SPDG Program:
ALN 84.323A
FY26 APR Support

January 27, 2026

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Purpose

▶ The purpose of today's webinar is to:

- Provide guidance on how to complete the Annual Performance Report (APR).

- Provide guidance on how to develop project and program measures.

- Share resources to support the development of your APR.

- Answer any questions that may arise.

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Purpose of the Annual Performance Report

- Provides an annual report of your performance on (a) meeting the approved objectives of the project, and (b) financial management of federal funds

- Required for all active grants, including those in no cost extension (NCE)

- Used by OSEP to determine if substantial progress has been made to continue funding or an NCE.

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Annual Performance Report (APR)

- Cover Sheet
  - ➤ Make sure certifying official is the person who signs the APR cover sheet. Digital signature is needed for the APR to be valid.

- Executive Summary

- Project Status Charts (Section A)

- Budget Information (Section B)
  - Budget Sheet

- Additional Information (Section C)

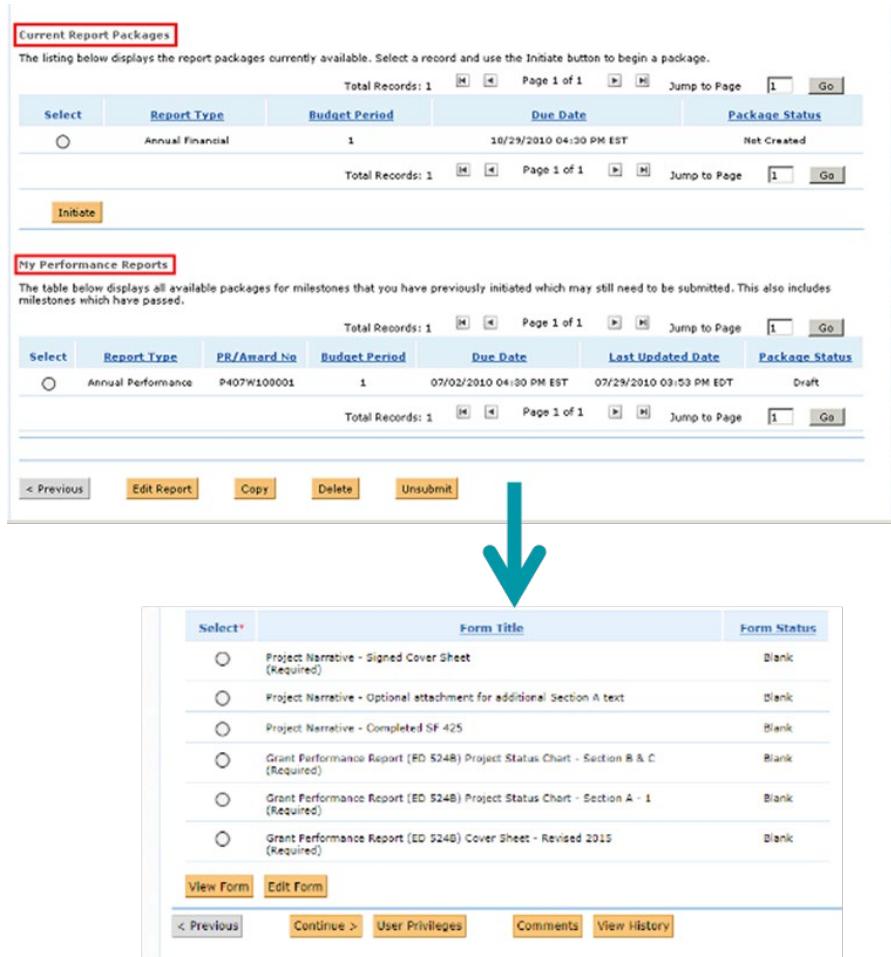- Due date: 4:30 pm ET on Friday, May 1, 2026

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Starting an APR in G5

- After you've logged into G5, click the **Package Submission** menu item (under the **Grant Maintenance Menu**) to begin the process of completing and submitting an electronic performance report.

- Select your award number and click "Continue"

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- If you're just getting started on this year's APR, look for an APR Package under **Current Report Packages**. Select it and click **Initiate**.

- If you've already started working on the APR and are coming back to G5 to continue editing, look for your APR Report under **My Performance Reports**. Select it and click **Edit Report**.

- A list of the forms that makeup your APR will be displayed for you to select and view or edit.

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ED 524B
Cover Sheet

- Pause and review cover sheet example.

- Signature process is difficult. Has anyone figured out a hack>

Filling out the ED 524B Cover Sheet

▶ For projects in their first year, the Reporting Period (Question 7) is your start date (probably October 1, 2025) through February 28, 2026.

▶ For projects in year two or later, the Reporting Period (Question 7) is March 1, 2025, to February 28, 2026.

▶ When reporting budget expenditures on the Cover Sheet (Question 8) and in Section B of the Status Sheet, describe funds expended during the Budget Period (October 1, 2025, through your most current calculations as of the time you completing the report) rather than during the Reporting Period.

- Must fill out 9a, 9b, 9e

- 9a: "Yes" – Claiming indirect costs

- 9b: Report your indirect cost rate.

- 9e: Check that you are using the unrestricted indirect cost rate.

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▶ **Questions 10 and 11:** NA

▶ **Question 12:** Following the <u>general instructions for ED 524B</u> forms, indicate that complete data have not yet been included. Indicate the due date of your project's final report (90 days after grant ends) as the date when data will be available and submitted to the Department.

▶ Before Submitting the APR, ensure that the Cover Sheet is signed by your Authorized Representative.

- Obtain a verifiable, digital signature on a PDF, or

- Print a copy, have it signed, then scan and save.

- The cover sheet signature may take several days or more to obtain, depending on your institution. Ensure that you start the process in time to meet the reporting deadline.

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ED 524B Executive Summary

- The Executive Summary for Annual Performance Reports is a one-or-two-page narrative summary of accomplishments during the current reporting period.
- Refer to the <u>general instructions</u> and Dear Colleague Letter for what to include in your executive summary.
- Prepare your Executive Summary in Word, then save it as a PDF to be uploaded in G5.
- Do not submit your project abstract in this section.

Please include:
- highlights of accomplishments and progress toward your project's goals and objectives that occurred during this reporting period.
- contributions the project has made to knowledge, practice, and/or local policies or systems, if applicable.
- descriptions of the populations served.

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▶ Enter the requested information into the G5 fields.

▶ These fields match the PDF version of the ED 524B Cover Sheet that has been shared as an example.

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At the bottom of the screen, there are fields for uploading your **Executive Summary**.

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▶ Once completed, save and return to the package

▶ Select Grant Performance Report (ED 524B) Cover Sheet

▶ Select View Form for the option to print or download a completed form for signature.

▶ A PDF copy (with scanned, ink signature or digital signature) should be uploaded under "Project Narrative - Signed Cover Sheet"

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ED 524B (Section A) Status Charts

- We have multiple exemplar reports on the SIGnetwork website on the APR and Program Measure page.

- There are exemplars of new projects' APRs and ongoing projects' APRs.

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▶ Section A of the APR

▶ Where grantees report progress toward meeting project objectives

▶ Should include program and project measures

▶ Progress on meeting each project measure is updated annually

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▶ **SPDG PROGRAM Goals:** These are integrated into the Program Measures: To provide effective PD, improve the ability of personnel to use evidence-based practices, and in turn to improve outcomes of children with disabilities.

▶ **PROJECT Objectives:** What your grant project proposed to do to accomplish the goals of OSEP's SPDG Program(refer to your application).

▶ **Performance Measures:** How you measure progress toward meeting those objectives

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▶ **GPRA / PROGRAM Performance Measures**
Program measures established for reporting to Congress under the Government Performance and Results Modernization Act (GPRA).

▶ **PROJECT Performance Measures**
Project-specific performance measures

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▶ Ensure that your measures have the level of specificity needed to outline important details about changes that are expected to occur as a result of project implementation.

▶ Use action-oriented terms such as increase, decrease, or improve.

- What is being measured?

- Who will achieve the change?

- How much change is expected?

- When will the change take place?

- How will it be measured?

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Measure 1 – Evidence-Based Practices in Professional Development: Projects use evidence-based professional development practices to support the attainment of identified competencies.

Measure 2 – Implementation Improvement: Participants in SPDG professional development demonstrate improvement in implementation of SPDG-supported practices over time.

Note: This is a report of fidelity of an intervention that impacts the child outcome reported in Program Measure 4.

Measure 3 – Sustaining SPDG-supported Practices: Projects use SPDG professional development funds to provide follow-up activities designed to sustain the use of SPDG-supported practices.

Measure 4 – Child Outcomes: Projects improve outcomes for children with disabilities.
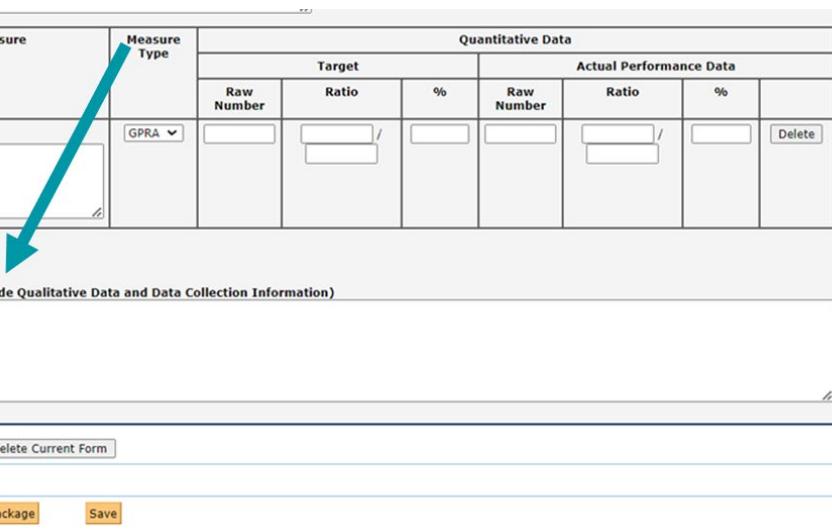
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► Under each status chart is a space to provide further explanation, including qualitative data which doesn't easily fit into the chart as well as information about how your quantitative data were collected and analyzed.

► Note the directions re the data information you should provide.

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- Use **Add Performance Measure** to add as many measures as needed for each objective. Use **Add Another Project Objective** to add more objectives.

- Be aware! There are character limits and required fields.
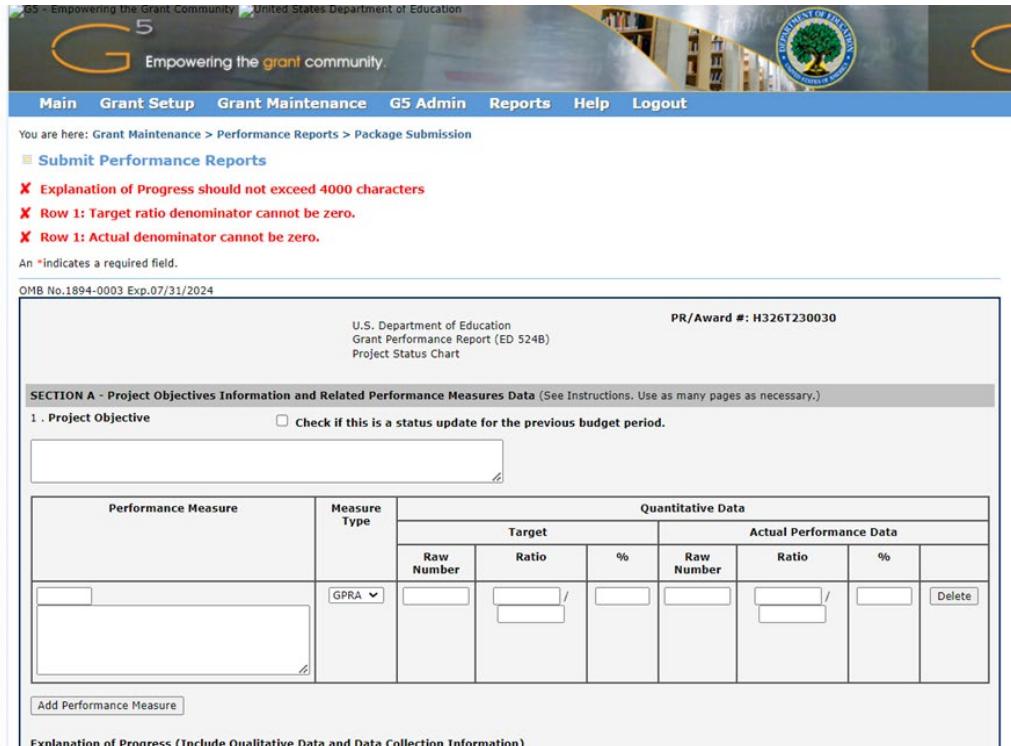
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▶ Save frequently!

▶ If you are unable to save, scroll up to see error messages in red font.

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▶ Describe any significant changes to your budget resulting from modification of project activities.

▶ Describe any changes to your budget that affected your ability to achieve your approved project activities and/or project objectives.

▶ **If you expect to have any unexpended funds at the end of the current budget period, explain why, provide an estimate, and indicate how you plan to use the unexpended funds (carryover) in the next budget period.**

▶ Describe any anticipated changes in your budget for the next budget period.

SECTION B – Budget Information; *continued-*

EXAMPLE: Table* of Expenditures

	Amount Available Current Year FY 20xx (Year 1)	Amount Expended in Reporting Period (by 2/29/2021)	Amount Encumbered to be Expended by end of Budget Year (9/30/202X)	Expected Unexpended Funds (for Carryover)	Comments
Personnel					
Fringe Benefits					
Travel					
Equipment					
Supplies					
Contractual					
Other					
Indirect Costs					
Scholar Support Expenditures					
Total Costs					

NOTE: *Include a separate table for reporting non-federal grant funds (cost/matching), if applicable.

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Fiscal Responsibility

▶ The Department expects annual grant funds to be expended within each 12-month budget period.

▶ Carryover of Federal funds will be reviewed carefully by ED staff

▶ Excessive carryover funds may result in a reduction of continuation funds in the subsequent budget period.

▶ Grantees must have a detailed plan for how to use funds going into the next budget period

▶ If you are identified as a grantee with large available balances, be prepared to provide additional budget information to your project office, including:

  ➢ Brief explanation of the factor(s) leading to a LAB, including other unforeseeable complications(e.g. natural disaster, recruitment challenges, etc.).

  ➢ Brief explanation of the grantee's proposed plan for resolving the LAB over the remaining budget period for the grant; including both the project activities and corresponding amount of federal funds used for each of those activities.

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The current balance in G5 is $585, 000. We will draw down $60,000 for coaches' salaries and $70,000 for training costs before the end of August 2026 which will result in approximately $455,000 remaining. Before the end of September, we will draw down additional funds for administrative costs in the amount of $40,000. This will leave a balance of $415,000 by the end of the budget period on 09/30/2026. Once we hold our in-person conference in the Fall 2026, the project should no longer experience a large available balance.

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OSEP Resources

- [Grantee Guide to Project Performance Measurement](#), Center to Improve Program and Project Performance (CIPP)

- [Making Project Measures Meaningful: Quality, Relevance, Usefulness, and Beyond!](#) Center to Improve Program and Project Performance (CIPP)

- [SIGnetwork Information and Resources](#)

- [Administering ED Grants: A Risk-based Approach to Ensuring Successful Project Outcomes](#)

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Next Steps

- Ask your project officer for feedback on your performance measure/APR draft.
  - For ongoing grants this is due April 15th.
  - For new grants this is due to your PO ASAP.

- Office Hours will be available for additional Support

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