

Preliminary LRFP Guidelines

**for the new Long Range Facilities Plan (LRFP)
and Project Application System**



Prepared by
Office of School Facilities, New Jersey Department of Education
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Introduction

The Department of Education will be transitioning to a new web-based Long-Range Facilities Plan (LRFP) reporting system by the end of 2014. The new system is necessary to upgrade dated operating systems, address changes in educational laws, regulations, and school facilities funding, and streamline reporting processes based on user feedback. The system update also affords the opportunity to incorporate a project application and approval component, anticipated for early 2015 release, which will directly link and coordinate the district's LRFP and facilities inventory with project applications as they move through the approval process. Project application reporting requirements, including supporting documentation, will be similar to existing requirements.

The purpose of this document is to introduce the LRFP component of the new LRFP and Project System so that districts can begin planning and preparing for their LRFP amendment prior to the system's release. Specifically, the guidelines provide an overview of:

- **Major LRFP system changes and enhancements** (page 2)
- **LRFP status at system release, including data migration from current system** (page 3)
- **New and updated reporting requirements** (pages 4-7)
- **Tasks required for first LRFP amendment submission** (pages 8-10)

The incorporation of the project application component in the new system necessitates that each district update its LRFP with a major amendment addressing all reporting requirements, regardless of current LRFP approval status, in order to submit a project application after the new system is released. If LRFP approval was issued within the last five years *and* no projects are planned for Department submission, the district is not required to immediately amend its LRFP. However, **each district should carefully read these guidelines regardless of LRFP status since select tasks must be completed prior to the discontinuation of the current LRFP system.**

Overview of System Enhancements

Organizationally, the new LRFP and Project Application System is similar to the existing LRFP system, with School, Inventory, Enrollment, LRFP, and Project tabs remaining the principal organizational structure. With a few exceptions, LRFP-related reporting requirements also remain the same.

In general, enhancements to the system pertain to simplifying the articulation of proposed work and the addition of the project component so that all LRFP and project application requests, submissions, and approvals are managed online and within the same system. Potential projects identified in the LRFP will be selected for advancement in the project section, with progress tracked through their completion.

Major enhancements and changes to the LRFP component include:

- The display of critical instructions and data calculation checks on data entry screens
- The utilization of the County District School Information System (CDS) for school information and district contacts
- Editable inventory lists and the identification of inventory and potential actions on the same screen to reduce navigation time
- An automated updating of existing inventory based on project completion that will keep inventory current at all times regardless of amendment status
- The provision of a more accurate system generated cohort-survival enrollment projection using ASSA and preschool private provider data
- The “bundling” of proposed inventory actions and capital maintenance into projects, with projected budgets and other reporting requirements identified for the entire project scope rather than for each action
- District ability to upload supporting documents, eliminating the need to submit paper copies for many of the reporting requirements
- The archiving of all LRFP and project documents, including approval letters, district-submitted supporting documents, and automated system reports, in one location

LRFP Status at System Release

When a district initially accesses the new system, its LRFP, regardless of its approval status in the current system, will be “amendable” with all data unlocked. Due to the extensive system redesign to include a project application component, the first district submission using the new system must be a major amendment that fulfills all five-year reporting requirements. However, districts will only be required to immediately work on an amendment submission if their current LRFP approval was issued more than five years ago or if they plan to submit a project.

> DATA MIGRATION

Existing site, asset, and room inventory data will be migrated into the new system. Due to system enhancements, existing and potential schools, potential inventory, inventory actions, and system work cannot be transferred.

Since existing schools will be linked to the Department’s CDS system, users will no longer be able to alter school names or DOE codes within the LRFP reporting system. Users will still be able to name potential schools, which will be assigned a temporary number until an official school number and name are assigned.

> SUPPORTING DOCUMENTS AND AUTOMATED REPORTS

Archived reports and supporting documents will not be transferred to the new system or saved by the Department. Each district will be responsible for downloading these documents from the existing system for future reference. This is particularly important if an amendment is anticipated to incorporate much of the same work as proposed in the previously approved LRFP. Reports such as “Proposed Rooms Inventory Report” and “Systems Detail Report,” which list proposed inventory actions, are critical in recreating a LRFP.

New or Updated LRFP Reporting Requirements

The following lists new or altered LRFP reporting requirements. “New” reporting fields must be addressed with the district’s first LRFP amendment using the new system. “Updated” reporting fields with migrated data may require editing depending upon whether the expanded option lists are applicable.

| Data Field Name | New | Updated | Description |
|---|-----|---------|--|
| Schools | | | |
| School Name and DOE Code Number | | X | All existing school names and numbers will be linked to the County District School Information System (CDS) and will not be editable in the LRFP and Project Application System. Users can continue to identify potential schools similar to the existing system. The system will assign a temporary DOE school code to the potential school until the district applies for a new school code and the CDS system is updated. |
| Impacted School Sending Areas | X | | For potential schools, select from a list which existing schools will be impacted from the creation of the new school. If no school sending areas are impacted, identify proposed source of student enrollments from a list (new housing development, new/expanded programs, preschool community providers, out-of-district placements, other). |
| Inventory > Sites | | | |
| Ownership | | X | Site ownership options have been expanded to include district-owned/leased to charter school, district-owned/leased to outside agency, and other. |
| Use | X | | Select site use from a list (educational, non-educational, mixed use, recreation, undeveloped, non-district use, offline/unassigned, other) |
| Location Description | X | | Describe site location, such as “First and Main Streets.” (Replaces address, which will only be associated with buildings.) |
| Environmental or Developmental Restrictions | X | | Select “yes” or “no” as to whether site has legally recognized environmental or development restrictions. If “yes” is selected, describe restrictions. |
| Action | | X | Site actions for existing and potential sites have been expanded to include expand, partial disposal, whole disposal, land swap, lease to charter school, lease to outside agency, acquire (purchase or lease), and purchase existing leased site. |
| Total Proposed Acres | X | | If site action of expand, partial disposal, or land swap is selected, note total proposed acres after completion of proposed action. |

| Data Field Name | New | Updated | Description |
|--|-----|---------|---|
| Inventory > Assets | | | |
| School(s) Served | | X | Multiple schools, rather than only one school, can now be selected from a list and be associated with an asset. (Due to the use of the Department's CDS system for school names and DOE codes, all school associations will have to re-selected in the new system.) |
| Ownership | | X | Asset ownership options have been expanded to include district-owned/leased to charter school, district-owned/leased to outside agency, and other. |
| Asset Type | | X | The asset type list has been expanded to include misc. site. |
| Building Type | | X | The building type list has been expanded to include adult education and other. |
| Building Age and Square Feet | | X | For each building, note original year of construction and gross square feet and year of each addition and gross square feet as applicable. (Sum of square footages will be compared to room inventory square feet for verification.) |
| Year of Last Major Renovation | X | | Indicate year of last major renovation for each building wing with different construction dates. |
| Description of Prior Major Upgrades | X | | Describe major renovation projects. |
| Inventory > Rooms | | | |
| Room Category | | X | The room category list has been expanded to include "non-school use." This addresses district offices and other functions that may be accommodated in an instructional building that do not serve the associated school. |
| Room Type: FES Capacity Generating | | X | Special education room type options have been consolidated for grades PK-8. |
| Room Type: Non-School Use | X | | The room type list for the new "Non-School Use" room category includes district offices/support, leased to charter school, leased to outside agency, and vacant/unassigned |
| Support Spaces | | X | Indicate quantity and net square feet per room for each support space type rather than sum of square feet for each type. |
| Inventory > Capital Maintenance (previously "Systems") | | | |
| Building Location | X | | Based on construction dates identified for asset, select building wing in which proposed work would be located. |

| Data Field Name | New | Updated | Description |
|--|-----|---------|--|
| Approximate or Average Age of Affected Components | X | | Note approximate or average age of building component(s) to be repaired or replaced. |
| Description of Deficient Condition | X | | Provide a brief description of deficiency to be addressed. |
| Scope of Work Classification | | X | Select site improvements, roof, building skin, structure, elevator, doors, interior finishes, furnishings and equipment, toilet rooms, stairs/ramps, HVAC/plumbing, electrical systems, communications and security, or multi-system renewal from a pull down list. (Replaces multiple check boxes.) |
| Building Code Compliance | X | | Indicate whether the proposed work addresses accessibility, hazardous materials, life safety, or general building code issues. |
| Enrollment | | | |
| Offline Projection Used for Proposed Enrollments | X | | Select yes or no as to whether system generated cohort survival enrollment projection will be used for the LRFP amendment. |
| Reason for Offline Projection; Projection Methodology Description; Historic Enrollment Data Source | X | | <p>If not using the system-generated projection, describe:</p> <ul style="list-style-type: none"> ■ Reason for choosing an alternative methodology ■ Alternative methodology proposed ■ Historic enrollment data source. <p>(Alternate projection must be uploaded for review.)</p> |
| Proposed Eligible Preschool Students | X | | Enter number of preschool students eligible for state funding for consideration in the Functional Capacity calculations. |
| Projected PK Students with Private Providers | X | | Enter the number of preschool students projected to be accommodated with private providers. This number will be deducted for the projected preschool population. |
| LRFP | | | |
| Potential Project Name | X | | Name potential project, such as "PS 1 Gym Addition." (Name should be brief but descriptive.) |
| Potential Project Type | X | | Select educational, non-educational, or site/non-instructional acquisition. |
| School Name | X | | Select applicable school from list. |
| Site Name | X | | Select site with assets associated with selected school from list or site with no school assets. |
| Asset Name | X | | Select asset(s) associated with selected school or site from list. |

| Data Field Name | New | Updated | Description |
|-------------------------|-----|---------|---|
| Estimated Project Start | | X | Select 0-2 years, 3-5 years, or 5+ years. (Replaces identification of specific year.) |
| Estimated Cost | | X | Cost is entered for all inventory and capital maintenance actions included in potential project. |
| Temporary Facilities | X | | Indicate whether potential project requires temporary facilities in advance of new construction, including short term leases, and temporary classroom units but excluding swing space required during construction. (Swing space needs will be entered in project section.) |
| Scope Overview | X | | Select scope of potential project from a series of lists, such as land acquisition, new construction, rehabilitation, etc., similar to those found in the current project application. |
| Scope Detail | X | | Select site, asset, and/or room inventory actions and/or capital maintenance work previously identified in the Inventory section for inclusion in the potential project. (An inventory action can only be assigned to one project.) |

Tasks for Completing First LRFP Amendment on the New System

LRFP amendment requirements include updating existing inventory data and entering conclusions concerning projected enrollments and the disposition and development of sites, buildings, and program spaces. It is up to the district to determine the type of analysis needed to reach these conclusions. Successful plans consider educational adequacy and capital maintenance needs as well as community input. The amount of time required to complete an LRFP amendment will vary depending upon district size, facilities objectives, and the status of the previously approved LRFP. Districts that anticipate major facilities improvement projects or school grade realignments should begin the planning process immediately in order to allow adequate time for data collection, analysis, and stakeholder consensus-building.

It is imperative that each district download supporting documents and automated reports from the existing system prior to the transition. Notification will be provided prior to system shutdown. After the existing system is taken offline, these documents cannot be retrieved. **If your district will not be amending its LRFP until the new system is released, it is recommended that all LRFP documents (reports, supporting documents, and approval letters) be saved now.** If your district is currently editing its LRFP, wait until notification is given to generate and save reports. Email project.app@doe.nj.gov if username and password information to access the current system is needed.

Districts will minimally be required to complete the tasks described below for LRFP amendment submission. The major efforts center upon reviewing and updating migrated existing inventory and identifying potential inventory actions and projects.

1. Schools

- a. Existing Schools: The school list will be linked to the Department's County District School Information System (CDS) and cannot be edited in the LRFP system. However, although school changes must be processed through the CDS system, proposed changes are still identified in the LRFP.
- b. Potential Schools: Name "potential" schools that the district plans to include in its LRFP amendment. Potential schools should only be identified for student populations for which the district plans to request a new DOE school code number upon project completion.

2. Inventory (Sites, Assets, Rooms, Capital Maintenance)

- a. Existing Sites: Review and update migrated data, including new reporting requirements (see pp. 4-5). Identify proposed work, referred to as actions, for each site as applicable.

- b. Potential Sites: Name potential sites to be included in the LRFP and assign actions as applicable.
- c. Existing Assets: Review and update migrated data, addressing new reporting requirements (see p. 5), and identify potential project actions as applicable. Required edits include identifying the school(s) that each asset serves. (This information was not migrated from the existing system in order to utilize the CDS system.) Also, add TCUs and other temporary buildings to the asset inventory that are needed to meet capacity and/or program needs in advance of a permanent solution, excluding temporary facilities being used, or proposed to be used, as swing space during a construction project.
- c. Potential Assets: Name potential assets to be included in the LRFP and assign actions as applicable.
- d. Existing Rooms: Review and update migrated data, including new reporting requirements (see p. 5) and identify actions as applicable. A new room category “Non-School Use” has been added. This minimally requires the editing of district offices and other rooms not serving school functions that are located within a building associated with a school.
- e. Potential Rooms: Name potential rooms to be included in the LRFP and assign applicable action. In select cases, such as new construction or whole building demolition, actions assigned at the asset level will be automatically applied to all rooms associated with that asset.
- d. Capital Maintenance (previously called “Systems”): Identify proposed capital maintenance work for each asset. No previously entered information will be migrated into the new system due to a simplification of reporting requirements (see p. 6).

3. Enrollment

- a. District Projection: Review the automated district-wide cohort-survival enrollment projection using ASSA data. Either accept this projection or upload an alternate projection for DOE review. (In order to create more viable projections, special education populations are represented as reported rather than using a formula to estimate self-contained students as in the current system. Users can also edit projected preschool enrollments without submitting supporting documentation.)
- b. School Enrollments: Distribute the projected district enrollments among the schools that will be included in the district’s LRFP, differentiating between mainstreamed and self-contained special education students.

4. LRFP

- a. Potential Projects: Group proposed inventory actions for each school into potential projects for inclusion in the LRFP. This is the most significant change from the current LRFP system. This change greatly reduces data entry since budget, anticipated project start year, and other data are only entered for each potential project rather than for each individual inventory action. This new process also supports the selection of potential projects identified in the LRFP in the project application section of the website.
- b. Supporting Documents: Upload required supporting documentation. (Users no longer generate transmittals and mail paper copies of documents as in the current system.) For the first amendment utilizing the new system, all supporting documents must be submitted regardless of whether or not they are updated from the last submission. This includes:
 - Board of Education resolution approving LRFP submission
 - Enrollment projection (*if system project is not used*)
 - Evidence of submission to local planning board
 - District map with existing and proposed school locations
 - Existing site plans
 - Existing floor plans
 - FES waiver request (*if proposed instructional buildings do not meet FES minimum requirements*)
- c. Data Check Report: Generate and review the Data Check Report for reporting errors. This report highlights major issues that may prevent LRFP approval but is not comprehensive in identifying deficiencies.
- d. Submit Amendment: After all electronic reporting requirements are completed, the Data Check Report is reviewed, and required supporting documents are uploaded, click the “submit” button to signal readiness for DOE review.