



SINGLE FAMILY INDIVIDUAL REVIEW (IR) SUBMITTAL REQUIREMENTS CHECKLIST

Starting 2021, virtual appointments are required to submit all applications. Appointments can be made by calling the Planning Division at (650) 329-2441 x0. To ensure timely processing, incomplete applications will not be accepted.

Prior to your appointment, upload all required documents as a Pre-Application through the City's [Online Permitting Services](#) portal. Directions on creating an account and submitting a pre-app are available at bit.ly/paloaltoOPS. Please note, the account used for the pre-app will be the main contact and uploader for the entirety of the project.

1. PLANNING APPLICATION FORMS

- a. [Application form](#) is available at bit.ly/Paplanningforms, ensure completion of items 1-5.
- b. Application cannot be accepted without a property owner's signature
- c. Fill out [Individual Review Statement Of Understanding](#), signed by applicant or property owner.
- d. Include all application documents as a single PDF.
- e. Title the PDF document "C1[insert address]APPLY.pdf", per the OPS Submittal Guidelines.

2. ELECTRONIC PLAN SET

- a. Follow the requirements for DigEPlan bookmarking per the [OPS Submittal Guidelines](#).
- b. Bar scale and north arrow shown on all sheets
- c. Orient all sheets in the same direction
- d. Drawn to fill the page at 1/4 inch or 1/8 inch scale
- e. Plans shall be 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. If the PDF file is over 30MB, the plans must be divided into two files or reduced. Revised and final electronic plan sets shall be provided as needed.
- f. Title the PDF plan set "C1[insert address]PLAN.pdf", per the OPS Submittal Guidelines
- g. **For a detailed explanation of the required items in a plan set, see A-L on the pages below**

3. APPLICATION FEES

- a. When the project is accepted by a Planning Technician for formal application, you will be notified to pay fees online through the OPS portal. See fee schedule at bit.ly/Paplanningforms. Staff review does not start until fees are processed.

4. ON-SITE POSTING

- 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.

5. 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 bit.ly/PaloAltoACA.

REQUIRED INFORMATION FOR SCHEMATIC PLAN SET*:

*These requirements may be modified by City staff to omit items or to include additional items (e.g. soils report, etc.) based on the scope of the project. Applicants are encouraged to provide additional information where helpful.

To improve processing times, Staff recommends the order of the sheets in the plan set be as directed below.

A. TITLE SHEET WITH PROJECT DATA

- Project Address, Assessor's Parcel Number (APN), Zoning District, Vicinity Map
- Rendering or Front elevation of the proposed project
- Data Table with the following information:
 - Net Lot Area (excluding any area located within a street easement, watercourse easement, or within top of creek bank). If net lot area is different from City's parcel report, a certified surveyor's report shall be included in plan set.
 - Allowable FAR (45% of first 5,000 sf + 30% > 5,000 sf) and Proposed FAR
 - Allowable Lot Coverage (35% of lot area) and Proposed Lot Coverage
 - 5% Additional Lot Coverage permitted for covered patios, porches, trellis, or roof overhangs beyond 4 feet.
 - Required and provided parking spaces
 - Note if project site in a Special Flood Hazard Area and note base flood elevation (BFE).
 - If Yes, project must be discussed with Public Works Dept. prior to application submittal.
 - Note if the project must conform to the Contextual front yard setback and/or garage placement
 - Note if the site has a historic designation
 - Note percent of permeability in front setback (60% permeable required).

B. NEIGHBORHOOD CONTEXT

- Streetscape Elevation – A line drawing of the proposed project's street-facing elevation(s) along with the street-facing elevation of one home on each side of the proposed home, **drawn to scale (1/8" minimum)**. To the highest degree possible, the drawing should accurately show building heights and profiles with dimensions. Trees, if shown, should be in outline form so as not to obscure structures. See pages 6-7 of [IR Guidelines](#).
- Neighborhood privacy diagram - Show proposed 2nd floor plan including windows, major on-site vegetation, and all elements on the neighboring property within 25 feet of the subject property line. For adjacent sites show major vegetation, building footprints, windows (indicate size and location), and patios within 25 feet of the property lines. Provide info on site plan or as a separate diagram. See pages 14-15 of [IR Guidelines](#).
- Contextual front yard setback diagram – Provide this diagram for new homes and additions that occur on the front of the house. See page 21 of the [Zoning Technical Manual](#).
- Contextual garage placement diagram – Provide this diagram if a new garage is proposed in the front half of the lot. See page 37 of the [Zoning Technical Manual](#).

C. PHOTOS

- Color photos of the existing house, from the street, in context with neighboring structures.
- Color photos of the rear and side yards of the subject site to document existing vegetation on and directly adjacent to the site.
- If a second floor deck or low sill (below 5 feet) second floor windows are proposed, include panoramic photos taken at the same height and location as the proposed deck/windows.

D. TOPOGRAPHIC SURVEY

- Topographic survey prepared by a qualified surveyor illustrating the legal boundaries, dimensions of all property lines, easements, right-of-way, trails, public utilities and utility poles, location of all existing improvements/structures, setback of existing improvements/ structures, tree trunks, tree species and accurate depiction of tree canopies/drip line, along with spot elevations across the site.
- For minor additions, you may consult a Project Planner to determine if survey work may be limited to a boundary survey. This will depend on how close the structure is to the daylight plane.

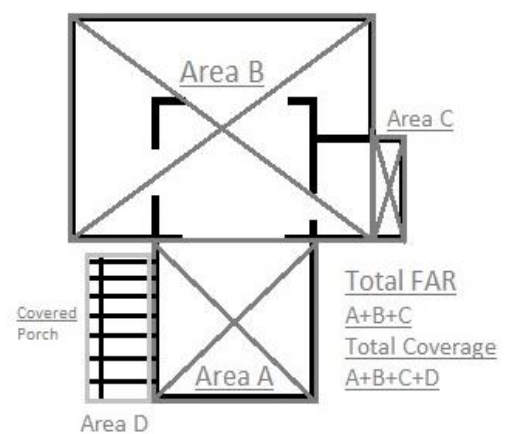
E. SITE PLAN

- Dimensioned property lines consistent with surveyor's report
- Show footprints and overhangs of all existing and proposed buildings and accessory structures
- Dimension all required and proposed setbacks including any special setbacks and contextual front setback (if contextual setback is greater than standard setbacks)
- Note all existing and proposed fences/walls with their heights indicated.
- Surface parking area, driveways, paths, and sidewalks (note paving materials, driveway width, and dimension parking spaces)
- Location of utility hookups, meters, boxes, and mains on and directly adjacent to the site, including any required back-flow preventors.
- Show all easements and label with type of easement
- Improvements in the public right-of-way including streets, curbs, sidewalks, and street trees
- Label distance between street curb and property line.
- Show all outdoor mechanical equipment (pool filters, air conditioners, etc.)
- Topographic elevation of the first floor level and spot elevations of existing and finished grade around property to determine daylight plane compliance and adjacent to building footprint for height measurement. See pages 26-28 of the [Zoning Technical Manual](#).
- Show the numbered location, species, size, and dripline of **all** trees on site over 4" in diameter, including neighboring trees that overhang onto the project site, with note of the tree's disposition (retained, removed, or proposed). Show tree locations on other sheets as necessary.
- Label TPZ radius. The TPZ radius is ten (10) times the diameter of the tree, when measured 54 inches above natural grade as further detailed by [The Tree Technical Manual](#), Sections 2.00 & 6.35.
- Show all tree protection fencing in its proposed location, dimensions from tree, and label tree protection fencing type (Type I, II, III).
- Creeks or waterway easements on or adjacent to the property. Indicate top of bank.

F. FLOOR PLANS

- Sufficient floor plans to indicate how the interior of the building affects the exterior design, particularly window and door placement, space usage, stairs, etc.
- Dimensioned floor plans for all buildings, new and proposed to remain
- Diagram showing total floor area and coverage via blocked-out areas and calculations for each block to determine FAR and Lot coverage compliance (overlay this information on a separate floor plan). Use as few blocks as possible, see example.

EXAMPLE BLOCKED AREA DIAGRAM



G. ROOF PLANS

- Show roof pitches and dimension overhang depths
- Provide a detail for all eaves that are proposed beyond a required setback or daylight plane.

H. **BUILDING ELEVATIONS**

- Provide elevations of all sides of the building(s), including accessory structures and fences/walls.
- Label height limits and daylight planes for the home and detached accessory structures.
- Measure the distance under the daylight plane perpendicular to the daylight plane
- Note the daylight plane grade reference point. The note shall state: "Grade for the purpose of establishing daylight plane shall be an average of the grade at the midpoint of the building and grade at the closet point on the adjacent lot." See page 27 of the [Zoning Technical Manual](#)
- Note grade elevation from where the maximum height is measured and finished floor elevation. (See definition of "Grade" in Zoning Code Section 18.04)
- Show all windows, doors, eaves, chimneys, trim, porch columns, and other features
- Show window operation, label second floor sill height, and note any obscured glazing
 - Obscure windows should generally open towards the street to maintain privacy when open
- Note material and finish for roofing, siding, windows, entry and garage doors, trim, railing, etc.
- Dimension height of any privacy screen walls and fences.
- Existing conditions to remain and proposed changes

I. **SECTIONS**

- Provide two sections minimum
- Indicate roof pitch, floor to floor heights, topographic height of first floor, floor to grade heights, plate heights at upper levels, attic, stairs, cathedral ceilings, outlines of building eaves, etc.
- Show daylight plane protrusions and/or 2nd and 3rd story equivalency area. See pages 16-17 & 26-28 of the [Zoning Technical Manual](#).
- Provide detail of typical eaves/rakes
- Provide enlarged building wall section, 1/2 inch scale or larger, showing structural dimensions of floor and roof framing, roofing materials and daylight plane if the roofline on the section or elevations is within one (1) foot of the daylight plane.

J. **GREEN BUILDING (GB) SHEET**

- Refer to the [Green Building Compliance webpage](#) to verify the applicable level of green building requirements and download the appropriate CALGreen Checklist (GB-1).
- Include a preliminary CALGreen Checklist (GB-1) in the plan set.
 - Signatures on this sheet will not be required until the building permit submittal.

K. **TREE PROTECTION SHEET(S)**

- Trees and tree protection fencing shall be shown on the site plan and will be reviewed by the City's [Urban Forestry Section](#).
- The plan set shall include a [T-1 sheet](#) filled out and **signed** by the property owner or applicant.
- Tree Protection Report (TPR) prepared by an ISA certified Arborist will be required for any development within the tree protection zone (TPZ) of a protected and/or designated tree, and may be required for others, including street trees as deemed necessary by the City Arborist. See [Overview of Regulated Trees](#). When required, include completed Tree Protection Report as Sheet T-2, T-3, etc.

ADDITIONAL INFORMATION THAT MAY BE REQUIRED*:

*Please check if one or more of these categories apply to your project.

L. PROPERTIES IN A SPECIAL FLOOD HAZARD AREA

- Schedule a discussion with Public Works Engineering prior to application submittal.
- Provide the Base Flood Elevation (BFE), elevation of the lowest floor of the proposed structure [Source: North American Vertical Datum of 1988 (NAVD88)], and FIRM panel number.
- The [Screening Checklist](#) for Building in Special Flood Hazard Area must be completed and submitted
- If the property owner is working with FEMA to remove all or a portion of the property from a Special Flood Hazard Area (SFHA), submit any pending FEMA applications or approved Letters of Map Amendment (LOMA) or Conditional Letter of Map Revision based on Fill (CLOMR-F). For additional information visit the Public Works [Floodplain Management](#) webpage

M. PROJECTS ADJACENT TO A CREEK

- Slope stability analysis to ensure conformance with PAMC 18.40.140
- Show creek setback on soils report site plan

N. RENOVATION/ADDITIONS TO EXISTING HOMES

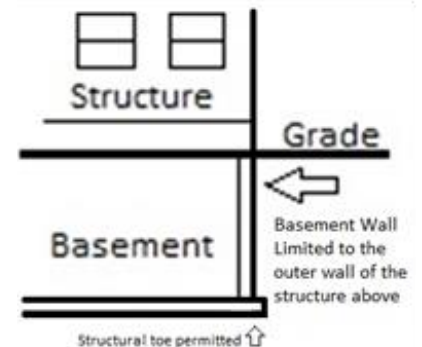
- Provide a demo plan that accurately shows which walls will be removed/retained.
- Note non-complying walls on the site plan and floor plans.
 - If the wall is to be modified, a valuation calculation in conformance with PAMC 18.70.100 will be required and should include a comparison of the costs to keep the nonconformity as proposed vs. the cost of bringing the nonconformity into compliance.

Example valuation calculation:

	Cost to Build as Proposed	Cost to Bring into Conformance
Foundation	\$	\$
Walls	\$	\$
Roof	\$	\$
Total	\$	\$

O. BASEMENTS

- For basements proposed within the TPZ of a protected tree, provide a shoring plan that indicates the type and location of shoring for the basement.
- Sections must show basement walls that do not project beyond the walls of the structure above, structural toes are allowed, see example.
- A soil report to determine ground water levels may be required at the Planning stage and will be required with Building permits.
- [Groundwater pumping](#) will be regulated by Public Work Engineering.



P. LANDSCAPE PLAN

- If trees are proposed to be removed provide a detailed landscape plan showing replacement trees as required by the City’s “no net loss of canopy” policy.
- If screening trees are needed for privacy (Guideline 5), provide the proposed species and note the tree shall be a minimum of 24 inch box size and 8 foot height.
- This information could also be combined with the Site Plan.

Q. PROJECTS IN NEW OR RECENT SUBDIVISIONS

- Applications involved with a new or recent subdivision: Public Works will require C3 documents to be submitted and completed before Planning approval of any IR application.

R. OTHER - The following items will be required at the Building permit stage and can be provided early to start the review process

- Show required solar panels and any associated structure(s).
- Provide a [grading and drainage plan](#). This may be required at the Planning stage, especially for homes with a basement on sloped property.
- Documentation to ensure compliance with [Model Water Efficient Landscape Ordinance](#) (MWELo).
 - [Compliance Submittal Checklist and Guidelines](#) is required for the following:
 - new construction project with an aggregate landscape area of 500 square feet or more.
 - rehabilitated construction project with an aggregate landscape area of 2,500 sf or more.
 - Any project with an aggregate landscape area 2,500 square feet or less may comply with the performance requirements of this ordinance or conform to the prescriptive measures contained in Appendix D of the [MWELo](#).
- Provide information regarding electrical load, particularly if load is expected to exceed 400 amps as this will likely require upgrades to existing transformers. Common high-load items include multiple EV chargers, elevator, etc.
- Provide an electronic plan set with geo-coded structures and trees

Note: Plans submitted for Individual Review will be reviewed by [Planning](#) (650-617-3117) for compliance with the Zoning Ordinance (Title 18 of the Municipal Code) and the City's Individual Review Guidelines.

Applicants are advised to review proposed plans with [Building](#) (650-329-2496) and [Public Works Engineering](#) (650-329-2557), prior to submitting an Individual Review application, to avoid delays and costly redesign.

Useful Weblinks & Information

Palo Alto Municipal Code

- bit.ly/PAZoningCode

Planning Application and Fee Schedule (updated annually)

- bit.ly/PAplanningforms

Request a Parcel Report

- bit.ly/PAParcelReports

IR Guidelines

- bit.ly/paloaltoIRguidelines

Zoning Ordinance Technical Manual for Single-Family Residential Zones

- bit.ly/PAtechnicalmanual

Palo Alto Online Permit Services

- bit.ly/paloaltoOPS

Palo Alto OPS Submittal Guidelines

- bit.ly/paloaltoOPSGuidelines

OPS Pre-Application Instructions

- bit.ly/paloaltoOPSpread

Accela Citizen Access Portal

- bit.ly/PaloAltoACA

Palo Alto Eichler Neighborhood Design Guidelines

- bit.ly/PAEichlerGuidelines

Professorville Historic District Design Guidelines

- bit.ly/ProfessorvilleHistoricGuidelines

Historic Preservation Incentives

- bit.ly/HistoricPreservationIncentives

Palo Alto Urban Forestry Page

- bit.ly/PAUrbanForestry

Tree Technical Manual

- bit.ly/PATreeTechManual

Tree Protection Sheet (T-1)

- bit.ly/PATreeProtectionSheetT1

Water Efficiency Compliance

- bit.ly/PAWaterEfficiencyCompliance

Model Water Efficient Landscape Ordinance (MWELo)

- bit.ly/ModelWaterEfficientLandscapeOrd

MWELo Submittal Requirements

- bit.ly/MWELoSubmittalReq

Public Works Forms and Permits Page

- bit.ly/PWFormsPermits

Storm Water Pollution Prevention (Public Works)

- bit.ly/PAStormWaterPollution

Dewatering Regulations

- bit.ly/PWDewateringReg

Public Works Flood Zone Information

- bit.ly/PAFloodZones

Public Works Flood Zone Screening Checklist

- bit.ly/PWFloodZoneScreeningChecklist

LOMA/LOMR Information

- bit.ly/PAFloodZoneLOMAinfo

Green Building Compliance Page

- bit.ly/PAGreenBuilding