

Dear Project Directors:

The purpose of this “*Dear Colleague*” letter is to advise you that all discretionary grantees are required to submit an Annual Performance Report (APR), as required by the Education Department General Administrative Regulations (EDGAR). The APR should demonstrate that your projects are making substantial progress toward accomplishing the goals and objectives of your original grant application or approved revision of your application, in order to receive continuation funding. The Grant Performance Report (ED 524B) form must be used for submission of the APR, electronically, through the Department’s e-Reports system.

The APR is normally due thirty days before the end of the project year. However, the submission date has changed to mid-August of each program year because of the Department’s requirement to obligate discretionary grant continuation awards by September 30<sup>th</sup> of each program year. Since the APR is due early, you must submit your supplemental (or interim) data by email within thirty days after your current budget year ends.

In addition to your annual performance reports, grantees are required to submit annual external evaluation reports, as indicated in your Grant Award Notifications. The external evaluation report should be submitted separately, through email, within thirty days after your current budget year ends. Also, ensure that your external evaluator signs the cover page of the evaluation report. Additional guidance and instructions for your external evaluation reports are provided in this letter under **Evaluation Report**.

Grantees are also required to submit Final Performance Reports (FPR) within 90 days after their project ends. These reports should be submitted using the ED 524B form, electronically, through the Department’s e-Reports system.

Enclosed you will find the forms and instructions for the U.S. Department of Education’s ED 524B. Please read the instructions and forms for the ED 524B carefully before completing and submitting your annual or final performance reports. If you have questions, concerning completing the forms, you should contact your program officer for guidance.

When accessing e-Reports/G5 for the first time you will need to register for an ID and password. You will receive a prompt asking if you are a Project Director. After answering “**yes,**” you will need to add your name and grantee DUNS number as they appear on your Grant Award Notification (GAN). If you are a new Project Director and your name does not appear on the GAN, you should contact your ED project officer.

### **The ED 524B (Grant Performance Report)**

- The ED 524B consists of a five (5) page form. All requested information must be reported in the appropriate section and page of the form according to the instructions.
- All financial data, including budget expenditure data and indirect cost information must be completed by your **Business Office**. Please allow sufficient time for your Business Office to provide you with this information in order for you to meet the performance report due date.

When completing the Budget Information section for the year 3 budget expenditures, grantees should include the following:

- Report budget expenditure data in items 8(a) and 8(b) of the ED 524B Cover Sheet. Please follow the instructions for completing items 8(a) and 8(b). **(NOTE: Line 8(c) of the ED 524B Cover Sheet applies to Final Performance Reports only).**
  - For budget expenditures made with NACTEP Federal grant funds, you must provide an explanation, if funds have not been drawn down from the G5 System to pay for the budget expenditure amounts reported in items 8(a) and 8(b) of the ED 524B Cover Sheet.
  - Provide an explanation, if you *did not* expend funds at the expected rate during the reporting period.
  - Describe any significant changes to your budget resulting from modification of project activities.
  - Describe any changes to your budget that affected your ability to achieve your approved project activities and/or project objective.
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- When reporting on your project objectives, *please remember that each of your performance measures must be aligned or associated with one of your approved project objectives [see Section A of the Project Status Chart].* Please note that when establishing this alignment between project objectives and performance measures, we do not expect you to redesign your approved grant application nor do we want you to make changes to your approved objectives or scope of work.
  - When reporting on quantitative performance measures, you are required to report on the targets (e.g., benchmarks or goals) that you established in your approved grant application for each year, as well as your actual performance data for the year. Quantitative performance measures data must be reported in a specific format in Section A of the Project Status Chart. Please read these instructions carefully.
  - If you have ED approved and documented changes to your originally approved grant application, then you will report the revised performance measure targets and actual performance data. You will need to explain any revisions in the Explanation of Progress section.
  - All grantees are required to provide updated GPRA data using the specific GPRA language provided to you by your project officer in the NACTEP Reporting Letter, earlier this year. For your convenience, the NACTEP GPRA Performance Measures are outlined below.
  - ED requires that a signed Grant Performance Report cover sheet (524B) be provided by email to your ED project officer **within three business days after the electronic submission of your APR.**

## Page 3

- When reporting on your project objectives, *please remember that each of your performance measures must now be aligned or associated with one of your approved project objectives [see Section A of the Project Status Chart]*. Please note that when establishing this alignment between project objectives and performance measures, we do not expect you to redesign your approved grant application nor do we want you to make changes to your approved objectives or scope of work.
- When reporting on quantitative performance measures, you are required to report on the targets (e.g., benchmarks or goals) that you established in your approved grant application for each year, as well as your actual performance data for the year. Quantitative performance measures data must be reported in a specific format in Section A of the Project Status Chart. Please read these instructions carefully.

## REPORTING

The performance reports must include—

- A comparison of actual accomplishments to the objectives established for the period. Describe any problems, delays, or adverse conditions that materially impair the ability of the project to accomplish its purposes, along with the reasons for slippage and an explanation of any action taken or contemplated to resolve the difficulties;
- A description of any favorable developments that will permit the project to accomplish its purposes sooner, at less cost, or more effectively than projected; and
- A statistical report covering quantitative analyses of –

The extent to which the project achieved its goals with respect to enrollment, skill proficiencies earned by completion, and placement of participants for the most recently completed training cycle(s) by gender and by programs of study for which instruction was provided.

If you have ED approved and documented changes to your originally approved grant application, then you will report the revised performance measure targets and actual **Government Performance Results Act (GPRA)**.

## Page 4

The report must also include the following performance measures established under the GPRA.

**At the secondary level:** An increase in the percentage of career and technical education students who-

- Attain academic proficiency, as demonstrated by meeting academic content standards and student academic achievement standards that meet challenging State defined academic standards for reading/language arts and mathematics;
- Attain career and technical skill proficiencies, including student achievement on technical assessments that are aligned with industry-recognized standards;
- Attain a secondary school diploma; and
- If a credential, certificate, or degree is offered by the State in which the project operates, in conjunction with a secondary school diploma, attain a proficiency credential, certificate, or degree in conjunction with a secondary school diploma.
- Are placed in—
  - ❖ Postsecondary education or advanced training;
  - ❖ Military service; or
  - ❖ Employment.

**At the postsecondary level:** An increase in the percentage of career and technical education students who—

- Enroll in a postsecondary education or training program;
- Attain challenging career and technical skill proficiencies, including student achievement on technical assessments that are aligned with industry-recognized standards;
- Attain an industry-recognized credential, a certificate, or a degree;
- Are retained in postsecondary education or transfer to a baccalaureate degree program;
- Are placed in--
  - ❖ Military service; or
  - ❖ Apprenticeship programs; and
  - ❖ Employment, including retention in employment and placement in a specific occupation or profession.
- Were referred to social or related services that were intended to improve the extent to which participants benefited from the project (e.g. referring a student to an agency that will help to obtain child care or health care, which would result in improved classroom attendance) or to prepare for or obtain employment.

## **Evaluation Report**

An Annual External Evaluation Report must be submitted within thirty days after your current budget year ends. An independent external evaluator must conduct the external evaluation and prepare the external evaluation report. Also, ensure that your external evaluator signs the cover page of the external evaluation report. This report should be submitted via email to your project officer.

### The External Evaluation Report must-

Be appropriate for the project and be both formative and summative in nature;

Include –

- Applicable performance measures for NACTEP;
- Qualitative and quantitative data with respect to-
  - (i) Academic and career and technical competencies demonstrated by the participants and the number and kinds of academic and work credentials acquired by individuals, including participation in programs providing skill proficiency assessments, industry certifications, or training at the associate degree level that is articulated with an advanced degree option;
  - (ii) Enrollment, completion, and placement of participants by gender for each occupation for which training was provided;
  - (iii) Job or work skill attainment or enhancement, including participation in apprenticeship and work-based learning programs, and student progress in achieving technical skill proficiencies necessary to obtain employment in the field for which the student has been prepared, including attainment or enhancement of technical skills in the industry the student is preparing to enter;
  - (iv) Activities during the formative stages of the project to help guide and improve the project, as well as a summative evaluation that includes recommendations for disseminating information on project activities and results;
  - (v) The number and percentage of students who obtained industry-recognized credentials, certificates, or degrees;
  - (vi) If available, the outcomes of students' technical assessments, by type and scores; and
  - (vii) The rates of attainment of a proficiency credential or certificate, in conjunction with a secondary school diploma;

Measure the effectiveness of the project including –

- (1) A comparison between the intended and observed results; and
- (2) A demonstration of a clear link between the observed results and the specific treatment given to project participants;
- (3) Measure the extent to which information about or resulting from the project was disseminated at other sites, such as through the grantee's development and use of guides or manuals that provide step-by-step directions for practitioners to follow when initiating similar efforts; and

**Page 6**

- (4) Measure the long-term impact of the project, such as, follow-up data on students' employment, sustained employment, promotions, and further/continuing education or training, or the impact the project had on tribal economic development or career and technical education activities offered by tribes.

If you have any problems while processing your grant performance report through e-Reports, G5 Hotline Staff is available to assist you at 1-888-336-8930, between the hours of 8:00 am – 6:00 pm, Eastern time, Monday-Friday.

Please feel free to contact Gwen Washington at [gwen.Washington@ed.gov](mailto:gwen.Washington@ed.gov) or Linda Mayo at [linda.mayo@ed.gov](mailto:linda.mayo@ed.gov) if you have any questions regarding this letter or the requirements of the ED 524B form.

Sincerely,

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