



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). **Educational Technology, Media, and Materials (ETechM2) Program grantees** must submit an annual grant performance report to ED by 4:30 pm 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 performance measurement, OSEP provides a webinar and PowerPoint presentation 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 \(PDF\)](#). 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 read carefully 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

- 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.

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 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 you have not established targets, please consult with your Project Officer.

The OSEP **PROGRAM** performance measures for the **Educational Technology, Media, and Materials Program** are:

- **Program Performance Measure #1:** The percentage of Educational Technology, Media, and Materials Program products and services judged to be of high quality by an independent review panel of experts qualified to review the substantial content of the products and services.

- **Program Performance Measure #2:** The percentage of Educational Technology, Media, and Materials Program products and services judged to be of high relevance to improving outcomes for infants, toddlers, children, and youth with disabilities.
- **Program Performance Measure #3:** The percentage of Educational Technology, Media, and Materials Program products and services judged to be of useful in improving results for infants, toddler, children, and youth with disabilities.
- **Program Performance Measure #4.1:** The federal cost per unit of accessible educational materials funded by the Educational Technology, Media, and Materials Program.
- **Program Performance Measure #4.2:** The federal cost per unit of accessible educational materials from the National Instructional Materials Accessibility Center funded by the Educational Technology, Media, and Materials Program.
- **Program Performance Measure #4.3:** The federal cost per unit of video description funded by the Educational Technology, Media, and Materials Program.

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:
- Provide a **list of all new products** that were developed in the reporting period (indicated above), and a **list of all new services** that were rendered in the reporting period.
- A *product* is a piece of work, in text or electronic form, developed and disseminated by an OSEP-funded project to inform a specific audience on a topic relevant to the improvement of outcomes for children with disabilities. Examples of products include journal or informational articles, booklets, pamphlets (not marketing brochures about your project), manuals, multimedia kits or modules, and presentations. Examples of items that are not considered products include databases, websites, meeting agendas, materials developed for one time use by an individual, archived chat, conference proceedings, contact lists, progress/performance/continuation/evaluation reports.
- A *service* is work performed by an OSEP-funded project to provide information to a specific audience relevant to the improvement of outcomes for children with disabilities. Examples

of services include conducting training, providing captioning, video description, braille, or other accessible formatting of text or media, leading and convening informational meetings, responding to inquiries from a targeted population.

- Include a **list of milestones to be completed during the next reporting period** (between March 1 and February 28). These should be milestones you have agreed to through discussions with your Project Officer. “Milestone” is defined as a scheduled event signifying the completion of a major deliverable or set of deliverables or a phase of work. “Deliverable” is defined as a technical assistance and dissemination product or service.

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 pm 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 on August 4-5, 2026 at the Crystal 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

Attachments: Instructions for Submitting in G5
84.327S Stepping Up Technology Implementation Report

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.

84.327S Stepping Up Technology Implementation Report

Guidance on Documenting Implementation Processes and Dissemination Activities

Project Title:

Award #:

Person completing report:

Date:

Directions and Due Date: Complete this report and attach as a PDF file to the Annual Performance Report that is submitted in G5. If you have questions, contact your project officer.

Why: The purpose of this report is to describe the stage-based processes for how the project is implementing the technology tool/strategies and the evidence collected that support how the outcomes are meeting its intended population of users (e.g., teachers, early childhood providers, students, parents/families, or service providers.)

Data included in these reports are used by your Project Officer to support continuation recommendations. In addition, OSEP compiles the collective year 4 and year 5 data to support program evaluation. Congress uses program performance assessment data to justify program funding.

How: This report should reflect the culmination of efforts since the start of the grant. Completely answer the questions in each of the sections as it relates to your project year. As you complete this report, think of the document as a marketing tool for your project's accomplishments. Consider integrating charts, and tables to convey data collected and supports provided.

You may have information from previously submitted reports that you may copy into this document to continue the "story" of your implementation process. For example, year 4 projects may update and copy/paste Year 1-3 sections from previous years and complete the year 4 section.

- Exploration Stage (All 327S grants)
- Installation Stage (All 327S grants in year 2+)
- Initial Implementation Stage (All 327S grants in year 3+)
- Full Implementation/Outcomes Stage (All 327S grants in year 4+)
- Dissemination (All 327S grants in year 5 and 327S grants submitting a Final Report)
- Developed Products and Resources

Exploration Stage (All 327S grants)

This stage is designed to assure mutually informed agreement to proceed with use of an innovation; both the Implementation Team and the organization understand what is to be done, how it will be done, and the resources and timelines for doing it.

- a) Describe the process(es) for how readiness was assessed for the development and pilot school sites.
- b) Explain how the technology tool implemented was defined and operationalized for schools and the necessary supports (i.e., training and coaching) that were provided to district, school staff, students, and parents/families (if applicable) to understand and use the technology tool.
- c) Describe how the overall needs were assessed and identified for the school sites, teachers, and students in the sites that the technology was implemented.
- d) Describe some of the major challenges and barriers throughout the project and what were some of the changes needed that was not originally planned.

Installation Stage (All 327S grants in year 2+)

This stage is about establishing the resources and supports (e.g., training, coaching, and evaluation systems) needed to understand and use the technology innovation with fidelity, building the infrastructure necessary to implement the program or practice, building practitioner (e.g., administrators, educators, students, families) and organizational capacity.

- a) Describe how the project developed knowledge and skills (i.e., systems of training, coaching) to support the effective use of the innovation by end-users.
- b) Describe how and who from the school sites created a representative(s) to support project work.
- c) Describe what type of agreements, or communication methods are used between the project staff and users within the project. (How do trainers, educators, students know the expectation and how was it communicated? How are fidelity measurements described and/or taught and communicated?) **Initial Implementation Stage (All 327S grants in year 3+)**

The first use of an innovation by newly trained users and others working in a school and district environment that is just learning how to support the new ways of teaching (sometimes known as the “awkward” stage). As part of the iterative process that comes with the day-to-day reality of implementing and integrating the technology in K-12 classrooms or early childhood environments.

- a) Describe how users were trained and supported to use the technology.

- b) Describe any mid-course corrections that were made to use the technology tool or strategy with fidelity. How did this impact the projects major goals and outcomes?
- c) Describe meetings with users, feedback loops with leadership, teachers, families, and students were utilized to communicate about progress, improvement strategies and success.
- d) What additional trainings, professional learning supports were determined and why were they necessary?

Full Implementation/Outcomes Stage (All 327S grants in year 4 +) and Appropriate Use of Technology

If you have submitted this information in a previous year, please review and respond to the prompts below with more updated information.

In this section, provide evidence for how project collected from development, pilot and current sites were used “to ensure the appropriate use of the technology tool or strategy by teachers, early childhood providers, students, service providers, and/or parents.” For evidence of appropriate use, please provide information for the following areas:

The technology tool was used for **its intended instructional purposes**. Describe in detail:

- Intended users of the technology (e.g., parents, teachers, coaches, etc.) including the number of users
- Content area and/or instructional focus
- How the technology supports the specific needs of the target population (including resources and supports needed for effective use, if applicable)

The Population(s) for whom the technology tool was **found to be effective** is/are clearly identified and described. Describe in detail information about the users:

- Number of students served by the technology
- Age or grade level of students
- Disability group(s) of students served by the technology

Intended **users were adequately trained** in the use of the technology tool. Describe in detail:

- The knowledge and skills trainees are expected to learn through the training
- The minimum criterion skill level trainees need to use the tool appropriately
- How trainees demonstrated the required knowledge and skills learned during the training

The technology tool was **implemented with fidelity**. Describe in detail:

- How fidelity was measured (e.g., using a fidelity rubric and offering guidelines for the type and frequency of fidelity measurement)
- Fidelity benchmarks for minimally adequate use/implementation
- If fidelity fell short, how it was addressed throughout the project period

Dissemination (All 327S grants in year 5 and grants submitting a Final Report)

Describe any advances in knowledge and skills from evaluated changes in how teachers and others made use of the evidence-based technology or intervention, and any major lessons learned. Also, if not already provided to your project officer, list the dissemination/scale up sites (include numbers, locations, and rationale for selection) for year 5.

Be prepared to submit more information about your dissemination efforts to your Project Officer during the end of your fifth year.

Products and Resources (All project years)

List and describe the major resources and products that were developed (e.g., needs and readiness assessments, professional development modules, instructional manuals, lesson plans, demonstration videos, ancillary instructional materials), include why and for whom the products were developed. Describe important accessibility features embedded in learning modules, demonstration videos and ancillary instructional materials. Also include link to project website and how site was used to support end-users.