



# Performance Evaluation Spreadsheet Process

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# Performance Evaluation Spreadsheet Process

- The Performance Evaluation Spreadsheet is a record of all 100, 200 and 300 Pay Plan Employees who receive performance evaluations
- These spreadsheets are populated with budgetary information for performance increase planning
- The spreadsheets calculate fund/org unit budget available, distribution of performance ratings, proposed salaries for employees and any applicable lump sum payments
- If there are any issues with populated data, please let us know as soon as you receive the spreadsheet



# Record Ratings on the Performance Evaluation Spreadsheet

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1		<b>Sec 1</b>	<b>Sample Business Unit</b>									<b>Sec 3</b>	<b>Performance Rating</b>	<b>Fixed Increase</b>	<b>Count</b>					
2			<b>Fund</b>	<b>1020</b>									0-Ineligible (Hire Date/Vacant)	0.0%	1					
3			Budgeted Salaries & Wages	680,000.00									1-Does not meet expectations	0.0%	0					
4			Proposed Increase (STEP)	#N/A									2-Needs Improvement	1.0%	0					
5			Proposed Increase (Performance)	#N/A									3-Meets expectations	3.0%	0					
6			Current Annual Salary	616,855.78									4-Exceeds expectations	5.0%	0					
7			<b>Budget Available (Short)</b>	<b>#N/A</b>									S0-Ineligible (Vacant)	0.0%	2					
8													S1-Does not meet expectations	0.0%	0					
9		<b>Sec 2</b>	Count, Exempt Positions	EXT	4								S2-Meets expectations	2.5%	0					
10			Count, Non-Exempt Positions	NXT	9								<b>Total</b>		<b>3</b>					
11					13															
12													<b>Sec 4</b>							
13	<b>Bus Unit</b>	<b>Fund#</b>	<b>Org</b>	<b>AppraisalType</b>	<b>Grade</b>	<b>Pmt Sch</b>	<b>Pos#</b>	<b>Pos. Entry Date</b>	<b>EE #</b>	<b>Name</b>	<b>PosDescr</b>	<b>Annual Sal</b>	<b>Rating</b>	<b>Prop%In cr</b>	<b>Prop\$Incr</b>	<b>NewAnnSal</b>	<b>LumpSum</b>	<b>Cross check</b>	<b>Minimum</b>	<b>Maximum</b>
14	SAM	1020	10001 Sample org 1	300 Supervisor	315	EXT	1	2/1/2021	123	Doe, John	Director of Sample Unit	115,000.000		#N/A	#N/A	#N/A	#N/A		112,783.840	184,810.555
15	SAM	1020	10001 Sample org 1	100 Non-Mgr	113	NXT	2	12/31/2018	234	Doe, Jane	Management Assistant	37,467.040		#N/A	#N/A	#N/A	#N/A		30,750.720	50,390.080
16	SAM	1020	10001 Sample org 1	300 Supervisor	312	EXT	3	4/1/2021	345	etc	Assitant Director of Sample Unit	97,500.000	0-Ineligible (Hire Date/Vacant)	0.0%	0.000	97,500.000	0.000		97,427.804	159,646.805
17	SAM	1020	10001 Sample org 1	200 Non-Mgr	204	EXT	4	8/13/2012	456	etc	Sr. Management Assistant	60,000.000		#N/A	#N/A	#N/A	#N/A		37,625.065	61,654.068
18	SAM	1020	10001 Sample org 1	100 Non-Mgr	113	NXT	5	1/6/2014	567	etc	Management Assistant	39,364.000		#N/A	#N/A	#N/A	#N/A		30,750.720	50,390.080
19	SAM	1020	10001 Sample org 1	100 Non-Mgr	110	NXT	6	8/26/2013	678	etc	Management Aide	27,909.440		#N/A	#N/A	#N/A	#N/A		26,563.680	43,528.160
20			<b>Total</b>									<b>377,240.480</b>			<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>
21			<b>Budget</b>															<b>380,000.000</b>		
22																				
23	SAM	1020	10002 Sample org 2	200 Supervisor	211	EXT	7	2/15/2021	789	Brown, Mary	Senior Project Manager	71,891.832		#N/A	#N/A	#N/A	#N/A		52,942.867	86,753.796
24	SAM	1020	10002 Sample org 2	100 Non-Mgr	204	NXT	8			Vacant	Sr. Management Assistant	27,625.065	S0-Ineligible (Vacant)	0.0%	0.000	27,625.065	0.000		37,625.065	61,654.068
25	SAM	1020	10002 Sample org 2	100 Non-Mgr	114	NXT	9	7/19/2021	134	etc	Program Specialist	47,933.600		#N/A	#N/A	#N/A	#N/A		32,289.920	52,908.960
26			<b>Total</b>									<b>147,450.497</b>			<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>
27			<b>Budget</b>															<b>175,000.000</b>		
28																				
29	SAM	1020	10003 Sample org 3	100 Non-Mgr	105	NXT	10	3/24/2015	346	etc	Bldg. & Grounds Custodian	24,741.600		#N/A	#N/A	#N/A	#N/A		20,814.560	34,105.760
30	SAM	1020	10003 Sample org 3	100 Non-Mgr	105	NXT	11	4/12/2021	467	etc	Bldg. & Grounds Custodian	24,741.600		#N/A	#N/A	#N/A	#N/A		20,814.560	34,105.760
31	SAM	1020	10003 Sample org 3	100 Non-Mgr	105	NXT	12	5/21/2019	792	etc	Bldg. & Grounds Custodian	21,867.040		#N/A	#N/A	#N/A	#N/A		20,814.560	34,105.760
32	SAM	1020	10003 Sample org 3	100 Non-Mgr	105	NXT	13			Vacant	Bldg. & Grounds Custodian	20,814.560	S0-Ineligible (Vacant)	0.0%	0.000	20,814.560	0.000		20,814.560	34,105.760
33			<b>Total</b>									<b>92,164.800</b>			<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>
34			<b>Budget</b>															<b>125,000.000</b>		
35																				
36			<b>Grand Total</b>									<b>616,855.777</b>			<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>	<b>#N/A</b>



# Record Ratings on the Performance Evaluation Spreadsheet

## Exempt Employees:

									Sec 4				
AppraisalType	Grade	Pmt Sch	Pos#	Pos. Entry Date	EE #	Name	PosDescr	Annual Sal	Rating	Prop%In cr	Prop\$Incr	NewAnnSal	LumpSum
300 Supervisor	315	EXT	1	2/1/2021	123	Doe, John	Director of Sample Unit	115,000.000		N/A	#N/A	#N/A	#N/A
100 Non-Mgr	113	NXT	2	12/31/2018	234	Doe, Jane	Management Assistant	37,467.040		N/A	#N/A	#N/A	#N/A
300 Supervisor	312	EXT	3	4/1/2021	345	etc	Assitant Director of Sample Unit	97,500.000	0-Ineligible (Hire Date/Vacant) 1-Does not meet expectations	0.0%	0.000	97,500.000	0.000
200 Non-Mgr	204	EXT	4	8/13/2012	456	etc	Sr. Management Assistant	60,000.000	2-Needs Improvement	N/A	#N/A	#N/A	#N/A
100 Non-Mgr	113	NXT	5	1/6/2014	567	etc	Management Assistant	39,364.000	3-Meets expectations	N/A	#N/A	#N/A	#N/A
100 Non-Mgr	110	NXT	6	8/26/2013	678	etc	Management Aide	27,909.440	4-Exceeds expectations	#N/A	#N/A	#N/A	#N/A
								377,240.480			#N/A	#N/A	#N/A

## Non-Exempt Employees:

AppraisalType	Grade	Pmt Sch	Pos#	Pos. Entry Date	EE #	Name	PosDescr	Annual Sal	Rating	Prop%In cr	Prop\$Incr	NewAnnSal	LumpSum	Cross check
300 Supervisor	315	EXT	1	2/1/2021	123	Doe, John	Director of Sample Unit	115,000.000	3-Meets expectations	3.0%	3,450.000	118,450.000	0.000	
100 Non-Mgr	113	NXT	2	12/31/2018	234	Doe, Jane	Management Assistant	37,467.040	S2-Meets expectations	2.5%	936.676	38,403.716	0.000	
300 Supervisor	312	EXT	3	4/1/2021	345	etc	Assitant Director of Sample Unit	97,500.000	0-Ineligible (Hire Date/Vacant)	0.0%	0.000	97,500.000	0.000	
200 Non-Mgr	204	EXT	4	8/13/2012	456	etc	Sr. Management Assistant	60,000.000	4-Exceeds expectations	5.0%	3,000.000	61,654.068	1,345.932	
100 Non-Mgr	113	NXT	5	1/6/2014	567	etc	Management Assistant	39,364.000		N/A	#N/A	#N/A	#N/A	
100 Non-Mgr	110	NXT	6	8/26/2013	678	etc	Management Aide	27,909.440	S0-Ineligible (Vacant) S1-Does not meet expectations	N/A	#N/A	#N/A	#N/A	
								377,240.480	S2-Meets expectations		#N/A	#N/A	#N/A	#N/A
													380,000.000	





# Record Ratings on the Performance Evaluation Spreadsheet

Bus Unit	Fund#	Org	AppraisalType	Grade	Pmt Sch	Pos#	Pos. Entry Date	EE #	Name	PosDescr	Annual Sal	Rating	Prop%In cr	Prop\$Incr	NewAnnSal	LumpSum	Cross check	Minimum	Maximum		
Sec 1 Sample Business Unit												Sec 3		Performance Rating		Fixed Increase	Count				
Fund			1020			0-Ineligible (Hire Date/Vacant)		0.0%	1												
Budgeted Salaries & Wages			680,000.00			1-Does not meet expectations		0.0%	0												
Proposed Increase (STEP)			5,600.61			2-Needs Improvement		1.0%	0												
Proposed Increase (Performance)			8,606.75			3-Meets expectations		3.0%	2												
Current Annual Salary			616,855.78			4-Exceeds expectations		5.0%	1												
Budget Available (Short)			48,936.86			S0-Ineligible (Vacant)		0.0%	2												
						S1-Does not meet expectations		0.0%	0												
Sec 2			Count, Exempt Positions			EXT	4			S2-Meets expectations		2.5%	7								
			Count, Non-Exempt Positions			NXT	9			Total			13								
							13														
												Sec 4									
SAM	1020	10001 Sample org 1	300 Supervisor	315	EXT	1	2/1/2021	123	Doe, John	Director of Sample Unit	115,000.000	3-Meets expectations	3.0%	3,450.000	118,450.000	0.000		112,783.840	184,810.555		
SAM	1020	10001 Sample org 1	100 Non-Mgr	113	NXT	2	12/31/2018	234	Doe, Jane	Management Assistant	37,467.040	S2-Meets expectations	2.5%	936.676	38,403.716	0.000		30,750.720	50,390.080		
SAM	1020	10001 Sample org 1	300 Supervisor	312	EXT	3	4/1/2021	345	etc	Assitant Director of Sample Unit	97,500.000	0-Ineligible (Hire Date/Vacant)	0.0%	0.000	97,500.000	0.000		97,427.804	159,646.805		
SAM	1020	10001 Sample org 1	200 Non-Mgr	204	EXT	4	8/13/2012	456	etc	Sr. Management Assistant	60,000.000	4-Exceeds expectations	5.0%	3,000.000	61,654.068	1,345.932		37,625.065	61,654.068		
SAM	1020	10001 Sample org 1	100 Non-Mgr	113	NXT	5	1/6/2014	567	etc	Management Assistant	39,364.000	S2-Meets expectations	2.5%	984.100	40,348.100	0.000		30,750.720	50,390.080		
SAM	1020	10001 Sample org 1	100 Non-Mgr	110	NXT	6	8/26/2013	678	etc	Management Aide	27,909.440	S2-Meets expectations	2.5%	697.736	28,607.176	0.000		26,563.680	43,528.160		
Total											377,240.480			9,068.512	384,963.060	1,345.932	(386,308.992)				
Budget																	380,000.000				
SAM	1020	10002 Sample org 2	200 Supervisor	211	EXT	7	2/15/2021	789	Brown, Mary	Senior Project Manager	71,891.832	3-Meets expectations	3.0%	2,156.755	74,048.587	0.000		52,942.867	86,753.796		
SAM	1020	10002 Sample org 2	100 Non-Mgr	204	NXT	8			Vacant	Sr. Management Assistant	27,625.065	S0-Ineligible (Vacant)	0.0%	0.000	27,625.065	0.000		37,625.065	61,654.068		
SAM	1020	10002 Sample org 2	100 Non-Mgr	114	NXT	9	7/19/2021	134	Garcia, John	Program Specialist	47,933.600	S2-Meets expectations	2.5%	1,198.340	49,131.940	0.000		32,289.920	52,908.960		
Total											147,450.497			3,355.095	150,805.592	0.000	(150,805.592)				
Budget																	175,000.000				
SAM	1020	10003 Sample org 3	100 Non-Mgr	105	NXT	10	3/24/2015	346	etc	Bldg. & Grounds Custodian	24,741.600	S2-Meets expectations	2.5%	618.540	25,360.140	0.000		20,814.560	34,105.760		
SAM	1020	10003 Sample org 3	100 Non-Mgr	105	NXT	11	4/12/2021	467	etc	Bldg. & Grounds Custodian	24,741.600	S2-Meets expectations	2.5%	618.540	25,360.140	0.000		20,814.560	34,105.760		
SAM	1020	10003 Sample org 3	100 Non-Mgr	105	NXT	12	5/21/2019	792	etc	Bldg. & Grounds Custodian	21,867.040	S2-Meets expectations	2.5%	546.676	22,413.716	0.000		20,814.560	34,105.760		
SAM	1020	10003 Sample org 3	100 Non-Mgr	105	NXT	13			Vacant	Bldg. & Grounds Custodian	20,814.560	S0-Ineligible (Vacant)	0.0%	0.000	20,814.560	0.000		20,814.560	34,105.760		
Total											92,164.800			1,783.756	93,948.556	0.000	(93,948.556)				
Budget																	125,000.000				
Grand Total											616,855.777			14,207.363	629,717.208	1,345.932	48,936.860				



# Performance Evaluation Spreadsheet Timeline

2021

October

Questions? Contact the Compensation Team at [compensation@cctexas.com](mailto:compensation@cctexas.com)

Extension 5054

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
17	18	19	20	21	22	23
Directors receive Performance Spreadsheets from <a href="mailto:compensation@cctexas.com">compensation@cctexas.com</a>						

November

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
Performance Spreadsheets due back to <a href="mailto:compensation@cctexas.com">compensation@cctexas.com</a>						

December

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
5	6	7	8	9	10	11
F12s for 200s merit increases due to <a href="mailto:compensation@cctexas.com">compensation@cctexas.com</a>						