TOWN of PORTOLA VALLEY

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July 8, 2021

Virtual Meeting and Submittal Process for Planning Projects

The Town's Planning Department has transitioned to an all electronic meeting and submittal process for new Planning permit applications. If you have reached this point in the process, you have likely already had email communications with staff and a Virtual Counter Meeting. This document describes Pre-Application Meetings and Submittal procedures.

The Town has a range of types of Planning applications that vary in complexity. These procedures provide an outline for more complex projects. Smaller projects may go through a slightly different procedure. Staff will guide you throught the steps. Please note that procedures are subject to change and refinement.

Step 1 - Schedule Pre-Application Meeting with Planning Staff

- Pre-Application meetings are required for larger projects such as new houses, significant additions, and signicifant changes to driveways, landscaping, or topography. Smaller scope projects, including new Accessory Dwelling Units, may require a Pre-Application Meeting or shorter duration Virtual Counter Meeting. Staff will let you know what type of meeting is required for your project.
- Meetings will be held by appointment for one-hour durations
- When you have a substantial plan set for review (see below for plan set requirements) utilize PV Connect to request an appointment. To access/sign up for PV Connect, either download the app or visit our website at www.portolavalley.net/virtualappointment. Once you have created a log in, go to "Planning Permit Submittal" and complete all the required information concerning the project. Once you have submitted your information to request a virtual appointment, your request will be placed in the queue and we will contact you to schedule the meeting.
- Pre-application meetings for new construction and significant remodels require payment of a fee and deposit in advance of the meeting. The deposit is designed for continued guidance/direction as the applicant prepares the formal application submittal.
- Pre-application meetings for minor remodels, accessory dwelling units/accessory structures, and other limited scope of work projects do not require payment of fee/deposit.
- Staff will provide fee and deposit amount with directions on how to mail in payment.
- Once payment is received, staff will schedule a meeting based on availability (expect to provide a two-week availability window for scheduling); staff will send an email with meeting date and time confirmation.

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- Staff will provide an email with the upload link and meeting date and time confirmation (Please expect to provide the plans and materials on the same day you receive the meeting confirmation)
- Plan materials for a productive Pre-Application Meeting include:
    - Site plan
    - Floor plan
    - Elevations
    - Landscape plan
    - Grading and Drainage plan with cut and fill table
    - Topographic survey and title report
    - Picture of fee payment check
    - Staff can also review any additional documents the applicant wishes to provide within the hour long appointment
- Staff will provide initial feedback and additional items to submit for the formal submitall during the meeting, such as:
    - Application form and submittal checklist for additional items not discussed during meeting
    - Guidance documents such as design guidelines, Code references, etc.
    - Pre-application checklist that summarizes meeting and Staff initial findings
- Staff cannot provide detailed project specific guidance before this meeting; preliminary guidance can be provided through a Virtual Counter Appointment.
- Projects that do not initially require a fee/deposit submittal and projects that require additional guidance may be subject to additional deposits requested at the formal application stage of the project to cover staff time.
- Due to the high volume of inquiries, staff is implementing the following guidelines:
    - Applicants who do not provide plans and materials within 24 hours of the confirmation email will need to reschedule their meeting.
    - Staff uses Box for uploading files (Other sharing platforms will not be utilized.) The provided upload link does not require a Box account for use.

Step 2 – Schedule an Intake Review meeting with Planning Staff

- Most new planning application submittals require an Intake Review appointment. Staff will let you know if this meeting is required.
- Intake review meeting is designed to review the application packet and determine if the packet is ready for formal submittal
- Meetings will be held by appointment only; there is no fee for this meeting
- Utilize PV Connect to request an appointment. To access/sign up for PV Connect, either download the app or visit our website at www.portolavalley.net/virtualappointment. Once you have created a log in, go to "Planning Permit Submittal" and complete all the required information concerning the project. Once you have submitted your information to request a virtual appointment, your request will be placed in the queue and we will contact you to schedule the meeting.
- Staff will provide an upload link to transmit the application packet for intake review

- Submittal of the application packet for this review does not constitute a completeness review per Permit Streamlining Act; this review is similar to what staff provides at the counter in person when submittal of an application occurs – but no formal submittal will occur at this step (see Step 3)
  - This review may take up to a week for review and fee calculation
- Based on the submitted packet, staff will make the following determinations:
  - Packet is cleared for submittal, proceed to Step Three for further information
  - Packet is incomplete and needs additional items for submittal
    - Staff will note outstanding items on application checklist
    - Applicant will need to schedule another intake review meeting once outstanding items are gathered
- Due to the high volume of projects, staff is implementing the following guidelines:
  - Applicants who do not provide plans and materials within 24 hours of the confirmation email will need to reschedule their meeting.
  - Staff uses Box for uploading files. (Other sharing platforms will not be utilized.) The provided upload link does not require a Box account for use.

Step 3 – Schedle a Application Submittal Appointment with Planning Staff
- All new planning application submittals require an Applicantion Submittal Appointment
- The application submittal appointment is designed to allow for submittal of the Planning application so staff can begin reviewing/processing/routing the application packet
- There is no fee for this meeting
- When you have all of the required submittal items, and Staff has cleared you for submittal, utilize PV Connect to request an appointment. To access/sign up for PV Connect, either download the app or visit our website at www.portolavalley.net/virtualappointment. Once you have created a log in, go to "Planning Permit Submittal" and complete all the required information concerning the project. Once you have submitted your information to request a virtual appointment, your request will be placed in the queue and we will contact you to schedule the meeting.
- Staff will provide an upload link to transmit the application packet, provide fee calculation, and instructions on how to submit fees for processing.
- Once fees are processed, the application is considered officially submitted and ready for formal review.
- Submittal Intake appointments with Planning staff are subject to the following guidelines:
  - Applicants who do not provide request items within a 24-hour period will need to reschedule their submittal intake appointment
  - Staff uses Box for uploading files (Other sharing platforms will not be utilized.) The provided upload link does not require a Box account for use.

If you have questions about this process, please contact Dylan Parker at dparker@portolavalley.net. If you have general questions for the Planning and Building Department and you're not sure who to contact, email us at planbuild@portolavalley.net.