

**SPDG PROGRAM:
ALN 84.323A**

FY26 APR SUPPORT

JANUARY 27, 2026

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.

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.

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

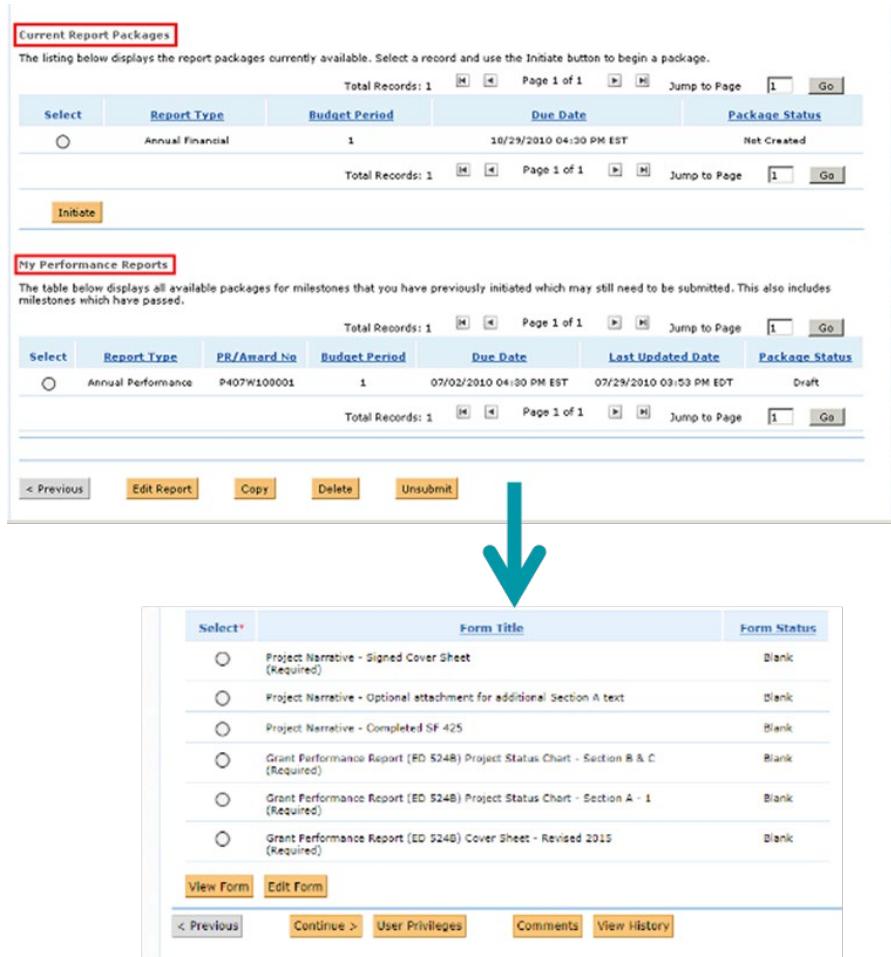
Starting an APR in G5



- 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"



Starting the APR in G5 (cont'd)



The screenshot shows the G5 APR interface. At the top, there are two sections: 'Current Report Packages' and 'My Performance Reports'. The 'Current Report Packages' section shows a single record for 'Annual Financial' with a due date of 10/29/2010 04:30 PM EST and a status of 'Net Created'. The 'My Performance Reports' section shows a single record for 'Annual Performance' with a PR/Award No of P407W100001, a due date of 07/02/2010 04:30 PM EST, and a last updated date of 07/29/2010 03:53 PM EDT, with a status of 'Draft'. Below these sections are buttons for 'Initiate', 'Edit Report', 'Copy', 'Delete', and 'Unsubmit'. A large blue arrow points downwards from the top sections to a list of forms below. The list is titled 'Form Title' and includes the following items:

Form Title	Form Status
Project Narrative - Signed Cover Sheet (Required)	Blank
Project Narrative - Optional attachment for additional Section A text	Blank
Project Narrative - Completed SF 425	Blank
Grant Performance Report (ED 524B) Project Status Chart - Section B & C (Required)	Blank
Grant Performance Report (ED 524B) Project Status Chart - Section A - 1 (Required)	Blank
Grant Performance Report (ED 524B) Cover Sheet - Revised 2015 (Required)	Blank

At the bottom of the list are buttons for 'View Form' and 'Edit Form', along with navigation buttons for '< Previous', 'Continue >', 'User Privileges', 'Comments', and 'View History'.

- ▶ 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.

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.

Cover Sheet - Indirect Cost Information

- 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.

ED 524B Cover Sheet: Questions 10-12 & Signature

- ▶ **Questions 10 and 11:** NA
- ▶ **Question 12:** Following the general instructions for ED 524B 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.

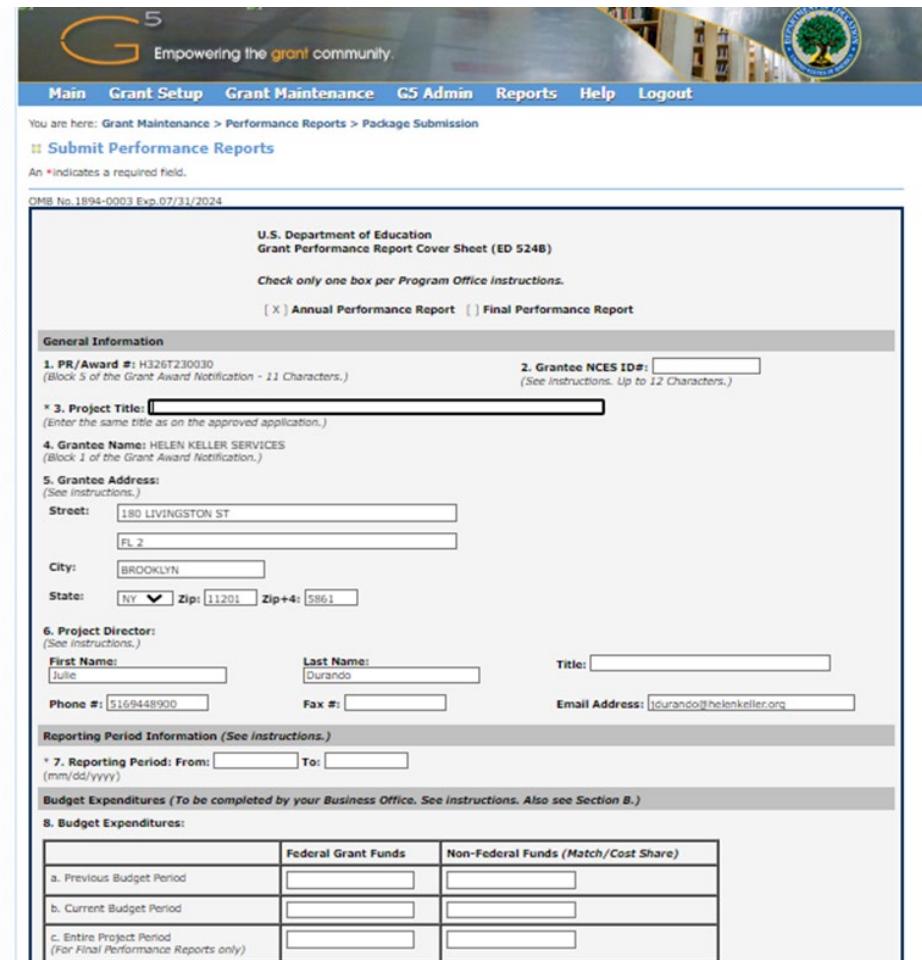
ED 524B Executive Summary

- ▶ 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 general instructions 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.

Completing the Cover Sheet in G5 (slide 1 of 3)



The screenshot shows the G5 software interface for grant maintenance. The top navigation bar includes Main, Grant Setup, Grant Maintenance, G5 Admin, Reports, Help, and Logout. The sub-navigation bar shows the user is in 'Grant Maintenance > Performance Reports > Package Submission'. A 'Submit Performance Reports' button is highlighted. The main content area is titled 'U.S. Department of Education Grant Performance Report Cover Sheet (ED 524B)'. It includes instructions to 'Check only one box per Program Office Instructions.' and two radio button options: '[X] Annual Performance Report' and '[] Final Performance Report'. The form is divided into sections: 'General Information' (with fields for PR/Award #, Grantee NCES ID#, Project Title, Grantee Name, Address, and Contact Information), 'Project Director' (with fields for First Name, Last Name, Title, Phone, Fax, and Email), 'Reporting Period Information' (with a reporting period date range field), and 'Budget Expenditures' (with three rows for Previous Budget Period, Current Budget Period, and Entire Project Period, each with fields for Federal Grant Funds and Non-Federal Funds). The URL at the bottom is 'OMB No. 1894-0003 Exp. 07/31/2024'.

- ▶ 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.

Completing the Cover Sheet in G5 (slide 2 of 3)

Indirect Cost Information (To be completed by your Business Office. See instructions.)

* 9. Indirect Costs (Click button to clear and re-enter data.)

a. Are you claiming indirect costs under this grant?
If yes, please indicate which of the following applies to your grant?
 Yes No

b. The grantee has an Indirect Cost Rate Agreement approved by the Federal Government:
 Yes No

The period covered by the Indirect Cost Rate Agreement is : From: To: (mm/dd/yyyy)

The approving Federal agency is : ED Other (Please specify):

The Indirect Cost Rate is : %

Type of Rate (For Final Performance Reports Only) : Provisional Final Other (Please specify):

c. The grantee is not a State, local government, or Indian tribe, and is using the de minimis rate of 10% of modified total direct costs (MTDC) in compliance with 2 CFR 200.414(f)
 Yes No

d. The grantee is funded under a Restricted Rate Program and is using a restricted indirect cost rate that either:
 Is included in your approved Indirect Cost Rate Agreement Complies with 34 CFR 76.564(c)(2)

e. The grantee is funded under a Training Rate Program and:
 Is recovering indirect cost using 8 percent of MTDC in compliance with 34 CFR 75.562(c)(2) Is recovering indirect costs using its actual negotiated indirect cost rate reflected in 9(b)

Human Subjects (Annual Institutional Review Board (IRB) Certification) (See instructions.)

* 10. Is the annual certification of Institutional Review Board (IRB) approval attached?
 Yes No N/A

Data Privacy and Security Measures Certification (See instructions.)

* 11. Is a statement affirming that you are aware of federal and state data security and student privacy regulations included, with supporting documentation attached?
 Yes No N/A

Performance Measures Status and Certification (See instructions.)

* 12. Performance Measures Status

a. Are complete data on performance measures for the current budget period included in the Project Status Chart?
 Yes No

b. If no, when will the data be available and submitted to the Department? (mm/dd/yyyy)

13. By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate and the expenditures, disbursements, and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I also swear that my family, fictitious, or fraudulent information is not used in this report and that any information contained in this report is not used for any other purpose than the reporting of these claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-33812). Furthermore, to the best of my knowledge and belief, all data in this performance report are true, complete, and correct and the report fully discloses all known weaknesses concerning the accuracy, reliability, and completeness of data reported.

This section should be completed on the Report Submission page by a user who is authorized to submit on behalf of an Authorized Representative.

Grant Performance Report (ED 524B) Executive Summary Attachment:

Title: File: Only Adobe Portable Document Format (.pdf) file upload is supported.

Form Complete

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

Completing the Cover Sheet in G5 (slide 3 of 3)

- ▶ 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”

The screenshot shows the G5 grant maintenance system interface. At the top, there's a banner with the text "G5 Empowering the grant community." and the U.S. Department of Education logo. Below the banner, the navigation menu includes Main, Grant Setup, Grant Maintenance, G5 Admin, Reports, Help, and Logout. The current page is "Submit Performance Reports" under "Package Information". A green success message states, "The Package has been initiated successfully. You may now continue with package submission." The main content area shows package details: Package Title (OSPP FY 2023 Grant Performance Report), CFDA/Subprogram (84.026T - 1), Due Date (03/03/2024 04:30 PM Washington DC Time), Fiscal Year (2023), Last Updated (02/23/2024 12:41:31 PM Washington DC Time). To the right, there's a "Package Information" section with details: Package Type (Annual Performance), Project Award No. (H32012230030), Budget Period (1), and Contact Name (Justin Hampton, with an email link). Below these are sections for "Documents & Instructions" and "Form Status". A table lists forms with their titles and statuses: Project Narrative - Signed Cover Sheet (Blank), Project Narrative - Optional attachment for additional Section A text (Blank), Project Narrative - Completed SF 425 (Blank), Grant Performance Report (ED 524B) Project Status Chart - Section B & C (Required) (Blank), Grant Performance Report (ED 524B) Project Status Chart - Section A - 1 (Required) (Blank), and Grant Performance Report (ED 524B) Cover Sheet - Revised 2015 (Required) (Blank). At the bottom, there are buttons for "View Form" and "Edit Form", and links for "Continue", "User Privileges", "Comments", and "View History".

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.



Project Status Chart

- ▶ 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

GOAL – OBJECTIVES - MEASURES

- ▶ **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

PERFORMANCE MEASURES

► **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

Developing Strong Performance Measures

- ▶ 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?

SPDG PROGRAM MEASURES

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

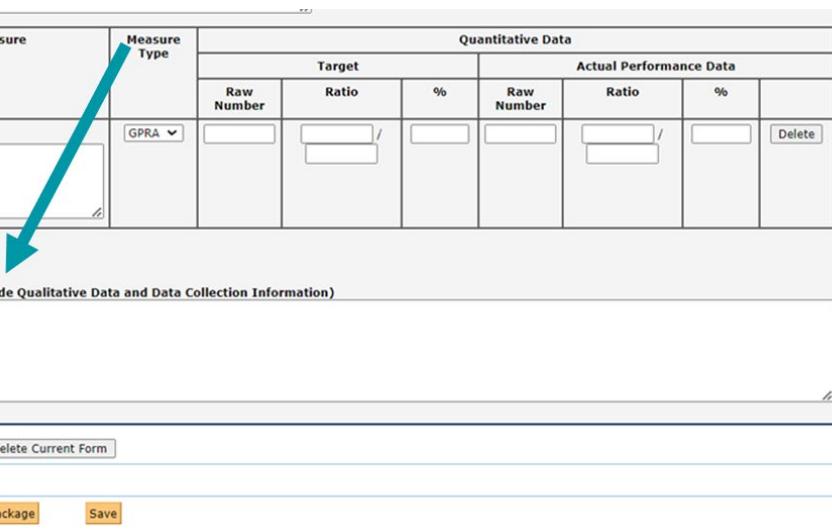
Measure 2 – Implementation Improvement: Participants in SPDG professional development demonstrate improvement in implementation of SPDG-supported practices over time.

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.

Status Charts: Explanation of Progress



The screenshot shows a software application window. At the top, there is a table for 'Performance Measure' and 'Measure Type'. Below this is a section titled 'Quantitative Data' with sub-sections for 'Target' and 'Actual Performance Data'. The 'Actual Performance Data' section includes columns for 'Raw Number', 'Ratio', and '%'. At the bottom of the window, there is a large text area labeled 'Explanation of Progress (Include Qualitative Data and Data Collection Information)'. Below this area are buttons for 'Add Another Project Objective', 'Delete Current Form', 'Form Complete', 'Cancel', 'Save & Return to Package', and 'Save'.

- ▶ 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.

Completing the Status Charts in G5

You are here: Grant Maintenance > Performance Reports > Package Submission

Submit Performance Reports

An * indicates a required field.

OMB No.1894-0003 Exp.07/31/2024

U.S. Department of Education PR/Award #: H326T230030
Grant Performance Report (ED 524B)
Project Status Chart

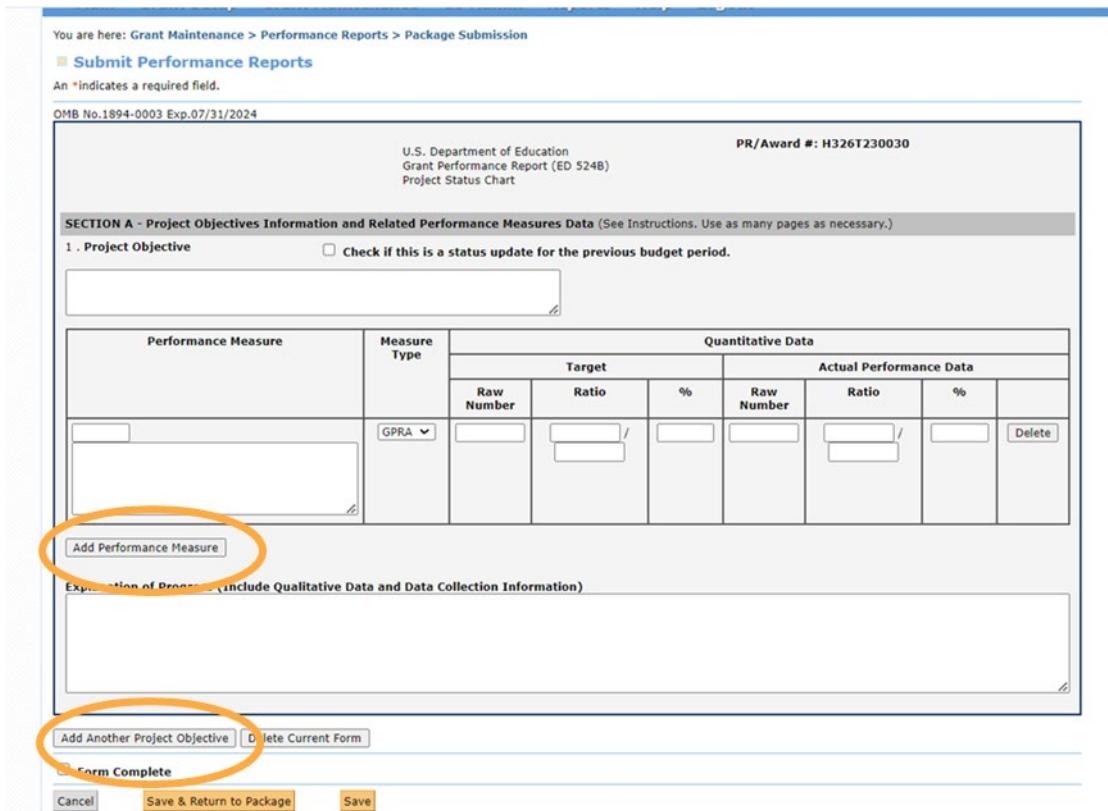
SECTION A - Project Objectives Information and Related Performance Measures Data (See Instructions. Use as many pages as necessary.)

1 . Project Objective Check if this is a status update for the previous budget period.

Performance Measure	Measure Type	Quantitative Data					
		Target			Actual Performance Data		
Raw Number	Ratio	%	Raw Number	Ratio	%	<input type="button" value="Delete"/>	
<input type="text"/>	<input type="button" value="Delete"/>						

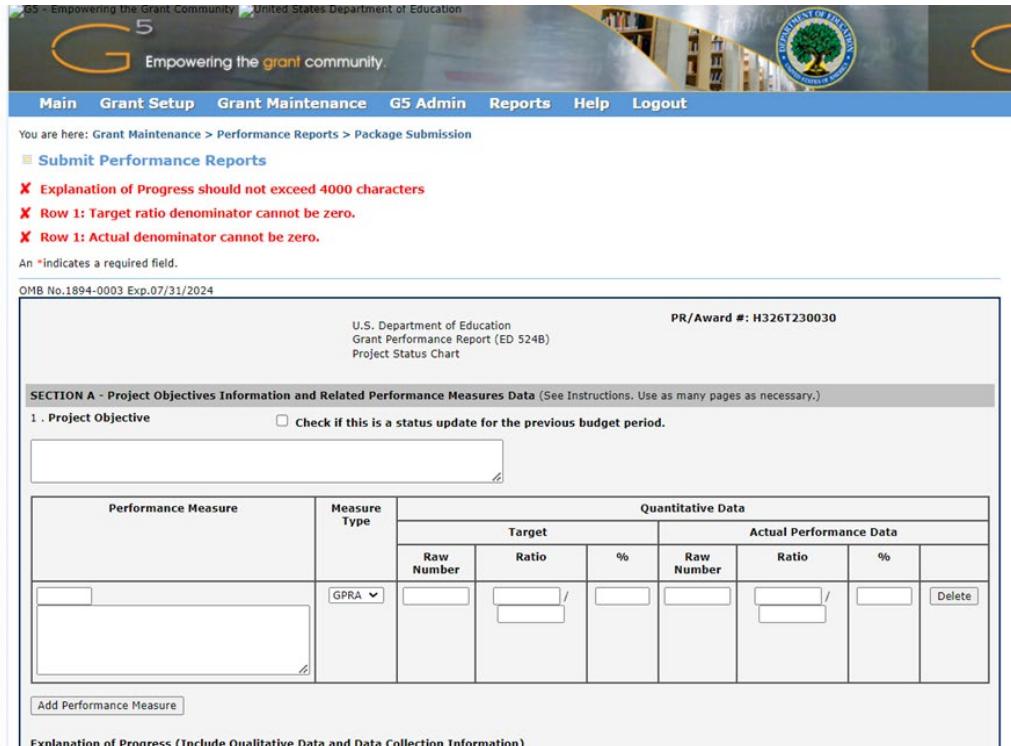
Explanation of Project (Include Qualitative Data and Data Collection Information)

Form Complete



- ▶ 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.

Completing the Status Charts in G5, cont'd



The screenshot shows the G5 Project Status Chart page. At the top, there are error messages in red: "X Explanation of Progress should not exceed 4000 characters", "X Row 1: Target ratio denominator cannot be zero.", and "X Row 1: Actual denominator cannot be zero.". Below this, there is a table for "Quantitative Data" with columns for Target, Actual Performance Data, and Delete. The "Measure Type" dropdown is set to "GPRA". At the bottom, there is a text area for "Explanation of Progress (Include Qualitative Data and Data Collection Information)".

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



Section B- Budget Information

- ▶ 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.

Recommended Budget Table for Section B

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 <u>Expended</u> 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.

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.

Section B – Example Summary Statement

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.

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

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