New Jersey Department of Education, Office of School Facilities Planning

LRFP Major Amendment Guidelines

In accordance with P.L. 2007, c. 137, each school district must amend its Long-Range Facilities Plan (LRFP) at least once every five years, which is referred to as a "Major Amendment." In addition, a district's LRFP must be current and consistent with school facilities project applications. If a district is planning to submit a project application, and the most recent LRFP approval letter was issued more than five years ago, a Major Amendment to the LRFP must be submitted and approved prior to project approval.

A Major Amendment includes updates in the web based LRFP Reporting System and the email submission of supporting documents to the Office of School Facilities Planning (OSF). The amount of time and effort needed to amend the LRFP will vary for each district. Unlike first approval in the LRFP system, amendment tasks focus on review and editing. Therefore, the extent to which the existing inventory in the LRFP system reflects current conditions and is proposed to be altered is the major determinant of the amendment effort. In general, LRFPs in districts with stable enrollments and no major past or proposed inventory changes can quickly update their plans by using the DOE-provided enrollment projection and making minor edits in the LRFP system. In contrast, districts with significant facilities changes since their last LRFP approval or that have inadequate student capacity typically need more time to amend their LRFP. If districts need to quickly comply with five-year reporting requirements for a time-sensitive project application, they may elect to submit an LRFP amendment that focuses on capital maintenance and the imminent project and enter "placeholder" inventory actions in the LRFP system pending more detailed analysis and consensus-building for a subsequent amendment submission.

Accessing the LRFP Reporting System
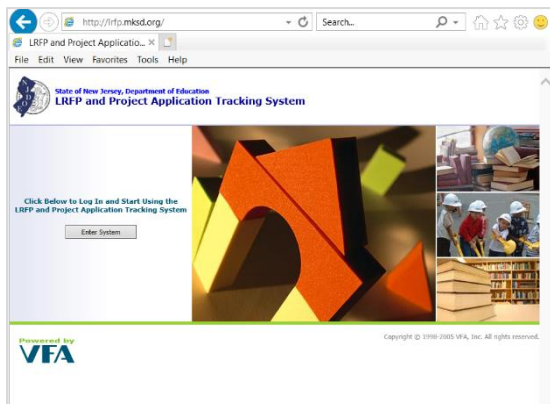
School district administrators can email LRFPsubmission@doe.nj.gov to request account information to access the LRFP Reporting System. Do not use the help email link found in the LRFP system. Each school district is responsible for creating and assigning additional user accounts; the OSF will not issue account information to consultants. Refer to the District Administrator Instructions for guidance on how to create new accounts and delete the accounts of former staff and consultants who should no longer have access to the district's LRFP data.

If data in the LRFP reporting system cannot be edited (text appears grey and records cannot be edited), the LRFP is "locked." To have the data unlocked for editing, complete and email the LRFP System Data Unlocking Request Form (PDF) to LRFPsubmission@doe.nj.gov.

The Department's OSF LRFP web page has links to helpful documents if you are unfamiliar with the LRFP Reporting System. For detailed guidance on how to navigate and enter information in the LRFP system, refer to the LRFP Tutorial and Addressing the LRFP Data Check Report. The Office of School Facilities Planning can also be contacted for assistance at LRFPsubmission@doe.nj.gov. A district administrator should be included on all emails.

Amendment Completion Instructions

Carefully follow the step-by-step instructions to ensure a complete and approvable submission.

1. **Update the LRFP name in the LRFP tab of the LRFP System to reflect the new amendment, and request the data be unlocked for editing if needed.**

   In the LRFP tab, List View, identify and select the previously submitted LRFP record, which may have a status of "Deficient," "Amendable," "Submitted," or "Approved." In the Detail View, rename it with the current year and type of amendment, such as "2022 Major Amendment." **DO NOT create a new LRFP record or use a previously created LRFP record with a status of "Work in Progress."** Although the LRFP system allows the creation of multiple LRFP records to test different scope of work scenarios, only the previously approved LRFP record can be submitted for an amendment. School grade alignments and inventory actions cannot be transferred from one LRFP record to another and must be re-entered if the wrong LRFP record is edited. Email the OSF before proceeding if you are unsure which LRFP record should be updated for the amendment.

   If the LRFP status is "Submitted" or "Approved," complete and email the LRFP System Data Unlocking Request Form to LRFPsubmission@doe.nj.gov to have the data unlocked for editing. LRFP system account information can also be requested on this form.

   > *LRFP System Note:* If the LRFP is unlocked (has a status of "Deficient" or "Amendable") but data remains greyed and cannot be edited, click on "Edit Reasons" in the LRFP Detail View, check all the boxes, and save. (This is also required if a school record is added after the LRFP is unlocked.)

2. **Determine the enrollment projections to be used in the LRFP.**

   Districts planning a major amendment must request the Department's standard cohort survival enrollment projection and include it as a supporting document in the submission. The projection is based on ASSA enrollments from the last six years. Special education enrollments include all classified students as reported in the ASSA. These students can be accommodated in general or dedicated special education classrooms in the LRFP.

   In certain cases, the Department's standard cohort survival enrollment projection may produce a questionable forecast if the district experienced temporary or atypical enrollment impacts over the last six years or anticipates significant, imminent demographic change. If the district believes the Department's standard projection does not reliably forecast enrollments for inclusion in the LRFP, it may propose an alternate projection for consideration. Examples of events that may require adjustments to a standard cohort survival projection include temporary enrollment fluctuations due to

the COVID pandemic, the closing or opening or a charter or private school, or new housing construction that significantly exceeds historic rates.

Email Susan Kutner, Director of the Office of School Facilities Planning, to discuss the viability of an alternate projection *prior* to initiating a demographic study or incorporating the results in the LRFP amendment.

> *LRFP System Note:* The LRFP System no longer provides historic enrollments or a standard cohort-survival enrollment projection. Therefore, all references to existing enrollments and existing school grades in the LRFP System and automated reports should be ignored.

3. **Enter the selected enrollment projection year from the Department's standard projection or an approved alternate projection in the Enrollment tab of the LRFP System.**

Create a new projection record in the Enrollment section of the LRFP system and enter the "Proposed Enrollments" from the enrollment projection submitted as a supporting document. **The entered data must exactly match one year of the projection and be at least three years into the future.**

> *LRFP System Notes:* The existing enrollment and projection years displayed in the Enrollment tab of the LRFP System will be zero in most cases and cannot be updated. The "Proposed Enrollments" fields for the entry of the offline projection can be found at the bottom of the screen. Also, special education students represent all classified students and not self-contained students ("SCSE") as represented in the LRFP website.

4. **Update the School List in the Inventory tab of the LRFP system.**

Update the list of district schools and the 3-digit DOE ID codes to coordinate with the New Jersey School Directory, and identify potential new schools. **The LRFP will not be approved if the existing school list does not match the school directory.** (See Step 5, second bullet under "common reporting mistakes," if two or more schools share one building.)

> *LRFP System Note:* Existing and potential school records cannot be deleted from the LRFP system once saved. Therefore, **invalid records should be renamed "---" for easy identification and dismissal.**

5. **Update existing and proposed Sites, Assets, and Rooms in the Inventory tab of LRFP system.**

Review the *School Asset Report*, *Site Asset Report*, *Existing Room Inventory Report*, and *Proposed Room Inventory Report,* generated in the Report section of the LRFP system, to identify (1) changes to the existing inventory since the last LRFP amendment, (2) previously proposed "potential" inventory that was completed or is no longer a district objective and should be deleted, and (3) "potential" inventory to be added as part of the proposed LRFP amendment.

Please note that the identification of proposed inventory is a two-step process in which the proposed site, asset, or room is named in the Inventory section of the LRFP system and the action to achieve the change is noted in the LRFP/Edit Actions section. Also, **previously identified potential inventory that is now existing must be deleted and re-entered as existing** since "status" cannot be changed in the LRFP system.

Common reporting mistakes are as follows:

- Contiguous sites should be represented as one site regardless of the number of buildings on the site, different functions, different schools served, etc.

- Rooms in a single building should be grouped together under one asset regardless of the number of schools served. If a building serves more than one school, add "see School <x>" to the name of the school not selected as the "school served."

- A building addition (potential rooms with new construction actions) should be listed under the existing asset.

- Facilities used by the entire school district, such as administration buildings, should not be associated with a school. (The "schools served" field for the asset, accessed through the site menu, should display "none selected.") Assets that are not associated with a school are listed at the beginning of the *School Asset Report*.

6. **Update inventory actions in the LRFP tab of the LRFP system as needed to reflect future projects.**

Potential sites, assets, and rooms identified in the Inventory tab are not included in the LRFP unless assigned an inventory action in the LRFP section. Refer to the *School Asset Report*, *Site Asset Report*, and the *Proposed Room Inventory Report* to determine required updates. If the district elects to identify proposed systems work (capital maintenance) in a supporting document, edits in the LRFP system are not required. (See Step 7.) To quickly eliminate all previously assigned room inventory actions, select "no action" at the asset level and save.

LRFP System Notes: **An error message will appear when "Edit Actions" is clicked in the LRFP tab, Detail View.** Acknowledge the error message by clicking "ok" and proceed to the Action menu on the left side of the screen to make a selection.

7. **Update capital maintenance ("systems") in the Inventory and LRFP tabs or compile a spreadsheet to submit as a supporting document.**

The *Systems Action Report* provides an overview of proposed capital maintenance currently represented in the LRFP System. **The district may either update the data in the LRFP system or submit a supporting document describing proposed capital maintenance.** If the district elects to submit capital maintenance in a supporting document, LRFP system data will be ignored. Inventory actions, such as new construction, reconfiguration, demolition, etc., must be represented in the LRFP system and must not be included in the capital maintenance supporting document.

If reporting capital maintenance in the LRFP system, the work must be identified in the Inventory section and selected for inclusion in the LRFP tab, Edit Actions section.

LRFP System Note: "Systems" records can only be deleted in the Inventory section if not included in the LRFP. Proposed system work can be eliminated from the LRFP by de-selecting the work for inclusion in the LRFP/Edit Actions section. The record does not have to be deleted from the Inventory section for the work to be omitted from the LRFP.

8. **Select the updated enrollment projection and distribute Proposed Enrollments among the schools in the LRFP section of the LRFP system.**

   In the Grade Alignment section of the LRFP Detail View screen, select the new enrollment projection record created in Step 3 from the pull-down menu and save to update the numbers in the table.

   In the Grade Alignment table, distribute the proposed enrollments among the schools. The sum of the proposed school enrollments must equal the district-wide projections as calculated on the bottom of the screen, and the proposed school capacities must coordinate with the proposed enrollments. The *LRFP Data Check Report*, generated in the Reports section of the LRFP reporting system, identifies coordination issues, and the *FES and District Practices Capacity Report* provides the calculated capacities. In some cases, school grade alignments, district practices capacity represented in the room inventory, and/or inventory actions may require adjustment for coordination. (See Addressing the LRFP Submission Data Check Report for detailed instructions.)

   Surplus capacity is typically acceptable if the district does not propose new construction that increases capacity for the grade levels served and/or provides adequate documentation explaining why existing surplus capacity cannot be used to accommodate enrollment needs or existing rooms reassigned to meet program accommodation objectives. Deficient capacity will only be approved if the shortage is less than the maximum capacity without application of the FES utilization rate. However, this planning approach is discouraged due to its limited flexibility to accommodate enrollment fluctuations.

9. **Generate and review the Data Check Report.**

   The *LRFP Data Check Report*, generated in the Reports tab of the LRFP system, highlights potential reporting errors and critical issues requiring action for LRFP approval. The guidance document, Addressing the LRFP Submission Data Check Report, provides detailed descriptions and corrective actions for each data check.

   The data checks listed below require corrective actions or supplemental supporting documents for LRFP approval; all others are provided for informational purposes only. Those addressing existing enrollments should be disregarded.

   - **#4/Enrollment-Grade Alignment Coordination:** Must be corrected.

   - **#5/Proposed Schools and Enrolments** and **#7/Proposed Schools and Instructional Buildings:** Only invalid records ("---") and schools that share buildings with other schools should be cited.

- **#9/Enrollment and Capacity Coordination:** Enrollment and capacity coordination is one of the major review points of the LRFP. If a school is cited for deficient "District Practices" capacity, the LRFP is still approvable if the deficiency is less than the maximum capacity (100% utilization) calculated in the *Proposed Rooms Inventory Report.* Otherwise, the district must redistribute the proposed school enrollments and/or edit the room inventory and actions to increase capacity. If a school is cited for surplus capacity and new construction is not proposed for the grades served by the school for any district building, no action is needed. If new construction is proposed at the cited school or another school serving the same grade levels, the district must redistribute proposed school enrollments, eliminate proposed new capacity, and/or submit a statement explaining why existing capacity cannot be used and/or classroom space reassigned to meet program and capacity needs.

- **#10/Room-Grade Alignment Coordination:** Must be corrected except for pre-kindergarten special education classrooms.

- **#12/Grossing Factor Spaces:** Must be corrected.

- **#16/Room Inventory:** Must be corrected.

- **#19/Reconfiguration Actions:** Must be corrected.

- **#20/FES Compliance:** The district must either increase proposed square footage or submit a statement verifying that the building appropriately accommodates the curriculum and programs.

10. **Electronically submit the LRFP.**

    If steps 1 through 8 are complete and no critical errors are cited in the LRFP Data Check Report, the district can click the "Submit" button in the LRFP section of the LRFP system.

    > *LRFP System Note:* **In some cases, the submit function will not work and a synchronization error message will appear. In these cases, the district should ignore the error and proceed to Step 11.** Since the receipt of supporting documents signals a complete submission, it is not necessary to contact the Department if the LRFP cannot be electronically submitted.

11. **Assemble supporting documents.**

    Assemble the documents listed below for each major amendment regardless of whether the information has changed from the prior LRFP submission.

    - **LRFP Major Amendment Submission Form:** Download and complete the LRFP Major Amendment Submission Form.

    - **Enrollment Projection**: The submission must include the standard NJDOE cohort-survival enrollment projection and an approved alternate projection if used in the amendment.

    - **Board of Education Resolution:** The resolution must authorize submission of the LRFP amendment.

- **District Map:** The map should display district boundaries and the location of each existing and proposed school building.

- **Existing Site Plans:** The site plans should minimally show site boundaries, building footprint(s), PE/recreation fields, and hard surfaces. Google maps are acceptable if site boundaries are added.

- **Existing Floor Plans:** The floor plans should be to scale but can be single-line diagrams. Room names should coordinate with the room inventory entered in the LRFP system. Proposed floor plans are not required but will be accepted.

- **Proposed Systems/Capital Maintenance**: If not entered in the LRFP system, submit a list of proposed capital maintenance that includes a description of the proposed work, deficiency to be addressed, estimated costs, and anticipated year of completion, Please note that systems work identified in the LRFP system will <u>not</u> be considered part of the approved LRFP amendment if this supporting document is submitted.

- **FES Waiver:** If Data Check #20 applies, the district must submit a statement verifying that the buildings are able to adequately support the curriculum and programs.

12. **Email a full set of supporting documents to the Office of School Facilities Planning after all LRFP system updates are completed.**

    The emailing of supporting documents signals to the DOE that the district's LRFP amendment is complete and ready for review. DO NOT email a partial set of documents or before LRFP system updates are complete unless directed otherwise. The date of the email containing the complete set of supporting documents will serve as the official submission date of the LRFP amendment (not the date of the electronic submission in the LRFP reporting system).

    The documents should be emailed to [LRFPsubmission@doe.nj.gov.](mailto:LRFPsubmission@doe.nj.gov) Receipt will be acknowledged by an automated response that provides an estimate of the review time.

It is highly recommended that districts maintain all LRFP amendment supporting documents and download LRFP reports for future reference. These documents may not be accessible in the LRFP System in the future.