

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.