



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). **Technical Assistance on State Data Collection 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 for the Technical Assistance on State Data Collection Program are listed below and are aligned to the Technical Assistance and Dissemination Program measures used are the Government Performance and Results Act (GPRA) program measures. **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 **Technical Assistance on State Data Collection Program** are:

- **Program Performance Measure #1:** The percentage of technical assistance and dissemination products and services deemed to be of high quality by an independent review panel of experts qualified or individuals with appropriate expertise to review the substantive content of the products and services.
- **Program Performance Measure #2:** The percentage of technical assistance and dissemination products and services deemed by an independent review panel of qualified experts or members of the target audiences to be of high relevance to educational and early intervention policy or practice.
- **Program Performance Measure #3:** The percentage of all technical assistance and dissemination products and services deemed by an independent review panel of qualified experts or members of the target audiences to be useful to improve educational or early intervention policy or practice.
- **\*Program Performance Measure #4:** The cost efficiency of the Technical Assistance on State Data Collection Program includes the percentage of milestones achieved in the current annual performance report period and the percentage of funds spent during the current fiscal year.

\*For Program Performance Measure #4, please use the following project performance measure when you report against this target within the annual performance report:

“(X) milestones completed out of (X) milestones proposed for the current reporting period.”  
 “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.

### **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](mailto: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.