**Transcript of OSEP Webinar on January 12, 2022
Preparing Annual Performance Reports for OSEP**

Host: Center for Parent Information and Resources

Date: January 12, 2022

Presenters: Representatives of the U.S. Department of Education

Webinar archive: <https://www.parentcenterhub.org/2022-osep-apr-webinar/>

Watch/listen to the webinar: <https://youtu.be/vpZw7274S3o>

*Editor’s note: This transcript includes text-only versions of the presentation slides, to ensure accessibility of the many screenshots used throughout. All the slide text is indented directly below each slide’s number and title. Then you’ll see the transcript of what the presenter said.*

# **Text of the Webinar**

## Slide 1 | Title Slide

Presentation on Preparing Annual Performance Reports for OSEP

Recorded January 12, 2022

In 8 parts

OSEP | Office of Special Education Programs

Office of Special Education and Rehabilitative Services

***Carmen Sánchez*** [OSEP lead for the Parent Program]***:***

Welcome to OSEP's presentation on preparing annual reports for the Parent Program. I am Carmen Sánchez, the Parent Program Lead. My colleagues, the other OSEP Project Officers, will also present parts of this webinar today. The information covered in this webinar applies to the annual report that will be due in May of 2022. Next slide.

## Slide 2 | Agenda

Part 1: Overview and Reminders

Part 2: Measures and Data

*Guidance for completing APRs*

Part 3: Coversheet

Part 4: Executive Summary

Part 5: Section A

Part 6: Section B

Part 7: Section C

Part 8: New this year/timelines

*[Carmen Sánchez continues]:*  In this first part, we'll cover overview and reminders.

## Slide 3 | Part 1: Overview and Reminders

Outcomes:

* Grantees will have greater awareness of the purpose of annual performance reports.
* “Annual performance reports are required in order to continue a grant into a new budget period in compliance with ED policies.”

*[Carmen Sánchez continues]:*  The outcomes will be that you as grantees will have greater awareness of the purpose of annual performance reports, and that annual performance reports are required in order to continue a grant into a new budget period in compliance with Department of Education Policies. Next slide.

## Slide 4 | Reporting Requirements

Annual reporting of project performance measures

**EDGAR (§75.253)**

“The Secretary may make a continuation award for a budget period after the first budget period of an approved multi-year project if the grantee has made substantial progress in achieving the goals and objectives of the project.”

<https://www2.ed.gov/policy/fund/reg/edgarReg/edgar.html>

**ED Handbook for the Discretionary Grant Process (Section 5.4.8)**

“The determining factor in awarding a continuation grant is whether the recipient has made substantial progress within the scope of the approved application in attaining the objectives of the grant as evidenced by meeting the grant’s performance measures.”

<https://www2.ed.gov/policy/gen/leg/foia/foia-ofo-f-01.pdf>

*[Carmen Sánchez continues]:*  On slide 4, we'll be discussing reporting requirements. We will discuss performance reporting for annual reports. They are also known as continuation reports. This includes reports for projects that are currently under a no-cost extension and will not finish activities prior to the annual report due date.

And the annual report is required from each project during every fiscal year of the project period. EDGAR, or the Department of Education's Discretionary Grants Administrative Requirements, establishes that the funds to continue an award into a new budget period can be awarded only when the project demonstrates substantial progress towards meeting its goals and objectives. The annual program report is the means for the program to determine whether a project has made substantial progress towards its goals and objectives.

The "US Department of Education Handbook for Discretionary Grant Process" further clarifies that the goals and objectives of the project are those approved either in the application or subsequent OSEP-approved revisions. Let me emphasize the project performance measures are those measures that are in your grant application, or that have been revised and approved by your Project Officer. Next slide.

## Slide 5 | Grant Performance Report for Continuation Funding

* Dear Colleague Letter (also known as the Larry letter )
* Instructions for Submitting e-Reports
* ED 524B Instructions
* ED 524B Form

*[Carmen Sánchez continues]:*  Slide 5 is background performance reporting for continuation funding.

Grantees receive instructions on how to complete the APR from several sources. The Dear Colleague Letter, which we also refer to as the Larry letter, since it comes from Larry Wexler, the Research to Practice Division Director, includes the details of parent center program, including the program measures and due dates. Written instructions for submitting e-reports are available along with online links to the required forms and instructions for completing them.

This presentation will highlight certain key aspects in order to clarify the general online guidance for the specific expectations of the OSEP Parent Program. This webinar ***must not*** be used instead of the other guidance and instructions, but as a practical supplement to all other instructions. Do not hesitate to reach out to your regional TA provider or your project officer if you have any questions. Next slide.

## Slide 6 | APR Review

Consideration is given to the grantees’ performance in terms of both --

* Substantial progress toward achieving project outcomes
* Fiscal responsibility in use of federal funds

*[Carmen Sánchez continues]:*  In reviewing the annual performance report, the project officer seeks to find convincing evidence that the project has made substantial progress towards its goals and objectives. The project officer also seeks evidence of fiscal responsibility in the use of federal funds.

Before committing additional funds to a project, the Department looks at risk—that is, the likelihood that the federal funds will not produce expected outcomes. When that risk is too high or unclear based on the project performance and report, OSEP might reduce or deny continuation funding, might require additional information in the revised report, or might implement additional monitoring of the project.

In addition, we also look to see if the grantee is not spending down sufficient funding, and may be at risk for carrying over a large available balance into the new project period. If this is true for your grant, you will be contacted and receive information about what additional information you must provide should you be at risk for a large available balance.

Let me also stress that substantial progress is not the same as perfect progress. That means that you are making progress towards meeting your goals, and even if you haven't met them all, you're showing how you plan to meet them in the future. Next slide.

## Slide 7 | Complete the Report Online

## Sign into G5 to report

## Check access to G5 a week or more before report due date.

## Download Word version of 524-B Grant Performance Report.

* Part 1 – Cover Sheet and Summary
<https://www2.ed.gov/fund/grant/apply/appforms/ed524b_cover.doc>
* Part 2 – Project Status
<https://www2.ed.gov/fund/grant/apply/appforms/ed524b_status.doc>
* Part 3 – Instructions
<https://www2.ed.gov/fund/grant/apply/appforms/ed524b_instructions.doc>

*[Carmen Sánchez continues]:*  In slide 7, we want to talk about completing the report online. The APR will be submitted through G5. OSEP recommends the grantees check their access to G5 several weeks prior to the due date to ensure adequate time to resolve any potential issues.

Although the report will be submitted in G5, OSEP recommends drafting the report in a word processing program such as Ms Word or similar. Download all three parts of the 524-B Grant Performance Report form. You can also use any approved shell you have submitted to your project officer to fill in with the actual data.

When your report is finalized, you can cut and paste that information to the G5 online form. Some sections have character word limits. We recommend that you use clear, concise writing in your reports. However, G5 allows an additional document to be uploaded. You may create one document of the information that did not fit in the form, and upload that additional document. Next slide.

## Slide 8 | Submitting the Report

Work on the shell and report in Word then cut and paste into G5.

Use G5 to submit report online.

**A signed signature page (Board Chair\*) must accompany the final report.** Upload and attach the scanned signed coversheet into G5.

 \*Board Chair must be Certifying Official in G5.

You cannot make late submission without OSEP approval. G5 will lock you out if the report is late.

*[Carmen Sánchez continues]:*  In slide 8, we look at what you need to do to submit the report. As mentioned before, it is recommended that you draft your report using Ms Word. When you have it just the way you want it, copy the report into G5 to submit.

The cover sheet must be signed by your board chair or another designated board member if the board chair is unavailable. Upload a scanned, signed cover sheet into G5 for one submission into your permanent grant file.

G5 sends an automated note to your project officer that you have submitted your report. Do not be late, the system will lock you out at 4:30 PM Eastern Time on the due date. We recommend that you plan to submit your report at least one day before the deadline. If you anticipate being late, contact your project officer as soon as possible to get an extension of the due date, and to keep G5 open until the new agreed-upon due date. Next slide.

## Slide 9 | Resources

Documents

* “QRU Measures for Annual Reports”
* Dear Colleague Letter

People!

* TA
* OSEP

*[Carmen Sánchez continues]:*  In this slide we will go over the resources available to you. We will soon go over the kinds of measures that you must include in your report, program measures and project measures. On slide 9, we're going to discuss some resources available to you. We have already discussed reporting on project measures, that is the measures that you have in your grant application. We will soon go over the second kind of measures that you must report on, which are the program measures.

OSEP and the PTACs developed a document to assist Parent Centers in aligning project measures to program measures. This document, called the QRU Measures for Annual Reports, lists several common project measures and how they would align with program measures. The Dear Colleague Letter will be sent in a month or so. Read the letter carefully.

However, your most important resources are the folks at OSEP and TA. We are all interested in that Parent Centers submitting excellent reports that show the tremendous achievements your center has accomplished this year. Do not hesitate to ask questions. Next slide.

## Slide 10 | Keep in Mind

* Asking questions can be more important than having answers.
* Struggling with questions is the only way to get to answers.
* Begin completing your APR as soon as possible after receiving your Package. Avoid waiting until the last minute or week prior to submission date to begin.
* Families are helped best when parent programs work on continuous improvement.

*[Carmen Sánchez continues]:*  Slide 10. These are tips to keep in mind. The most important tip to keep in mind is that asking your questions is often more important than thinking you have the answers. It's only by asking questions that you can get clarification.

Project measurement and performance reporting can be difficult. So struggling with your questions can lead to better answers. And those better answers in turn can lead to better projects, which you as a center work continuously to improve your services.

So think about working on and completing your APR as soon as possible after you receive the Dear Colleague Letter, and the report package. Avoid waiting until the last minute to work on submission, and include your staff and your board in reviewing the report for completeness and accuracy.

## Slide 11 | Part 2: Measures and Data

Outcomes:

* Grantees will have a greater understanding of what is expected of them in the annual reports.
* Grantees will feel more confident in completing and submitting their annual reports.

***Presenter Kristen Rhoads:***

Okay. Hi, welcome to part two of the presentation Measures and Data. I'm Kristen Rhoads, Project Officer for Region B. And at the end of this section, you will have a greater understanding of what is expected of the data you include in your annual reports. You'll feel more confident in completing and submitting your data. Next slide.

## Slide 12 | Project Objectives

* The Project Objectives are what you are trying to accomplish and come from your grant application or subsequent revisions.

(May be called goals in your application)

* Project Objectives should be relevant, applicable, focused, and measureable.

*[Kristen Rhoads continues]* But first, we need to define a few terms. **Project objectives** or goals are the overreaching purposes of your project. That is, what you said the project would accomplish in the grant application or any approved provisions.

Project objectives should be written so that they are clear... ...it is clear to what extent your project is attaining them. They must be relevant and applicable to the parent program. They should be focused. Project objectives that are too broad tend to provide no focus for project implementation.

And finally, project objectives must be measurable. Project objectives are included in the status chart. Next slide please.

## Slide 13 | Program Performance Measures

Program Measures

* + Measures are determined by the Parent Program in order to meet GPRA measures:

—Quality

—Relevance

—Usefulness

* + All must be mentioned at least once.
	+ Projects **DO NOT** report data on the Program Measures.

*[Kristen Rhoads]* The second term we must define is **program measures**. These measures are determined by the parent program to measure program performance and compliance with the Government Performance and Results Modernization Act of 2010. You may know it as GPRA.

The parent program has three GPRA measures, which relate to the quality relevance and usefulness of the activities supported through OSEP funds. Each of the GPRA measures must be listed on your APR at least once. You can cut and paste the GPRA measures and their corresponding targets from the QRU measures for annual reports. However, you do not report any data on the GPRA measure.

Underneath each GPRA program measure, though, you must list at least one project measure that aligns with that GPRA program measure. And we'll provide a few examples in upcoming slides. Next slide, please.

## Slide 14 | Project Performance Measures

Project Measures

* What you said you would do in your application or subsequent approved revisions
* Some are measures of process or outputs (e.g., number of workshops, number of attendees).
* Some are measures of outcomes (e.g. number of attendees with increased knowledge).
* Must be clear and measureable

*[Kristen Rhoads]* The final term to be defined is **Project Measure**. These measures and targets are from your project application. They're what you said you would do in your application. These are your outputs and outcomes. *Outputs* refer to the process or activities of the project. Examples include numbers of workshops and numbers of the attendees. *Outcomes* refer to changes as a result of the outputs. An example is number of attendees with increased knowledge.

Although both are important for projects to collect, outcomes are the important results that indicate impact. Sometimes project measures need to be revised for clarity, and they must be measurable. Your data will demonstrate your project performance against these project measures and targets. Next slide, please.

## Slide 15 | Project Measure Alignment

At least one Project Measure must be aligned with each Program Measure.

Examples are available at:

<http://www.parentcenterhub.org/wp-content/uploads/2016/01/QRU-Measures-for-Annual-Reports-1-12-16.docx>

*[Kristen Rhoads]* At least one project measure must be aligned with each program measure. And examples are available at the website provided on this slide. Next slide, please.

## Slide 16 | The Basics on Data

* Do you have numbers?
* Do you know how to collect data?
* Are you collecting it?
* How do you report it?
* How do you use data you already have? (e.g., surveys, evaluation, and demographic data)

*[Kristen Rhoads]* The basic strength or integrity of your data is known based on the responses to these few questions. Do you have numbers? Do you know how to collect data? Are you collecting it? How do you report it? How do you use data you already have? For example, how do you use your surveys, evaluation, and demographic data?

Everything can be data, it's crucial to identify the specific sources and types of data that best describe your project's progress. What data do you already collect and how do you ensure that there isn't any bias in your data? Next slide, please.

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## Slide 17 | Reporting Data

* Be as specific as possible about what you are counting (e.g., individual parents or families; all attendees or parent attendees; contacts or individuals served).
* Specify the source of your data (e.g., surveys, sign-in sheets, contact logs).
* If you are counting individuals, specify if the number is duplicative (i.e., you count each time a person calls as a separate contact).

*[Kristen Rhoads]* When reporting the numbers, the methods behind the numbers are equally important and must be described in the narratives. The report should concisely inform the reader what is included and what is not included in the numbers. Some prompts for stronger data reporting are included on the slide.

Be as specific as possible about what you are counting. Are you collecting data from individual parents versus families. All attendees versus parent attendees. Contacts versus individuals served. Specify the source of your data. Is your source surveys, sign-in sheets, contact logs. If you are counting individuals, specify if the number is duplicative. In other words, you should count each time a person calls as a separate contact.

## Slide 18 | Part 3: Cover Sheet

Outcomes:

* Grantees will have a greater understanding of what is expected of them in the annual reports.
* Grantees will feel more confident in completing and submitting their annual reports.

***Presenter Perry Williams:***

Hi, my name is Perry Williams, Project Officer for the Parent Program, Region D. And this section of Part 3, the Cover Sheet, you will have a greater understanding of what is expected of you in the annual performance reports. You'll also feel more confident in completing and submitting your annual reports. Next slide.

## Slide 19 | Cover Sheet—Top

[Screenshot of the 524 form, with **example** text filled in and highlighted in yellow.]

U.S. Department of Education

 Grant Performance Report Cover Sheet (ED 524B)

 *Check only one box per Program Office instructions.*

 [ X ] Annual Performance Report [ ] Final Performance Report

**General Information**

1. PR/Award #: H328M200000 2. Grantee NCES ID#: N/A

 *(Block 5 of the Grant Award Notification - 11 characters.) (See instructions. Up to 12 characters.)*

3. Project Title: Parent Center

 *(Enter the same title as on the approved application.)*

4. Grantee Name *(Block 1 of the Grant Award Notification.)*: Organization Name

5. Grantee Address *(See instructions.)* Only needed if address has changed

6. Project Director *(See instructions.)* Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Ph #: ( ) \_\_\_\_\_\_\_\_ - \_\_\_\_\_\_\_\_\_\_ Ext: ( ) Fax #: ( ) \_\_\_\_\_\_\_\_ - \_\_\_\_\_\_\_\_\_\_

 Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Reporting Period Information** ***(See instructions.)***

7. Reporting Period:

 From: 03/01/2021 To: 02/28/2022 (Continuing)

 From: 09/01/2021 To: 02/28/2022 (New Award)

*[end of slide text]*

*[Perry Williams]:* The next few slides are screenshots of an example Cover Sheet with crucial items highlighted to draw your attention. This slide shows the top third of the Cover Sheet.

This annual report mark Annual Performance Report in the form's header. On Line 1, enter your PR/Award number. All parent program PR numbers begin with H328.

On Line 2, enter N/A. Complete Lines 3 and 4. Line 5 need only be filled in when your address has changed. Complete Line 6.

Line 7 shows the reporting period covered by this report and will be completed in one of the two ways shown on this slide. If your grant was awarded in 2021, yours is a new award. Line 7 for new award should be completed with the following dates. From 9/1/21 to 02/28/2022. All other awards are continuing, for which Line 7 should be completed with the dates from 03/01/2021 to 02/28/2022.

Please note that the reporting period ends 02/28/2022 for all awards. The data used for this report will reflect the activities and outcomes from this indicated reporting period. Next slide.

## Slide 20 | Cover Sheet – Middle (No Rate)

*[The information shared on this slide comes from a screenshot of the middle of 524 form, with* ***example*** *text filled in and highlighted in yellow. We have recreated that image, using text for accessibility]*

 **Budget Expenditures** ***(To be completed by your Business Office. See instructions. Also see Section B.)***

8. Budget Expenditures

|  |  |  |
| --- | --- | --- |
|  | **Federal Grant Funds** | **Non-Federal Funds**  |
| a. Previous Budget Period | Continuing Award: entire previous budget period (e.g., $265,239)New Award: leave blank |  |
| b. Current Budget Period | Actual expenditures for budget period (e.g., $252,209) |  |
| c. Entire Project Period*(For Final Performance Reports only)* |  |  |

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

9. Indirect Costs

 a. Are you claiming indirect costs under this grant? \_\_\_Yes \_X\_No (When you mark no, do not fill out b-e)
 If yes, please indicate which of the following applies to your grant?

 b. \_\_\_\_ The grantee has an Indirect Cost Rate Agreement approved by the Federal Government:

 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)* is: \_\_ Provisional \_\_ Final \_\_ Other *(Please specify):*

c.\_\_\_ The grantee is not a State, local government, or Indian tribe, and is using the de minimus rate of 10% of modified total direct costs (MTDC) in compliance with 2 CFR 200.414(f).

d.\_\_\_ The grantee is funded under a Restricted Rate Program and is using a restricted indirect cost rate that either:

\_\_\_ Is included in its approved Indirect Cost Rate Agreement; or
\_\_\_ 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); or
\_\_\_ Is recovering indirect costs using its actual negotiated indirect cost rate.

*[End of slide content]*

*[Perry Williams]:* Line 8 is the budget information. Line 8a will vary depending on whether this report is for a new award or a continuing award. For new awards, leave line A blank. For continuing awards, line 8a should be the expenditures reported in the last continuation report.

Line b reports the funds actually expended during the reporting period. Leave Line c blank for annual performance reports. Line 9 shows the grant indirect cost information. On this slide, we show how to complete this form when you are not using an indirect cost rate. Mark No on Line a and proceed to Line 10. Next slide.

## Slide 21 | Cover Sheet – Middle (Negotiated Rate)

*[Again, the information on this slide comes from a screenshot of the middle of 524 form, with* ***example*** *text filled in and highlighted in yellow. We provide a text-only version of the screenshot.)*

 **Budget Expenditures** ***(To be completed by your Business Office. See instructions. Also see Section B.)***

8. Budget Expenditures

|  |  |  |
| --- | --- | --- |
|  | **Federal Grant Funds** | **Non-Federal Funds**  |
| a. Previous Budget Period | Continuing Award: entire previous budget period (e.g., $265,239)New Award: leave blank |  |
| b. Current Budget Period | Actual expenditures for budget period (e.g., $252,209) |  |
| c. Entire Project Period*(For Final Performance Reports only)* |  |  |

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

9. Indirect Costs

 a. Are you claiming indirect costs under this grant? \_X\_Yes \_\_\_No
 If yes, please indicate which of the following applies to your grant?

 b. \_ X\_\_ The grantee has an Indirect Cost Rate Agreement approved by the Federal Government:

 The period covered by the Indirect Cost Rate Agreement is from: 06/01/2020 to: 05/31/2022 (*mm/dd/yyyy)*

 The approving Federal agency is: \_X\_ED \_\_\_Other *(Please specify):* \_\_\_\_\_\_\_\_\_

 The Indirect Cost Rate is \_\_11\_\_% (Enter actual rate from your agreement. We used 11% for example)

 Type of Rate *(For Final Performance Reports Only)* is: \_\_ Provisional \_\_ Final \_\_ Other *(Please specify):*

c.\_\_\_ The grantee is not a State, local government, or Indian tribe, and is using the de minimus rate of 10% of modified total direct costs (MTDC) in compliance with 2 CFR 200.414(f).

d.\_\_\_ The grantee is funded under a Restricted Rate Program and is using a restricted indirect cost rate that either:

\_\_\_ Is included in its approved Indirect Cost Rate Agreement; or
\_\_\_ 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); or
\_\_\_ Is recovering indirect costs using its actual negotiated indirect cost rate.

*[End of slide content]*

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*[Perry Williams]:* Direct your attention to slide 21. This slide shows you how to complete Line 9, when you have a **negotiated indirect cost rate**. When you have a negotiated indirect cost rate, mark Yes on Line a. Mark X beside Line b and fill in the requested information from your negotiated agreement.

This information on this sample slide is just an example. Do not copy the information shown on this slide. After completing this information from your agreement, proceed to Line 10. Next slide.

## Slide 22 | Cover Sheet – Middle (de minimus)

*[Again, the information on this slide comes from a screenshot of the middle of 524 form, with* ***example*** *text filled in and highlighted in yellow. We provide a text-only version of the screenshot.)*

 **Budget Expenditures** ***(To be completed by your Business Office. See instructions. Also see Section B.)***

8. Budget Expenditures

|  |  |  |
| --- | --- | --- |
|  | **Federal Grant Funds** | **Non-Federal Funds**  |
| a. Previous Budget Period | Continuing Award: entire previous budget period (e.g., $265,239)New Award: leave blank |  |
| b. Current Budget Period | Actual expenditures for budget period (e.g., $252,209) |  |
| c. Entire Project Period*(For Final Performance Reports only)* |  |  |

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

9. Indirect Costs

 a. Are you claiming indirect costs under this grant? \_X\_Yes \_\_No
 If yes, please indicate which of the following applies to your grant?

 b. \_\_\_\_ The grantee has an Indirect Cost Rate Agreement approved by the Federal Government:

 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)* is: \_\_ Provisional \_\_ Final \_\_ Other *(Please specify):*

c. \_X\_ The grantee is not a State, local government, or Indian tribe, and is using the de minimus rate of 10% of modified total direct costs (MTDC) in compliance with 2 CFR 200.414(f).

d.\_\_\_ The grantee is funded under a Restricted Rate Program and is using a restricted indirect cost rate that either:

\_\_\_ Is included in its approved Indirect Cost Rate Agreement; or
\_\_\_ 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); or
\_\_\_ Is recovering indirect costs using its actual negotiated indirect cost rate.

*[End of slide content]*

*[Perry Williams]:* This slide shows you how to complete Line 9. When you use the **de minimis indirect cost rate**, mark Yes on Line a and mark X beside Line c. Proceed to Line 10. Next slide.

## Slide 23 | Cover Sheet—Human Subject and Data

 **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

*[Perry Williams]:* Questions 10 and 11 are about human subject research and data privacy. Both questions are not applicable to the parent centers. Mark N/A on both. Next slide.

## Slide 24 | Cover Sheet—Signature

**Performance Measures Status and Certification** *(See instructions.)*

12. Performance Measures Status (Only check “yes” on Final Performance Report.)

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

b. If no, when will the data be available and submitted to the Department? 11/31/2026 (Use due date of Final Report.)

12. 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 Feder-al award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false 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.

\_\_\_\_\_Joan Board—President\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_Board Chair\_\_\_

 Name of Authorized Representative

\_\_\_\_\_Joan Board--President\_\_\_\_\_\_\_\_\_ Date: 04/21/2022

 Signature

*[End of slide content.]*

*[Perry Williams]:* Direct your attention to slide 24, please. Mark No on Line 12 a, since this is not the project's final report. On Line 12 b, indicate your final report due date. This date is 90 days after the end of your project period. For example, if your project is due to end August 30th, 2021, you would write 11/31/2026.

If you're not sure of your project end date, review your GAN, your grant award notification, or ask your project officer. Next slide.

## Slide 25 | Section 4: Executive Summary

Outcomes:

* Grantees will have a greater understanding of what is expected of them in the annual reports.
* Grantees will feel more confident in completing and submitting their annual reports.

*[Perry Williams]:* In this Section 4: Executive Summary, you will have a greater understanding of what is expected in this particular section. You'll also feel more confident in completing and submitting your report. Next slide.

## Slide 26 | Sample Executive Summary

[Screenshot of the 524 form, with **example** text filled in and highlighted in yellow.]

U.S. Department of Education

 Grant Performance Report Cover Sheet (ED 524B)

 *Check only one box per Program Office instructions.*

 [ X ] Annual Performance Report [ ] Final Performance Report

PR/Award # (11 characters): H328M200000

**(See Instructions)**

In no more than 1000 words (approximately 2 single-spaced pages):

* Summarize project’s accomplishments for the reporting period (1 year for continuing grants or roughly 5 months for new awards).
* Organize the Executive Summary in any way that best communicates the project performance for the readers; e.g., by major project goals.
* Be honest about where you fell short, not just where you were wildly successful.
* Include anecdotes to highlight these accomplishments.

**Sample**

*State X’s Parent Training Project* serves families of infants, children, and youth with all types of disabilities, youth with disabilities, and related professionals. *Parent Center* was awarded the parent training grant on October 1, 2020. The overall goal of *Parent Training Project* is to improve outcomes for children and youth with disabilities by providing information and training to parents, youth, and professionals on special education law and evidence-based research.

*Parent Training Project* has five major goals. This report summarizes the project’s activities and accomplishments under each goal for the period of March 1, 2021 to February 28, 2022. (Remember that if yours is a new award, the dates would be October 1, 2021 to February 28, 2022.)

*[end of slide content]*

*[Perry Williams]:* The executive summary is the next section of the report. However, OSEP recommends that it is best that you complete this section last.

This section is designed to give an overview of the successes and challenges during this project period. It may be organized however you choose, although typically grantees organize the summary according to the few overarching project objectives.

This section must not include the level of detail covered in other sections, which is why we recommend that you write up the information in the other sections before summarizing it in the executive summary.

Also, remember there's no benefit for writing lengthy responses. Be as concise and direct while maintaining clarity in your summary as possible. Refer the reader where, in other sections, that she or he can locate the supporting details as needed. Next slide, please.

## Slide 27 | Sample Executive Summary – Objectives

**Goal 1: Workshops** *Parent Training Project* presented eight workshops virtually and recorded for in-demand viewing, falling short of the goal of 10 workshops. Workshop topics included “Introduction to the IEP”, “Positive Behavior Interventions”, and “Transition to Adulthood.” Workshop evaluations were high with an average of 3.7 out of possible points. A total of 53 youth attended the three trainings with youth-focused topics of “Understanding the nature of my disability”, “Self-determination and Self-advocacy”, and “Participating in IEP meetings.”

**Goal 2: Individual Assistance** The goal of providing 1,000 parents and professionals with individual assistance via phone, email, and Zoom was exceeded. *Parent Training Project* assisted 1,628 individuals during the last year. Parent advocates also attended 10 facilitated IEP meetings and 5 mediation sessions. *Parent Training Project* strives to resolve disagreements at the lowest level possible. Parent advocates assist parents to understand their rights and responsibilities under the law so they can more effectively participate in their child’s education. An emphasis is placed on parent-professional partnerships.

**Goal 3 Outreach to Underserved Parents** *Parent Training Project* is committed to reaching underserved populations through training and individual assistance. Three of the 12 trainings presented during this reporting period were in languages other than English—2 in Spanish and 1 in Vietnamese. A Spanish-speaking parent advocate works at *Parent Center* 3 days a week and is available to provide individual assistance via phone, email, or Zoom.

**Goal 4 Parent Professional Partnerships** *Parent Training Project* provides workshops for parents and professionals on how to communicate more effectively and better understand the others’ perspectives. *Parent Center* staff participate on 5 state and local boards and committees.

**Goal 5 Information Dissemination**  *Parent Center* maintains a website for parents and professionals to stay current on special education news and research. The website received over 10,000 visits this reporting period, which is a 25% increase over last year. *Parent Center* also maintains a social media account for youth to access current information. We have 900 followers, exceeding our target of 250.

*[end of slide content]*

*[Perry Williams]:* The final slide of this section shows a sample executive summary. Please note each project objective here listed as a goal is followed by only a few sentences of summary. As you can see, there's limited data in this summary. Most data are included under the measures. In the next few slides, Kristen will discuss sections A and B of the status chart.

## Slide 28 | Part 5: Section A

Outcomes:

* Grantees will have a greater understanding of what is expected of them in the annual reports.
* Grantees will feel more confident in completing and submitting their annual reports.

***Presenter Kristen Rhoads:***

Hi, this is Kristen Rhoads, I'm the Project Officer for Region B, and welcome to Part 5 of our presentation on Section A. At the end of this webinar, you will have a greater understanding of what is expected of the data you included in your annual reports and you'll feel more confident in completing and submitting your annual reports. Next slide, please.

## Slide 29 | Blank Status Chart

U.S. Department of Education

Grant Performance Report (ED 524B)

Project Status Chart

PR/Award # (11 characters): \_\_\_\_\_\_H328M200000\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SECTION A - Performance 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.

|  |  |  |
| --- | --- | --- |
| **1.a.Performance Measure** | **Measure Type** | **Quantitative Data** |
|  |  | **Target** | **Actual Performance Data** |
| **Raw data** | **Ratio** **/** | **%** | **Raw data** | **Ratio** **/** | **%** |
|  |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **1.b.Performance Measure** | **Measure Type** | **Quantitative Data** |
|  |  | **Target** | **Actual Performance Data** |
| **Raw data** | **Ratio** **/** | **%** | **Raw data** | **Ratio** **/** | **%** |
|  |  |  |  |  |  |

 Explanation of Progress (Include Qualitative Data and Data Collection Information):

*(end of slide content)*

*[Kristen Rhoads]:* We'll now discuss how to fill in section A, the status chart. Here's a blank form. The top, circled in green, is where you indicate your project objectives, sometimes called a goal in your application. Do not check the box as you are reporting on a period for which you have yet to report.

The box to the left is where you write the narrative of the proposed measure. The next column is where you indicate the measure is either a project measure or program measure, and we've defined each of these earlier in the webinar. And the last two columns circled in red are for quantitative data. Lastly, at the bottom, you put in narrative to explain your data. Next slide, please.

## Slide 30 | Status Chart—Targets

Target and Actual Performance Data

* Provide the target you established for meeting each performance measure
* Provide actual performance data demonstrating progress towards meeting or exceeding this target
* Only quantitative (numeric) data should be entered in the Target and Actual Performance Data boxes.

*[Kristen Rhoads]:* Please note that in the status chart’s section A of the report, the columns on the right allow grantees to indicate targets and actual performance data for each project measure. These data are quantitative only. The targets were included in your application or approved through subsequent revisions with your project officer. The actual performance data are where you report your project performance during the reporting period. Next slide please.

## Slide 31 | Status Chart—Data

The Target and Actual Performance Data boxes are each divided into three columns:

* Raw Number
* Ratio
* Percentage (%)

*[Kristen Rhoads]:* As shown on the status chart, there are three columns for the data. Each column refers to the common types of targets and performance data, one column for each type, raw number, ratio, and percentage, and I will describe each type and how to report it through the next few slides. Next slide, please.

## Slide 32 | Status Chart – Raw Number

* Use when performance measures are stated in terms of a single number (e.g., the number of workshops that will be conducted or the number of students that will be served).
* Please leave the Ratio and Percentage (%) columns blank

*[Kristen Rhoads]:* When your performance measure is stated in a single number it is reported as a raw number. The number from the measure is the target—for example, the number of workshops planned. The actual performance data is also a raw number—for example, the number of workshops conducted. When reporting a raw number, leave the ratio and percentage columns blank. Next slide, please.

## Slide 33 | Status Chart—Ratios and Percentages

* Use when performance measures are stated in terms of a percentage (e.g., percentage of materials deemed to be of high quality).
* Complete both the Ratio column and the Percentage (%) column.
* Please leave the Raw Number column blank.

*[Kristen Rhoads]:* Measures stated in terms of percentages must be reported in both ratio and percentage, leave the raw number blank. Next slide, please.

## Slide 34 | Status Chart—Ratios

In the Ratio column (e.g., 99/100):

* the numerator represents the numerical target or actual performance data (e.g., the number of materials deemed to be of high quality)
* the denominator represents the universe (e.g., all products produced or reviewed)
* Please enter the corresponding percentage (e.g., 99%) in the Percentage (%) column.

*[Kristen Rhoads]:* In the ratio column, for example, 99 of 100, the numerator represents the numerical target or actual performance data, the number of materials deemed to be of high quality, the denominator represents the universe, all products produced or reviewed. Please enter the corresponding percentage, 99% in the example in the percentage column.

In the column where you report target ratios and percentages, you may represent the ratio as X over 100 or any other number you choose to arrive at the percentage.

In the actual column, the ratio demonstrates the actual numbers on which the percentage is based. So if you receive 48 surveys, 46 of which were positive, the ratio in the actual column would be 46 over 48. The percentage allows us to compare the actual to the target in the performance measure. Some examples will be provided in a few slides. Next slide, please.

## Slide 35 | Status Chart – Reminders for grants in their first budget period

If baseline data for a performance measure were not included in your approved application and targets were not set for the first budget period, then enter either the number **999** under the **Raw Number column** or the ratio **999/999** under the **Ratio column** of the **Target box**, depending on how your data will be reported in the future.

*[Kristen Rhoads]:* During the first reporting period, projects may have limited data from the six months between September and February. Projects might need to establish baseline data to determine an appropriate target. After baseline data have been collected during the first budget period, grantees are expected to set targets for the second and any subsequent budget periods and report actual performance data in their annual performance reports.

When the project has no valid target and no real performance data, 999 should be entered as the raw number and 999 over 999 as the ratio for targets that are percentages. In the next few slides, I will cover some examples of how you can report different scenarios. Next slide, please.

## Slide 36 | Status Chart - Output Project Measures

U.S. Department of Education

Grant Performance Report (ED 524B)

Project Status Chart

PR/Award # (11 characters): \_\_\_\_\_\_H328M200000\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SECTION A - Performance 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.

|  |  |  |
| --- | --- | --- |
| **1.a.Performance Measure** | **Measure Type** | **Quantitative Data** |
| Provide one-on-one support to families via phone, text, email, and in-person | **PROJECT** | **Target** | **Actual Performance Data** |
| **Raw data** | **Ratio** **/** | **%** | **Raw data** | **Ratio** **/** | **%** |
| **500** |  |  | **672** |  |  |

|  |  |  |
| --- | --- | --- |
| **1.b.Performance Measure** | **Measure Type** | **Quantitative Data** |
| Provide youth training via Zoom, Teams, or Facebook Live | **PROJECT** | **Target** | **Actual Performance Data** |
| **Raw data** | **Ratio** **/** | **%** | **Raw data** | **Ratio** **/** | **%** |
| **75** |  |  | **62** |  |  |

 Explanation of Progress (Include Qualitative Data and Data Collection Information):

1.a. These data are duplicative count.

1.b. We held 8 Zoom meetings, 4 of which were for Spanish-speaking youth. Between 6 and 11 youth attended each training. The data are duplicative count.

*(end of slide content)*

*[Kristen Rhoads]:* This slide shows a scenario of an output measure. Output measures do not align with program measures, so there is no need to align outputs under a quality, relevance, or usefulness measure.

In the first example listed as a performance measure, 1a, the number of attendees 500 is the target output. It is a raw number. The actual performance was 672, which is also reported as a raw number. In the second example written as a performance measure, 1b, is the target for youth participating in trainings. The target was 75, and the actual is 62.

Notice that the wording of the performance measure does not include the target. Since the number in the target is clear, there is no need to repeat the number in the performance measure description, but you may include the number in the narrative description.

Notice also in the explanation of progress that is noted that the data are duplicative. That is, the reader knows that families were given the support 672 times in the reporting period, but fewer individual families than 672 received assistance since some of the families received assistance multiple times. Next slide, please.

## Slide 37 | Status Chart - Outcome Project Measures (doesn’t appear in REV version!)

|  |  |  |
| --- | --- | --- |
| **1.a.Performance Measure** | **Measure Type** | **Quantitative Data** |
| The percentage of parents receiving in-person support at IEP meetings who reported on a post-case conference survey that the support received helped improve communication with the school personnel. | **PROJECT** | **Target** | **Actual Performance Data** |
| **Raw data** | **Ratio** **/** | **%** | **Raw data** | **Ratio** **/** | **%** |
|  | **95/100** | **95** |  | **90/92** | **98** |

|  |  |  |
| --- | --- | --- |
| **1.b.Performance Measure** | **Measure Type** | **Quantitative Data** |
| Percentage of recipients of PTI training and resources who provided feedback expressed they use the knowledge acquired from the PTI in working cooperatively and collaboratively with school personnel toward their child’s development, achievement, and life-long success. | **PROJECT** | **Target** | **Actual Performance Data** |
| **Raw data** | **Ratio** **/** | **%** | **Raw data** | **Ratio** **/** | **%** |
|  | **70/100** | **70** |  | **22/22** | **100** |

*(end of slide content)*

*[Kristen Rhoads]:* This slide shows how to handle performance measures that are percentages. Notice that in the target for both measures, the ratio is expressed as a numerator over a denominator of 100, but in the actual data the numerator is expressed as the actual positive responses over the actual number of surveys received.

## Slide 38 | Status Chart - Program-aligned Project Measures

|  |  |  |
| --- | --- | --- |
| **1.a.Performance Measure** | **Measure Type** | **Quantitative Data** |
| The percentage of PTI Program products and services deemed to be of high relevance to educational and early intervention policy or practice by an independent review panel of qualified experts with appropriate expertise to review the substantive content of the products or services. | **PROJECT** | **Target** | **Actual Performance Data** |
| **Raw data** | **Ratio** **/** | **%** | **Raw data** | **Ratio** **/** | **%** |
|  | **93/100** | **93** |  | **99/100** | **99** |

|  |  |  |
| --- | --- | --- |
| **1.b.Performance Measure** | **Measure Type** | **Quantitative Data** |
| The percentage of parents who report increased knowledge or understanding of the IFSP/IEP process. | **PROJECT** | **Target** | **Actual Performance Data** |
| **Raw data** | **Ratio** **/** | **%** | **Raw data** | **Ratio** **/** | **%** |
|  | **80/100** | **80** |  | **411/424** | **97** |

 *(end of slide content)*

*[Kristen Rhoads]:* Here's an example of an outcome project measure aligned with the program measure. In this example, the program measure is the relevance gap or measure along with its target, which were copied from the QRU measures for annual reports.

Grantees do not report actual performance data on the GPRA program measures. Instead, grantees write 99 over 100 or 99% as a dummy entry.

The project measure aligned with the relevance measure has a target of 80% of families report increased knowledge of the IFSP-IEP process. This measure is reported as a ratio, in this example, 80 over 100, in a percentage 80%. The actual performance on this measure is also reported as a ratio, for example, 411 over 424, and a percentage, 97%. This example highlights that the performance data of the 424 responses to the survey, 411 indicated increased knowledge. Next slide, please.

## Slide 39 | Status Chart – Narrative

Briefly provide notes on the data and their collection and analysis.

Examples from previous slides include:

* 1.a. These data are duplicative count.
* 1.b. We held 8 Zoom meetings, 4 of which for Spanish-speaking youth. Between 6 and 11 youth attended each training. The data are duplicative count.
* 3.b. Data collected through survey given immediately following the individual assistance. The data may be duplicative counts of individuals served.

*[Kristen Rhoads]:* In the narrative include any analysis or explanation that sheds light on your data and data collection. You can also include other qualitative data such as comments from surveys or the names of key partners in the work. Be succinct and choose the explanation carefully so as not to needlessly duplicate information found in other sections, such as the executive summary.

## Slide 40 | Part 6—Section B

Outcomes:

* Grantees will have a greater understanding of what is expected of them in the annual reports.
* Grantees will feel more confident in completing and submitting their annual reports.

*[Kristen Rhoads]:* Hi, welcome to Part 6 of our webinar on Section B. This is Kristen Rhoads, I am the Project Officer for Region B. At the end of this webinar and this section, you will have a greater understanding of what is expected of the data you include in your annual reports, and you will feel confident in completing and submitting your data. Next slide, please.

## Slide 41 | Budget Changes

* Describe budget, costs, and use of funds.
* When there has been a **change** in your budget
	+ Indicate the changes by stating moving funds among lines; and
	+ Include date of approval by project officer, if required.

*[Kristen Rhoads]:* All right, Section B of the 524 form allows grantees to describe their budget information for the reporting period. Many parent center grantees are in regular communication with their project officer about updates on project performance and any relevant budget implications. In fact, many parent centers submit requests for changes to budgets as needed throughout the project period.

However, some parent centers fail to communicate regularly with OSEP on changes made to their budgets. In those instances or if your project officer indicates that you must include information about an approved change in your annual report, the reporting of changes must be made in the APR in section B. Next slide, please.

## Slide 42 | Budget Information

SECTION B - Budget Information (See Instructions. Use as many pages as necessary.)

If applicable, describe any changes to project budget:

* Resulting from modification of project activities;
* Affecting your ability to achieve approved project activities or objectives; and
* Approved by your Project Officer and the date of approval.

If identified as having potential Large Available Balance (LAB):

* Explain unexpended funds;
* Detail encumbered costs to end of budget period; and
* Estimate amount ($) and percentage of annual award (%) of carryover.

If funds will be carried over to next budget period:

* Provide estimated amount;
* Explain why;
* Describe plan for their use.

Optional: you may include a table of expenditures.

Examples:

1. There have been no significant modifications to our budget this year. We do not anticipate the need to modify our budget next year.
2. We have not traveled to extent proposed in the application. Project activities have changes from in-person to virtual, but number and frequency are unchanged. The unused travel budget has been allocated to technology and professional development to enhance our capacity to participate in virtual meetings. Our project officer approved this budget change via email dated April 13, 2021.
3. Two long-time staff retired this year. We estimate approximately $7300 unspent personnel funds resulting from the 60 days to hire new staff and the lower salary and fringe for new hires. We plan to use these funds to contract to redesign our most used resource into youth-friendly versions.

*[End of slide content]*

*[Kristen Rhoads]:* Section B of the APR must include description of significant changes to the project budget that result from modifications of the project activities. If changes to the budget might interfere with the project activities, the project achieving its proposed and approved activities and objectives, those changes must be described.

However, the project will modify activities in order to achieve project objectives should also be provided in this section. The grantees should include the date of prior project officer approvals to budget changes. If a project is identified as having a large available balance, this section must include an explanation of what the project will do to address the issue. If the project believes that there will be carry over of funds, even if there is no large available balance, the project must include information about the potential carryover funds and how these carryover funds will be expended to meet the project objectives. Grantees often report these budget changes in a table. This section can also include an explanation of funds expended as listed on the cover sheet line 8B.

## Slide 43 | Part 7—Section C

Outcomes:

* Grantees will have a greater understanding of what is expected of them in the annual reports.
* Grantees will feel more confident in completing and submitting their annual reports.

***Presenter Yolanda Lusane:***

Welcome to Part 7: Section C. My name is Yolanda Lusane and I am the project officer for the community parent resource centers. The outcomes of this section are that grantees will have a greater understanding of what is expected of them in their annual reports and feel more confident in completing and submitting their annual reports. Next slide.

## Slide 44 | Section C—Other Information

* **All** reports must contain information about organization eligibility.
(Information on Board membership showing representativeness of the community/ region/ state served and majority being parents of children with disabilities under age 26)
* Briefly **describe the COVID-19 pandemic’s impact** on your project’s management, budget, and activities.
* Use this section to add status Chart narrative notes that exceed character limits. *Remember to label the note clearly with the measure number and letter.*

*[Yolanda Lusane]:* Section C allows grantees to report on any information not included in other sections of the form. This section can include information on language access and outreach plans, as well as other significant organizational information.

As you know, non-profit parent organizations are the only grantees eligible to be awarded a PTI or CPRC. The definition of parent organization is defined in statute. Parents center grantees must affirm their ongoing eligibility to be awarded a parent program grant, by providing the organizational information in section C of the APR. Specifically, a majority of the board must be parents of children with disabilities. In addition, you will need to include a brief description of the COVID-19 pandemics impact on the management activities and budget of your project. Next slide.

## Slide 45 | Section C—Example

SECTION C—Additional Information (See instructions. Use as many pages as necessary.)

(Use this section to describe any relevant aspect of your project not covered elsewhere in the report, such as unanticipated outcomes or benefits from the project.)

**Example**

Our language access plan was updated and presented to the Board of Directors on July 15, 2021.

The mission of our parent center is “to empower families and youth to individually and collectively advocate for improved functional and educational outcomes for children with disabilities.”

Our Board is comprised of 11 members, 7 of whom are parents of children with disabilities under the age of 26 years. Each member is appointed to serve a three-year term; a second term is allowed. After two consecutive terms, the Board member must vacate the position for, at least, one year. Officers are elected by Board members from the membership. The Board of Directors currently includes:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Role(s)** | **Parent of CWD** | **Representing** | **Board Role** | **Term** |
| Joan Doe | Parent, General Educator | 7 y.o. with CP | Western part of state | \*President | 1st term: ends 9/30/24 |
| Amie Reye | High school administrator |  | Central part of state | \*Vice President | 2nd term: ends 9/30/22 |
| Donald Mi | Parent, Attorney | 21 y.o. with ID | Northern part of state | \*Secretary / Treasurer | 2nd term: ends 9/30/23 |
| Judy Ea’e | Parent, Accountant | 2 y.o. with DD | Southern part of state | Member | 1st term: ends 9/30/24 |

*[End of slide content]*

*[Yolanda Lusane]:* The table shown on this slide is an example format of the information OSEP requires, to attest that your organization continues to be eligible for funding. A brief description of the number of board members with vacancies should precede the table. The table must include name, role, parent of child with disabilities, representation, board role, and term of office. The role includes the area or areas of expertise, which this person brings to the board. The parent's status must indicate both the age and disability of the child. The board should represent the entire geographical areas served by the project. The board role lists any offices this person holds with the organization. The term of office lists when this board member will leave their office, the board, or both.

## Slide 46 | Part 8: New in 2022

Outcomes:

* Grantees will have a greater understanding of what is expected of them in the annual reports.
* Grantees will feel more confident in completing and submitting their annual reports.

*[Yolanda Lusane]:* This is Part 8, New in 2022. My name is Yolanda Lusane, and I am the project officer for the Community Parent Resource Centers. The outcomes of this section are that grantees will have a greater understanding of what is expected of them in their annual reports and feel more confident in completing and submitting their annual reports. Next slide.

## Slide 47 | CPRC Cover Sheet—Top

[Screenshot of the 524 form, with **example** text filled in and highlighted in yellow.]

U.S. Department of Education

 Grant Performance Report Cover Sheet (ED 524B)

 *Check only one box per Program Office instructions.*

 [ X ] Annual Performance Report [ ] Final Performance Report

**General Information**

1. PR/Award #: H328C210000 2. Grantee NCES ID#: N/A

 *(Block 5 of the Grant Award Notification - 11 characters.) (See instructions. Up to 12 characters.)*

3. Project Title: Community Parent Center

 *(Enter the same title as on the approved application.)*

4. Grantee Name *(Block 1 of the Grant Award Notification.)*: Organization Name

5. Grantee Address *(See instructions.)* Only needed if address has changed

6. Project Director *(See instructions.)* Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Ph #: ( ) \_\_\_\_\_\_\_\_ - \_\_\_\_\_\_\_\_\_\_ Ext: ( ) Fax #: ( ) \_\_\_\_\_\_\_\_ - \_\_\_\_\_\_\_\_\_\_

 Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Reporting Period Information** ***(See instructions.)***

7. Reporting Period: From: 09/01/2021 To: 02/28/2022 (New Award)

*(end of slide content)*

*[Yolanda Lusane]:* This slide is a screenshot of an example cover sheet with crucial items highlighted to draw your attention. This slide shows the top third of the cover sheet. The same form will be used at the end of your project period for your final report. For this annual report, mark Annual Performance Report in the form's header.

On line number 1, enter your PR award number. All parent program PR award numbers begin with H328. On line number 2, enter N/A.

Next, complete line numbers 3 and 4. The information entered on line number 3 should match the information from your application. And the information entered on line number 4 should match the information found in block one of your Grant Award Notification or GAN.

Line number 5 should only be completed if your address has changed. Complete line number 6.

Line number 7 shows the reporting period covered by this report and should be completed with the following dates: From September 1st, 2021 to February 28th, 2022. The data used for this report will reflect the activities and outcomes from this indicated reporting period. Next slide.

## Slide 48 | Timelines

Work with your Project Officer to approve drafts by March.

* Drafts should be Word documents.

Submit Annual Performance Report to G5 by Date in Dear Larry Letter (usually first Friday in May).

* Remember extensions by OSEP approval only.

*[Yolanda Lusane]:* If your project officer has requested that you submit a Shell, please confirm the date that they are due. CPRCs need to submit their Shell to their project officer in Word format by March 11th.

The APR, based on the approved Shell, must be submitted in G5 by the date in the Dear Larry Letter which will probably be May 6th, 2022, the first Friday in May.

Please note: Extensions are only given when approved by OSEP. Next slide.

## Slide 49 | Last Slide

Thank you for all you do for children and families!

This concludes Part 8 and the webinar. If you have additional questions, we encourage you to contact your regional PTAC or project officer. Thank you for your attention today and all that you do to make the lives of our children and their families better.

**Center for Parent Information and Resources (CPIR)**—*February 2022*

*The CPIR is made possible through Cooperative Agreement Number H328R180005 between OSEP and the Statewide Parent Advocacy Network (SPAN). The contents of this document do not necessarily reflect the views or policies of the Department of Education, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government.*