellness or mindfulness session** per quarter and reflect in supervision on its impact.
- XI. Schedule and honor **one uninterrupted day off per quarter** for personal recharge, communicated to supervisor in advance.

2. Social Wellness

Focus: connection, belonging, support networks

- 12. Schedule **monthly informal lunches or check-ins** with coworkers to build connection and reduce isolation.
- 13. Join or actively participate in **one CPCS committee, ERG, or social event** by XX date.
- 14. Reconnect with at least **two professional peers or mentors** by XX date to strengthen my professional support network.
- 15. Organize **one peer debrief group** per quarter for attorneys in my office to share strategies and experiences.

3. Physical Wellness

Focus: energy, strength, rest, nutrition, movement, and overall physical wellbeing

- 16. Incorporate **two 10-minute walks or stretch breaks daily** for the next three months to reduce sedentary time.
- 17. Complete a **30-day step challenge** (goal: average 7,000+ steps/day) by XX date and repeat at mid-year.
- 18. By XX date, establish a **consistent sleep routine** (targeting 7 hours/night) and track progress weekly for eight weeks.
- 19. Replace one **afternoon caffeine or snack break** per day with a brief walk or hydration break for four weeks.
- 20. Enroll in a **wellness or fitness class** (yoga, Pilates, walking group, etc.) by XX date and attend at least XX times per month.
- 21. Keep **healthy snacks and water** accessible at work; aim for at least 64 oz of water daily for one quarter.
- 22. Identify and reduce **one energy-depleting habit** (e.g., skipping meals, working through lunch) and replace it with a healthier routine by XX date.
- 23. Participate in one **CPCS wellness initiative or agency-sponsored challenge** (e.g., steps, hydration, or mindfulness) by XX date.

24. Schedule **one full week of vacation or uninterrupted rest** by XX date to promote long-term recovery and prevent burnout.

4. Occupational Wellness

Focus: purpose, growth, boundaries, satisfaction

25. Identify one **case type or skill area** that most energizes me and request additional training or experience in that area by June 2026.

26. Set and protect one **“no court/no casework” administrative block** weekly to handle planning, email, or reflection.

5. Spiritual or Existential Wellness

Focus: purpose, meaning, alignment with values

27. Read one **book or essay per quarter** that reconnects me with my sense of justice, empathy, or human dignity.

28. By XX date, participate in one **community service, volunteer, or pro bono activity** outside my normal role to reconnect with purpose.

29. Identify and post in my workspace a **personal mission statement** by XX date as a reminder of my “why.”

6. Intellectual Wellness

Focus: curiosity, learning, growth mindset

30. Commit to **one non-job-related learning experience** (podcast, class, hobby, lecture) per month to broaden perspective and creativity.

31. Read or listen to at least **XX books or podcasts** this year on leadership, psychology, or XX topic of choice.

23. Attend one **cross-discipline workshop** (e.g., communication, psychology, negotiation) by XX date to enhance professional versatility.

24. Identify a **professional development goal outside my current specialty** and pursue one related training by XX date.

7. Environmental Wellness

Focus: physical workspace, surroundings, sustainability

- 25. Declutter and organize my workspace by XX date, removing items that contribute to stress or distraction.
 - 26. Add **one calming or uplifting element** (plant, art, quote) to my workspace by XX date to improve focus and morale.
 - 27. Take at least one **walking or outdoor break per workday**, logging progress for two months to establish habit.
 - 28. By XX date, participate in one **community or office sustainability initiative** (e.g., recycling drive, clean-up event).
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8. Financial Wellness

Focus: security, planning, stress reduction

- 29. Schedule or attend a **financial planning session or webinar** by XX date to review debt, savings, and retirement options.
- 30. Create a **monthly personal budget** and review adherence at the end of each month for three months.
- 31. Set up an **automatic savings contribution or retirement plan increase** (even small) by XX date.
- 32. Identify one **financial stressor** (e.g., student loans, emergency savings) and take one concrete step to address it by XX date.