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." The amendment includes updates on the web-based LRFP reporting system and the submission of supporting documents to the Office of School Facilities Planning (OSF).

> **The district's LRFP must be consistent with an application for a school facilities project. If your district is planning to submit a project 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.**

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 center more on review and editing. Therefore, the degree to which existing inventory in the LRFP system reflects current conditions and the scope of future changes are major determinants 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 with the completion of the enrollment projection template, minor edits in the LRFP system, and the submission of supporting documents. In contrast, districts with significant facilities changes since their last LRFP approval or inadequate student capacity typically need more time to amend their LRFP. In these cases, districts may elect to submit an amendment focused on capital maintenance and/or an imminent project and enter "placeholder" inventory actions to address capacity, if needed, pending more detailed analysis for a subsequent amendment.

District administrators can email the 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.

The following summarizes district reporting requirements for a Major Amendment. The DOE's OSF LRFP web page offers helpful documents if you are unfamiliar with the LRFP reporting process and 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 email correspondences.

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

    In the LRFP section, identify the previously submitted LRFP record, which may have a status of "Deficient," "Amendable," "Submitted," or "Approved." In the Detail View, rename the previously approved LRFP with the current year and type of amendment, such as "2021 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 submitted LRFP can be submitted for an amendment. Data 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 "Approved," complete and email the LRFP System Data Unlocking Request Form to the LRFPsubmission@doe.nj.gov to have the data unlocked for editing. LRFP system account information can also be requested on this form. If the LRFP status is "Submitted," users with district administrator privileges can unlock the LRFP themselves by clicking the "Deficient" or "Amend" button near the top of the screen.

2. **Complete a standard cohort-survival enrollment projection using the DOE MS Excel template or request a completed projection from the DOE.**

The LRFP system no longer updates historic enrollments or provides a standard cohort-survival enrollment projection in the Enrollment section of the website. Therefore, **an enrollment projection must be submitted as a supporting document and all references to existing enrollments and existing school grades in the LRFP system and automated reports should be ignored**.

Minimally, all districts must submit a standard cohort-survival enrollment projection using the Department's template. The historic enrollments entered in the template must match either ASSA reports or NJ Smart and not a combination of the two. The Office of School Facilities Planning will provide a completed standard cohort-survival enrollment projection using ASSA data upon request. Please include the district name and county in the email request. A district administrator must be copied if the request is submitted by a consultant.

Districts may also submit an alternative methodology for consideration. However, it is recommended that the projection be emailed to Susan Kutner, Director of the Office of School Facilities Planning, for review prior to LRFP completion and submission.

3. **Enter Proposed Enrollments in the Enrollment section 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.

The existing enrollment and projection years displayed in the LRFP system, which will be zero in most cases, cannot be updated and should be ignored. The Proposed Enrollments fields to be edited can be found at the bottom of the screen.

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

Update district schools and the 3-digit DOE ID codes to coordinate with the district's most recent ASSA report and identify potential new schools. (The New Jersey School Directory also provides an official school list.)

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 section of LRFP system.**

Review the *School Asset Report*, *Site Asset Report*, *Existing Room Inventory Report*, and *Proposed Room Inventory Report,* which are 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.

The existing inventory will be imported into future LRFP system updates. Therefore, it is worthwhile to correct reporting mistakes. **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 section of the LRFP system as needed to reflect future projects.**

Potential sites, assets, and rooms identified in the Inventory section 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 systems, or capital maintenance work, in a supporting document, no edits in the LRFP system are required. (See Step 10 below.)

An error message will appear when "Edit Actions" is clicked in the LRFP section. Acknowledge the error message by clicking "ok" and proceed to the left toolbar to make a selection.

7. **Update capital maintenance ("systems") in the Inventory and LRFP sections 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. **The district may either update the systems 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, Edit Actions section. 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 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.)

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

   The *LRFP Data Check Report*, generated in the Report section of the LRFP system, highlights potential reporting errors and critical issues requiring action for LRFP approval. The Addressing the LRFP Submission Data Check Report guidance document provides detailed descriptions and potential corrective actions for each data check. A summary of critical data checks requiring action for LRFP approval are listed below. All other data checks are provided for informational purposes to promote reporting accuracy. **Please do not submit the supporting documents for an amendment without reviewing the *Data Check Report* and resolving critical issues.**

   - **#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:** This 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 or edit the room inventory and/or actions. Generally, if a school is cited for surplus capacity and no new construction is proposed districtwide for the grades served by the school, 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.

   - **#10/Room-Grade Alignment Coordination:** Must be corrected except for PKSE.

   - **#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 1-8 are complete and no critical errors are cited in the Data Check Report, the district can click the "submit" button in the LRFP section of the LRFP system. In some cases, the submit function will not work. In

these cases, the district should ignore the error and proceed to Step 11. Since the receipt of supporting documents signals a complete submission, do not contact the DOE if the LRFP cannot be electronically submitted.

11. **Email a full set of supporting documents to LRFPsubmission@doe.nj.gov after all LRFP system updates are completed.**

The emailing of the supporting documents listed below 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. The DOE will acknowledge the submission and provide reviewer information. **LRFP reviews may take up to 60 days from the date of a complete submission.**

Submit the documents listed below with each major amendment regardless of whether the information has changed from the prior LRFP submission. Districts can download supporting documents from the LRFP reporting system and resubmit if the document does not require updating.

- **Enrollment Projection**: The projections should include the completed DOE cohort-survival enrollment projection in MS Excel and alternate projections in PDF format as applicable.

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

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

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

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

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