



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES

January 15, 2026

Dear Colleague:

In accordance with the Education Department General Administrative Regulations (EDGAR), 34 CFR 75.253, recipients of multi-year discretionary grants must submit an annual grant performance report demonstrating substantial progress towards meeting project objectives. In addition, the U.S. Department of Education (ED) requires discretionary grantees to report on their progress towards meeting the performance measures established for each program within the Office of Special Education Programs (OSEP). **Personnel Development to Improve Services and Results for Children with Disabilities Program (ALN 84.325) (PDP) grantees** must submit an annual grant performance report to ED by 4:30 p.m. ET on Friday, May 1, 2026. For grantees who will submit a final performance report prior to December 31, 2026, you are not required to submit an annual performance report by May 1, 2026.

ED requires that grantees use the [ED 524B](#) form when submitting their annual grant performance report. If you would like to learn more about the annual performance report and measurement, OSEP provides a pre-recorded webinar and other resources on this topic at [Grantee Guide to Project Performance Measurement Webinar](#). The OSEP-funded Center to Improve Program and Project Performance (CIPP) developed the [Grantee Guide to Project Performance Measurement](#) to help projects develop high-quality project performance measures. The guide outlines a five-step process for developing measures and includes templates to assist projects at each step of development.

The ED 524B Form

The ED 524B form consists of five sections. With limited exceptions, described within this letter, you must report all requested information in the appropriate sections, according to the [Instructions for Grant Performance Report](#). Below are some clarifications, modifications, and additions to the instructions to enhance consistency of reporting across all OSEP grants.

Cover Sheet

- The reporting period [see item 7 of the Cover Sheet] is from March 1, 2025, through February 28, 2026.
- **For those grantees in their first budget period**, please carefully read the special instructions (included in the instructions for Section A of the Project Status Chart) regarding collecting and reporting baseline data for performance measures and establishing and reporting on targets for meeting the performance measures. The reporting period [see item 7 of the Cover Sheet] is from the start of your current budget period through February 28, 2026.
- Your business office must complete all financial data, including budget expenditure data and indirect cost information. Please forward the ED 524B instructions to that office and allow sufficient time for them to provide you with the financial information.

- Item 9 asks for information about indirect cost rates. Additional indirect cost rate information for [training grants \(PDF\)](#) or grants under [restricted rate programs \(PDF\)](#) can be accessed at the links provided.
- For Item 11, mark N/A. This does not apply to OSEP’s discretionary grant programs.
- For Item 12a, you must indicate whether complete data on performance measures for the current budget period is included with your performance report. **Because your annual grant performance report is due before your project is complete, please check “No.”**
- For Item 12b, please indicate when the complete data (Final Report) will be available and submitted to ED (i.e., the date should be within 90 calendar days following the end of the project performance period).

Executive Summary (page 3 of Cover Sheet)

- The Executive Summary should be included in your report immediately after the Cover Sheet and prior to the Project Status Chart. The Executive Summary is a narrative summary of the project’s accomplishments during the reporting period.
- Please do not submit your project abstract in this section.
- For projects funded under scholar training grants (325D, 325H, 325K, 325M, and 325R), the Executive Summary should include a description of:
 - Strategies used to attract and retain scholars;
 - Approaches being used to build scholars’ competencies during preparation, including courses, group assignments, coordinated field experiences, and research and leadership opportunities; and
 - Evaluation of scholars’ knowledge and skills to provide effective evidence-based instruction, interventions, and services that improve outcomes for children with disabilities, such as literacy and math outcomes;
 - Strategies used to customize scholar support based on scholars’ individual needs.

Section A - [Project Status Chart](#)

- In Section A of the Project Status Chart, you are asked to report the progress made towards meeting your approved project objectives in your grant application. Under each objective, you should report performance measures, which are to be categorized as either PROGRAM or PROJECT performance measures. OSEP PROGRAM performance measures are the Government Performance and Results Act (GPRA) program measures (listed below). PROJECT performance measures are specific to your grant and show the progress that you are making towards meeting the project objectives. The resources referenced on page 1, paragraph 2 of this letter provide specific guidance on how to write and report data on your program and project measures.

- When reporting on quantitative performance measures, you are required to report on the targets (e.g., benchmarks or goals) that you established for each reporting period, as well as your actual performance data for that same period. If reporting percentages, also report ratio data for both targets and actual performance data. If you have not established targets, please consult with your Project Officer.

The OSEP **PROGRAM** performance measures for **Personnel Preparation Training Grants (325D, 325H, 325K, 325M, and 325R)** and **Leadership Development Programs (325L)** are:

- **Program Performance Measure #1:** The percentage of preparation programs that incorporate scientifically- or evidence-based practices into their curricula;
- **Program Performance Measure #2:** The percentage of scholars completing preparation programs who are knowledgeable and skilled in evidence-based practices for children with disabilities;
- **Program Performance Measure #3:** The percentage of scholars who exit preparation programs prior to completion due to poor academic performance;
- **Program Performance Measure #4:** The percentage of scholars completing preparation programs who are working in the area(s) in which they were prepared upon program completion;
- **Program Performance Measure #5:** The Federal cost per fully qualified scholar who completed the preparation program;
- **Program Performance Measure # 6:** The percentage of scholars who completed the preparation program and are employed in high-need districts; [Reporting excludes 325D and 325H scholars working as IHE faculty]; and
- **Program Performance Measure #7:** The percentage of scholars who completed the preparation program and who are rated effective by their employers.

OSEP is **piloting** a PROGRAM performance measure using outcome data reported by scholars who have completed their preparation program.

The PROGRAM Performance Measure being piloted by OSEP:

Outcome Measure #1: The percentage of scholars who completed the preparation program and are employed in the field of special education for at least two years.

For projects funded under the **325D, 325H, 325K, 325M, and 325R** grant programs, grantees also must complete the Annual Scholar Data Reporting at [OSEP PDPDCS \(ed.gov\)](https://ed.gov).

Specifically, grantees must -

- Enter and “submit” records for all newly enrolled scholars;
- Update records for currently enrolled scholars; and
- Exit scholars who have graduated or exited prior to completion.

This year the deadline for reporting scholar data into PDPDCS is Friday, March 28, 2026.

The OSEP PROGRAM performance measures for Associate Degree Preservice Program Improvement Grants to Support Personnel Working With Young Children With Disabilities (325N) are:

- **Program Performance Measure #1:** The percentage of preparation programs that incorporate scientifically based research or evidence-based practices (EBPs) into their curricula;
- **Program Performance Measure #2:** The percentage of scholars completing the preparation program who are knowledgeable and skilled in EBPs that improve outcomes for children with disabilities;
- **Program Performance Measure #3:** The percentage of scholars who exit the preparation program prior to completion due to poor academic performance; and
- **Program Performance Measure #4:** The percentage of scholars completing the preparation program who are working in the area(s) in which they were prepared upon program completion.

The OSEP PROGRAM performance measures for Improving Retention of Special Education Teachers and Early Intervention Personnel (325P) are:

- **Program Performance Measure #1:** Number and percent of special education teachers and early intervention service providers that participated in project-funded activities that are retained in their current position, or continuing to primarily serve children with disabilities in early intervention or school settings; and

- **Program Performance Measure #2:** Retention rate for special education teachers or EIS providers at the State, regional, or local system level that participated in project-funded activities compared to the historical retention of providers in the same State, regional, or local system(s) in years prior to participation in the proposed project.

The OSEP PROGRAM performance measures for **Preservice Improvement Enhancement Grants To Support Related Service Providers To Effectively Serve Children With Disabilities and Their Families (325S) and Preservice Program Development Grants at Historically Black Colleges and Universities, Tribally Controlled Colleges and Universities, and Other Minority Serving Institutions To Diversify Personnel Serving Children With Disabilities (325X)** are:

- **Program Performance Measure #1:** The percentage of preparation programs that incorporate scientifically based research or evidence-based practices (EBPs) into their curricula; and
- **Program Performance Measure #2:** The percentage of scholars completing the preparation program who will be knowledgeable and skilled in EBPs that improve outcomes for children with disabilities.

Section B – Budget Information (page 3 of [Project Status Chart](#))

- See [Instructions](#). In addition:
- Provide the amount and an explanation if any funds have been encumbered (spent) but have not yet been drawn down in G5 by September 30, 2026.
- Provide the expected amount of funds that will be carried over (not encumbered) into the next budget period.
- If you anticipate having carryover, provide an explanation of how you intend to use carryover funds in the next budget period.

Section C – Additional Information (page 3 of [Project Status Chart](#))

- See [Instructions](#). In addition:
- 325D and 325H grantees are required to report on “Scholar Accomplishments” during each reporting period. Scholar Accomplishments include, but are not limited to, publications, presentations, awards/honors, and courses taught. Additional instructions, examples, and formatting information will be sent separately.

- 325D, 325H, 325K, 325M, and 325R grantees are required to report:
 - Number of cohorts the grant is expected to train;
 - Number of scholars expected per cohort;
 - Total number of scholars expected to be trained over the entire grant period;
 - Number of scholars currently enrolled;
 - Number of scholars admitted for summer and fall of 2026; and
 - Number of scholars that have completed or will complete by the end of the summer 2026.

Submission

- Please review the attached Instructions for Submitting in G5 for information on submitting your annual grant performance report.
- Grantees must submit their report no later than **4:30 p.m. ET** on the due date.

Continuation Awards

Continuation awards for multi-year projects are subject to the requirements in 34 CFR 75.253 of EDGAR. Section 34 CFR 75.253(a)(1) of EDGAR requires the Department to determine whether the grantee:

- (1) has made substantial progress in meeting the objectives of its approved application, or
- (2) has not met substantial progress requirements; however, OSEP has approved changes that will enable the grantee to meet unmet objectives in succeeding budget periods prior to making a continuation award.

Large Available Balance

OSEP reviews data at least quarterly to determine if the grantee's rate of cash draws is consistent with the expected expenditure pattern for a project's approved scope of work and project milestones. The Department will apply scrutiny to grantees with large available balances, request additional budget information, and consider this information prior to making continuation award decisions.

The Department expects annual grant funds to be expended within each 12-month budget period. Grant activities should be completed, and budgets expended within their period of performance (most OSEP grants are 60 months in length). We have applied a formula to identify grants that may not expend their funds as expected this year. If your grant is at risk for having a large available balance, you will be notified by OSEP and asked to submit a statement addressing the large available balance. Your statement must describe in detail the amount of potential carryover funds, why the funds were not expended within the budget period, and your plan for expending those

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

Peer Reviewers for Grant Competitions

High-quality reviewers for OSEP's grant competitions are critical to the process of awarding grants to the most qualified applicants and ensuring that our programs are effective. Current grantees make excellent reviewers who are well versed in what it takes to apply for and administer an effective OSEP grant. We urge you to accept this opportunity to participate on a peer review panel when asked. While the monetary reward is not substantial, the experience is valuable and a vital public service to the field. Please find time to provide this important service. Contact your Project Officer for further information.

OSEP Leadership and Project Directors' Conference

OSEP will hold its annual OSEP Conference in-person from August 4-5, 2026 at the Crystal City Gateway Marriott Hotel, Arlington, VA. Additional information will be sent to all Project Directors via e-mail. Conference attendance is a condition of your grant award and is required of all grantees. More information coming soon!

The entire OSEP team extends its appreciation for your continued efforts to improve outcomes for infants, toddlers, children, and youth with disabilities and their families. If you have any questions about the content of your annual grant performance report for continuation funding, please reach out to your OSEP Project Officer. If you need technical assistance with G5 please reach out to Justin Hampton (Justin.Hampton@ed.gov).

Sincerely,

/s/

Christy Kavulic, Ed.D.

Director

Research to Practice Division

Office of Special Education Programs

Attachment: Instructions for Submitting in G5

Instructions for Submitting in G5

G5 is the Department's web-based portal for submission of all annual and final grant performance reports.

Annual and Final Performance Reports must be submitted via G5.

IMPORTANT: To utilize G5, you MUST first create a Login.gov account.

The following steps outline how to submit the reports in G5:

1. Access G5 at <https://www.g5.gov>.
2. Login to G5 using the two-factor authentication method you established in the system.
 - If this is the first time accessing G5, click on the “Sign Up” button below the login to establish an Email ID and Password.
 - Please note that registering with G5 is a three-step process: 1) Requesting an Account, 2) Activating Your Account, and 3) Identifying Yourself as a Project Director.
 - If you are the Project Director, you will need to add your name and Unique Entity Identifier as they appear on your last Grant Award Notification (GAN). If your name does not appear as the Project Director on your last GAN, you will need to contact your Project Officer before proceeding.
 - If you have forgotten your Email ID and/or Password, click on the appropriate button, either “Forgot Email ID” or “Forgot Password” and follow the on-screen instructions.
3. After logging in, hover over the “Grant Maintenance” drop down menu display. Then, hover over “Performance Reports” drop down menu display and click on “Package Submission.” Select the award for which you wish to complete a performance package and then click “Continue.”
4. You must select the performance report package you wish to complete and click “Initiate.” Please note that after the package has been initiated successfully, it will appear under “My Performance Reports.”

5. In order to begin filling out the forms, select a form and click “Edit Form.” Please note that you will want to continually save your work while completing the individual forms by clicking “Save” at the bottom of the screen; G5 times out after 20 minutes. You are strongly encouraged to develop your report in a separate document and cut and paste the contents to the relevant sections of the report.
6. Once you are ready to submit, click “Continue” followed by the “Submit” button to finalize your report submission.
7. After submitting the report, you must print a copy of the completed Grant Performance Report Cover Sheet (ED 524B), have the authorized representative sign the form, and attach a pdf copy of the *signed ED 524B Grant Performance Report Cover Sheet* to your annual performance report in G5.

If you have any problems while processing your grant performance report through G5, a G5 Help Desk staff member is available to assist you. The Help Desk can be reached by calling the following toll-free number: 1-888-336-8930 (TTY: 1-800-877-8339; Local: 202-401-6238).
Hours of operation: 8:00 a.m. – 6:00 p.m. ET, Monday - Friday.