



MAJOR/MINOR ARCHITECTURAL (AR) AND STREAMLINED HOUSING DEVELOPMENT REVIEW SUBMITTAL CHECKLIST

Planning intake appointments are required to submit all Planning entitlements. Appointments can be made by calling the Planning Division at (650) 329-2496 ext. 6, option 2 or by emailing planningintake@palocalto.gov.

Prior to making an intake appointment, upload all required documents as a Pre-application (Pre-app) through the City's [Online Permitting Services](#) portal. Directions on creating an account and submitting a Pre-app are available at [OPS Guidelines](#). Please note, the account used for the Pre-app will be the main contact and uploader for the entirety of the Planning project. Applications must contain a minimum of information to be accepted (18.77.020).

If not already completed for the proposed project, you are **strongly encouraged** to discuss the proposed plans with adjacent neighbors prior to application submittal.

1. PLANNING APPLICATION FORM

- a. [Application form](#) is available at [Forms and Applications](#), ensure completion of items 1-5
- b. Application cannot be accepted without a property owner's signature
- c. For projects on Stanford land, a signed approval form with plans stamped and approved by Stanford Management Company shall be included with the application form
- d. Title the PDF document "C1[insert address]APPLY.pdf", per the [OPS Submittal Guidelines](#).

2. ELECTRONIC PLAN SET

- a. Follow formatting and bookmarking requirements outlined in [OPS Submittal Guidelines](#)
- b. Add bar scale and north arrow shown on all sheets
- c. Orient all sheets in the same direction
- d. Draw to fill the page at 1/4 inch or 1/8 inch scale
- e. Plans shall be in PDF format for posting on the City's website, shall be in one file, and optimized for printing to 11 inch by 17 inch paper
- f. Plans should be bookmarked and flattened/compressed if the PDF file is over 30MB
- g. Title the PDF plan set "C1[insert address]PLAN.pdf", per the [OPS Submittal Guidelines](#)
- h. **For a detailed explanation of the required items in a plan set, see A-Q on the pages below.**

3. WRITTEN PROJECT DESCRIPTION

- a. The project proposal will be reviewed by City department representatives and others who have not had the benefit of meeting with the applicant. Therefore, the description should be thorough. The project proposal shall include: 1) the scope of work to be done; 2) the existing and proposed uses; 3) the purpose of the proposed changes; 4) the design intent; 5) materials, colors, and construction methods to be used; 6) landscaping and 7) lighting
- b. Include the project description in a single pdf, titled "C1[insert address]DOCS.pdf".

4. TRANSPORTATION ANALYSIS

- a. Projects expected to generate 100 or more net new weekday (AM or PM peak hour) or weekend peak hour trips, including both inbound and outbound trips must follow the methodologies presented in the [VTA Transportation Analysis Guidelines](#) for intersections within the CMP system. The applicant must evaluate the transportation effects of the project and submit a full TA report.
- b. Projects expected to generate 50 or more net new weekday (AM or PM peak hour) trips, including both inbound and outbound trips are required to prepare and submit a [Local Transportation Analysis \(LTA\)](#). Depending on the size and layout of the project, additional studies, such as a queuing analysis, transit analysis, bicycle and pedestrian circulation studies, parking analysis, Traffic Infusion on Residential Environments (TIRE) analysis may be required to be included in the LTA report. In alignment with the LTA policy, the City may also require an LTA or LTA elements if, in its reasonable

judgement, a project will potentially cause a deficiency in the operation of local intersections, roadways, or bicycle/pedestrian facilities.

- c. Projects expected to generate less than 50 net new peak hour trips are required to prepare and submit a "Traffic Memo" to document the estimated number of peak hour project trips, and to identify necessary safety and access improvements at project driveway points. A traffic memo typically includes: A Trip Generation analysis that verifies the project would generate less than 50 AM or PM peak hour trips on a typical day; an analysis of the access driveways, circulation into and out of, and around the project site to ensure any safety concerns are addressed; and an analysis of the intersection with and without the project may be requested under the existing conditions if the project is located at a sensitive intersection.

5. TRANSPORTATION DEMAND MANAGEMENT (TDM) PLAN

- a. Projects expected to generate fifty (50) or more net new a.m. or p.m. peak hour vehicle trips, or any project requesting a parking reduction, must prepare a TDM Plan prepared by a qualified transportation professional. The TDM Plan must include: a project description; estimated a.m. and p.m. peak hour vehicle trips generated by the project; the percent and total number of required trip-reduction targets consistent with the Comprehensive Plan Policy T-1.2; a description of the TDM strategies proposed to meet those targets; methods for annual monitoring and reporting requirements; and a statement of acknowledgment of annual monitoring and reporting requirements to the City for the life of the project. Projects within a ½ mile radius of a major transit stop are not required to provide vehicle parking pursuant to AB 2097. These projects shall prepare and submit a TDM Plan, unless otherwise exempt under the Municipal Code. Applicable bicycle parking requirements shall apply. If vehicle parking is voluntarily provided, all ADA parking requirements shall be met.

6. ENVIRONMENTAL INFORMATION ASSESSMENT WORKSHEET

- a. Submit completed [EIA Worksheet](#) as single pdf (less than 30 MB), titled "C1[insert address]ENVIR.pdf"
- b. At applicant's expense, City may hire environmental consultant to complete required [CEQA](#) review
- c. If hazardous materials are present or will be used/stored on site, submit a complete [Hazardous Materials Disclosure Checklist](#), also see Fire Department for hazardous material permit.

7. COLOR AND MATERIALS SAMPLE BOARD

- a. Submit samples of actual colors and materials mounted on foam board no larger than 8" x 14" to be retained by the City as part of the project file. Multiple boards may be submitted if needed.

8. APPLICATION FEES

- a. When the project is accepted by a Planning Technician for a formal application, you will be notified to pay fees online through the OPS portal. See fee schedule at [Fee Schedule](#). Staff review does not start until fees are processed.

9. ON-SITE POSTING (MAJOR AND MINOR BOARD-LEVEL AR AND HOUSING PROJECTS)

- a. At the time of accepting the formal application, you will receive a PDF project sign from the City. Print this sign at a minimum of 18 x 24 inches, on waterproof sign board material, with stakes. Affix the project information "sticker" provided by the City and a proposed streetscape image (minimum size of 4 inches by 17 inches) to the sign and post on project site. Email a photograph of the sign posted on the property to the Project Planner within three (3) days of project submittal. The sign must be prominently displayed so it may be viewed from the sidewalk and/or public right-of-way. The sign shall remain in place until the Planning decision is effective.

10. RESUBMITTALS

- a. After initial submittal comments have been addressed, applicant will upload resubmittals and/or additional materials through the OPS portal, using the red "resubmit" button at [PaloAltoACA](#).

REQUIRED INFORMATION FOR SCHEMATIC PLAN SET

City staff has discretion to modify these requirements to omit items or to include additional items (e.g. shadow studies, story poles, soils report, etc.) based on the scope of the project. Applicants are encouraged to provide additional information where helpful. It is highly recommended that applicants meet with a planner at the Development Center to determine which items will be required based on the scope of work. Applicants may also contact planning staff by emailing planner@PaloAlto.gov.

Electronic Plan Sets:

- Color plan sets may need to be printed by the applicant prior to a public hearing
- All text shall be legible when printed on 11 x 17 inch reduced-size sets
- Scale and scale bars shall be indicated on each sheet
- North arrow shall be on each sheet and orient all sheets in the plan set in the same direction
- Information must be consistent on all plan sheets and shall be provided in the order indicated below

A. Title Sheet:

- Vicinity Map showing the location of the site within the City
- Rendering of the proposed project
- Project Data Table:
 1. Lot Area
 2. Site Coverage (Existing & Proposed)
 3. Floor Area (Existing & Proposed) ([PAMC 18.04](#))
 4. Setbacks
 5. Height ([PAMC 18.04](#))
 6. Required Parking ([PAMC 18.52](#)), including loading spaces and bike parking
 7. Building Occupancy Class

For Residential Projects, include the following in the Project Data Table:

8. Number of existing units, demolished units, and new units
9. Proposed residential density
10. Unit types and count (e.g. 2 Studios, 3 One-bedroom, etc.)
11. Number of Below Market Rate (BMR) units required/proposed
12. Landscape Open Space area (total area calculated and percentage of site area indicated)
13. Usable Open Space area (sq. ft./unit) required/proposed
14. Common usable open space area (sq. ft./unit) required/proposed
15. Private usable open space area (sq. ft./unit) required/proposed

B. Neighborhood Context Sheet:

- Dated aerial photograph of the site and adjacent properties with adjacent land uses noted.
- Photo images showing the relationship of the proposed project to adjacent buildings

C. Site Plan Sheets: *Show both existing conditions and proposed changes*

- Dimensioned property lines
- Any underlining lot lines, easements or encumbrances across the property
- Footprint of all buildings and structures on the site
- Adjacent streets and building footprints
- Demolition plan indicating what is to be removed on the site
- Zoning setback lines (including Stanford setback lines if applicable)
- Dimensioned parking area, driveways, and sidewalks
- Site contours
- Light fixtures, bicycle parking, trash and recycling (including proposed containers or related equipment), enclosures, fences, sanitary sewer drains, and grease traps

- Improvements in the public right-of-way, including streets, curbs, sidewalks and street trees within 30 feet of the property
- Location of all existing utilities within the site and along the adjacent public right-of-way, including underground utilities (sewer, gas, electric, water, telecommunications, etc.)
- Location of backflow preventers, above-ground electrical utilities, boxes, transformers, meter mains, fire standpipes, storm drains, etc.
- Creeks or waterways on or adjacent to the property and indicate 'top of bank'
- Tree location, species, size, dripline area, including trees located on neighboring property that overhang the project site (see instructions on the [Tree Protection Sheet](#) (T-1)), consistent with the City [Tree Technical Manual](#), Section 1.28
- Existing signs and location of proposed or potential signs including directional and tenant signage

D. Streetscape Sheet:

- Streetscape elevations shall show the proposed project and adjacent properties on each side of the property (drawn to scale). To the highest degree possible, the drawing should accurately show building heights and profiles with dimensions. Trees should be in outline form, so as to not obscure structures.

E. Building Elevation Sheets:

- Fully dimensioned elevations of all sides of the building(s)
- All roof-top equipment and associated required screening; line of sight diagrams shall be included as necessary to demonstrate appropriate screening
- Outlines of adjacent buildings
- Maximum height limit and daylight plane requirements
- All window, door, eaves, skylights, chimneys, rain water leaders, roof equipment and screens, and other appurtenances
- Type, finish, material, and color of all surfaces shall be indicated and should cross reference the color and materials board
- All signage (or proposed location) and associated lighting
- Differentiate between existing conditions to remain and proposed changes, as necessary

F. Floor Plan Sheets:

Submit sufficient floor plans to indicate how the interior of the building affects the exterior design, particularly window and door placement, required emergency exits, space usage, stairs, elevators, etc.

- Fully detailed dimensioned floor plans, including roof-top
- Location of sanitary sewer drains, grease traps, and other utilities
- Fully dimensioned parking garage plans including location of electric vehicle chargers and related equipment (see section L). All spaces should be numbered.

G. FAR Diagram Sheet:

- Provide block area diagrams, using the same floor plans referenced above, showing how gross floor area was calculated
- Indicate all dimensions used to calculate areas

For Projects with more than one land use:

- Provide color coded floor area diagrams utilizing different colors for each use and a separate color for common circulation/mechanical rooms/trash enclosures. Non-residential floor area that is comprised of more than one land use shall also be differentiated on the sheet. For example, if a project has office, retail, and personal service uses, each use and the associated floor area must be indicated and shown.

H. Section Sheet:

- Provide illustrative wall section from parapet to foundation showing foundation, wall, windows, and doors, parapet, cornice, eave, roof (drawing should be at a minimum $\frac{1}{2}'' = 1'$ scale)

- Provide building site sections showing roof and floor heights, site slope, automobile or pedestrian ramps, basements, underground garages, penthouses, etc.
- Provide section(s) at adjacent property lines indicating any grade differentials, showing fence height, retaining walls, ground slope, etc. (drawing should be 1" = 10' scale).

I. Roof Plan Sheet:

- Dimension any useable space, such as terraces or gardens
- All roof-mounted equipment, such as Heating Ventilation Air Conditioning (HVAC) Units, vents, etc.
- Equipment screens
- Photo-voltaic panels, if proposed
- Label roof materials and finish.

J. Landscape Plan Sheet:

- Schematic Landscape Plan
 1. Trees and vegetation to be removed, retained, and planted
 2. Location, species, quantities, and size of all proposed plant materials (plant list)
- Open space: include dimensioned site, usable, common, and private open space areas as required for the project
- Fences, trellises, pots, street furniture, and other amenities
- Trash enclosures, bicycle enclosures, etc. ([Trash Enclosure Guidelines](#)) and associated screening
- Location of backflow preventer, above-ground electrical utilities, boxes, transformers, meter mains, fire standpipes, etc.
- Drainage plan to conform with the Storm Water Pollution Prevention Plan (SWPPP) and C-3 Requirements where required (contact Public Works Engineering 650-329-2151 for requirements)
- Ensure conformance with [MWELO](#) requirements, see [checklist](#)

Note: The final planting and irrigation plan must be approved by Planning and Utilities Marketing prior to building permit approval.

K. Arborist Assessment and Report Sheets

- Shall be consistent with the City [Tree Technical Manual](#), Section 2.10
- Required [Tree Protection Sheet](#) (T-1)

L. Lighting Plan Sheet:

- Photometric drawing with foot-candle measurements
- Catalog cut sheet of proposed exterior fixtures

M. Parking Layout and Automobile Circulation Sheets:

- Fully dimensioned parking plan and required number of vehicular, loading, and bicycle parking spaces; number all spaces.
- EV chargers¹:
 1. Location and total number of EV chargers and EV ready stalls
 2. Fully dimensioned chargers, bollards², related equipment, and adjacent walking paths/parking spaces (Min. parking dimensions must be maintained, see [PAMC 18.54](#))
 3. Location of required trenching
 4. Location of emergency power shut off.
- Accessible parking, loading signage
- Main points of entry and exit and traffic flow
- Bicycle racks and/or lockers and cut sheets

Note: If a [parking reduction](#) is requested, a Transportation Demand Management (TDM) study is required to be submitted at the time of application submittal.

N. Pedestrian/Bicycle Circulation Sheet:

- A pedestrian and bicycle circulation plan is required for new development applications or any application which involves proposed changes to the existing circulation layout and configuration.

O. Schematic Details Sheet:

Appropriate architectural details to indicate the quality and nature of the design, including:

- Details showing how adjacent, dissimilar materials connect. Examples include: siding to windows, siding to roofs and parapets, eaves, railings, corners, connections to existing structures
- Details showing attachments to buildings, when these occur (such as railings and awnings)

P. Green Building Program Sheet: Palo Alto is committed to green building and energy efficiency for new construction, addition, and renovation projects.

- At this phase, include a signed preliminary CALGreen Checklist into the plan set. The appropriate preliminary CALGreen Checklist (GB-1) can be found on the to the [Green Building Compliance webpage](#).

Q. 3-Dimensional Images Sheet:

- Massing model, axonometric or perspective drawings from the most visible locations. 3-D images are encouraged and may be physical models, hand drawings, or computer generated.

OTHER SUBMITTAL REQUIREMENTS

1. Soils Report and Water Management

- If a project is C.3 stormwater regulated (thresholds for regulation provided below), applicant will be required to submit qualified third part reviewer certification of proposed C.3 design, prior to public hearing and Planning approval. Consult with Public Works staff for assistance with this requirement.
 1. Projects that create or replace 10,000 sq ft (5,000 sq ft if categorized as a 'special land use' by MRP 2.0) of impervious area are C.3 regulated.
- Below grade structures will be required to submit a soils report. The soils report needs to include current ground water depth information.

For projects that add or remove housing units, include the following project information:

2. Residential Project Details

- Complete the "Housing Projects – Information Checklist for Development" form

3. Affordable Housing Plan

- All development projects that include affordable residential units, as defined in [PAMC 16.65](#), shall submit an Affordable Housing Plan for review and approval. See the "Affordable Housing Plan Specifications" handout for details.

¹ Reference CalGreen Ordinance for total required EVSE and or consult the Building Department located at the Development Center

² Palo Alto Fire requires bollards to be installed to prevent collision impacts from vehicles; these bollards **cannot** reduce the minimum required parking dimension or result in a loss of parking stalls.

Useful Weblinks & Information

- [Accela Citizen Access Portal](#)
- [Municipal Code](#)
- [Current Planning \(Process Information & Forms\)](#)
- [Planning Application Fees](#)
- [Development Services Center](#)
- [Parcel Report](#)
- [Green Building Compliance Page](#)
- [Public Works Flood Zone Information](#)
- [Palo Alto Urban Forestry Page](#)
- [Storm Water Pollution Prevention \(Public Works\)](#)
- [Tree Technical Manual](#)
- [Tree Protection Sheet \(T-1\)](#)
- [Model Water Efficient Landscape Ordinance \(MWELo\)](#)