CONCEPT PLAN MEETING

1. Planner (Non-BS&A)	- Save all the documents (such as concept plans, location maps, business cards) that were provided by the applicant at the concept meeting in PDF format in the **G:/Plan Review Center/ Plan Review Projects/ Concept Meetings** in a folder named by a key word. - Fill in the Concept Meeting Inventory spreadsheet with the appropriate details. **Save Summary Notes in the folder.**

PRE-APPLICATION MEETING

1. Clerical Staff	Navigate to the appropriate property, initiate the correct project (i.e., Com/Ind/Office, etc.), rename the project, and add a description under the main project screen. Use the name listed in the application.
2. Clerical Staff	- Initiate the Pre-application permit. **Change the inspector box to the reviewing planner**. - Attach a scanned application to the Pre-app permit. - Create a folder under **G:/Plan Review Center/ Plan Review Projects/ PRE-APPLICATION.** - Name the folder as "Project Name-Project type". For example, "Mercato-PRO". The applications, attachments, and review letters will be saved in this folder. - All plans should be clearly marked with a red marker (or some other easily visible marker) with the project number and type of review (i.e. PSP, FSP, rPSP). - Print an invoice for routing with due date and other information. Each reviewer should be highlighted for distribution of plans. Letters are due to planner two days prior to the Pre-application meeting. The Pre-application meeting is typically 10 business days, unless otherwise determined by the Planner. **An outlook calendar appointment should be sent out for all reviewers.** - Attach the application and all the attachments submitted with the application in PDF format to the outlook invite.
3. Planner	After the Pre-app Meeting is held: - Update the project description; - Attach the review letters, Pre-app Checklist, and the sign-in sheet to the Pre-app permit; - Issue the Pre-app permit and finalize the permit (same date as the pre-application meeting); and **Change the status of the Pre-app permit to "closed" under "Tools" then "Change Status" option.**

PRELIMINARY SITE PLAN

1. **Clerical Staff**	- Initiate the Preliminary Site Plan permit and update the project description. Project description can be found in the application. - Indicate **Occupant name** if applicable - Pass the submittal packet to the planner to assess the requirements.
2. **Planner**	Fill the cover checklist for the Site Plan Application to help clerical staff determine the relevant reviews, required permits (such as phasing, special land use), and tentative Planning Commission public hearing date, if applicable.
3. **Clerical Staff**	- Calculate Preliminary Site Plan permit fees and other necessary permit fees (based on the checklist provided by the planner). - Change the inspector box to the reviewing planner. - Add other disciplines (i.e., landscape architect, etc.) as linked names under the project and update the engineer and architect names, if necessary, under the "Names" screen of the project. **Attach a scanned application to the Preliminary Site Plan permit.** - Print the invoice (with all permit fees) for routing with due date, highlight each review, and distribute the plans. Letters are due to planner two days prior to the due date to the applicant. The applicant due date is 15 business days, unless otherwise determined by the Planner. - All plans should be clearly marked with a red marker (or some other easily visible marker) with the project number and type of review (i.e. PSP, FSP, rPSP). **An outlook calendar appointment should be sent out for all reviewers.** - Attach the application and all the attachments submitted with the application in PDF format to the outlook invite. - There is a template folder in **G:/Plan Review Center/ Plan Review Projects/ JSP** folder named "00-00 Project Name-Project Type". Copy the folder and rename it according to the new project name. - Save all the application materials forwarded by the applicant under respective Permit folder with the appropriate date and submittal. (example: Preliminary site plan)
4. **Planner**	- Initiate the **Legal permit**. - Delete the unneeded planning pre-requisites. - Refer to the BUILDING.NET PROCESS: Legal Permits and Pre-requisites Cheat sheet
5. **Engineer**	- Delete the unneeded Engineering pre-requisites. **Initiate the Legal permit for off-site easements. Drafts are required to be submitted with Final Site Plan approved prior to Stamping Sets.** - Refer to the Legal Addendum.

6. Planner	- Include the legal fee estimate, if applicable, in the review letter. **All required planning legals should be noted in the Preliminary Site Plan review letter as being required with the submission of the Final Site Plan.** - All planning legals must be approved prior to stamping set approval.
7. Planner	Once reviews are complete: - Review all the letters with the City Planner prior to sending them to the applicant; **Confirm fees are paid and attach review letters to the Preliminary Site Plan permit;** - Send review letters to the applicant; - Determine if a Revised Preliminary Site Plan submittal is required; and - Update BS&A to reflect if Wetland/Woodland Permits are required.

REVISED PRELIMINARY SITE PLAN

1. Clerical Staff	Repeat Steps 1, 3, and 4 as listed under Preliminary Site Plan.
2. Planner	- Repeat steps 2, 5 - Planning should always be charged for Revised Preliminary Site Plan. Typically, reviews recommending denial will be charged for a revised review. Other reviews are billed if the planner determines that the revisions would require additional review.

PLANNING COMMISSION/ADMINISTRATIVE APPROVAL

1. Planner (Non-BS&A)	Once all the reviews are recommending approval: **Fill out the Public Hearing Notice checklist, if applicable;** and - Determine the date for Planning Commission and City Council dates, if applicable. Note: The applicant has to go to Planning Commission prior to any City Council or ZBA for approvals.
2. Planner	Once reviews are complete: - Review all the letters with the City Planner prior to sending them to the applicant; - Confirm fees are paid and attach review letters to the Preliminary Site Plan permit; - Send review letters to the applicant; and **Prepare the Planning Commission Packet according to the PC Packet Checklist.**
3. Planner	Once the Planning Commission, City Council, or Zoning Board of Appeals (check with appropriate clerical staff) has taken action: **Attach the Action Summary to the User Defined Approval: Planning Commission;** - Add the action to the variances tab on the property; - Attach the legal agreements, if applicable, to the property such as RUD, PRO. **Rename the document with a prefix "legal";** - Update BS&A to reflect if Wetland/Woodland Permits were approved; - The following actions should be included: Special Land Use approval with description, any variances, any development agreements, and consent judgments;

4. Planner	- Issue the Preliminary Site Plan permit and Revised Preliminary Site Plan permit changing the date issued - to the Planning Commission or City Council approval date - and enter the Planning Commission or City Council approval date - as the date the permit was finalized; and - If the plan is approved administratively, the date the letters were sent should be used as the date issued and finaled for the permit. The expiration date should be adjusted manually if needed.
5. Planner (Non-BS&A)	- Stamp the plan "Preliminary Approved". ??? - Send out an email to the applicant. Save a copy of it in the project folder. - File in "Site Plans Under Review" filing cabinet with review letters.

FINAL SITE PLAN

1. Clerical Staff	- Initiate the Final Site Plan permit. - Pass the submittal packet to the planner to assess the requirements.
2. Planner	- Fill the cover checklist for the Site Plan Application to help clerical staff determine the relevant reviews and required permits (such as façade, wetland preparation, Master Deed, etc.). **Delete all the unwanted permits** – such as revised preliminary, phasing, etc. - Update all the user defined approvals. Refer **to Project Requirements Cheat Sheet for Building.Net**
3. Clerical Staff	- Calculate Final Site Plan permit fees and other necessary permit fees (based on the checklist provided by the planner). **Initiate invoice Wetlands permit preparation fees and Conservation Easements.** **Initiate the Façade permit and invoice the fees. Delete Façade permit if not required for the project** **Create an invoice for all required Planning and Engineering (off-site) legals and forward it to the applicant. All legal fees must be paid prior to distributing the review letters.** **Change the inspector box to the reviewing planner.** - Attach a scanned application to the Final Site Plan permit.
4. Clerical Staff	- Print the invoice (with all permit fees) for routing with due date, highlight each review, and distribute the plans. Letters are due to planner two days prior to the due date to the applicant. The applicant due date is 15 business days, unless otherwise determined by the Planner. **An outlook calendar appointment should be sent out for all reviewers.** - Attach the application, and all the attachments submitted with the application, in PDF format to the outlook invite.

5.	**Planner**	**Complete the Phasing Plan, Wetlands, Woodland, and Wetlands authorization requirements.** **Update all user defined approvals and delete any unnecessary permits such as Woodland and Wetlands permits and bonds.** - If **no pre-reqs are required** for a legal permit, the Planner should cancel the legal permit.
6.	**Landscape Architect**	Update the user defined approvals for permits and bonds for landscape and street trees.
7.	**Engineer**	- Delete all the unwanted Engineering permits. - Update all the user defined approvals that relate to Engineering. Refer to <mark>xxxxxx</mark> addendum.
8.	**Planner**	Once reviews are complete: - Review all the letters with the City Planner prior to sending them to the applicant; **Confirm fees are paid including Legal permit fees and attach review letters to the Final Site Plan permit;** - Send review letters to the applicant; and - Determine if a Revised Final Site Plan submittal is required.

REVISED FINAL SITE PLAN AND APPROVAL

1.	**Clerical Staff**	- Initiate the Final Site Plan permit. - Pass the submittal packet to the planner to assess the requirements. - Attach a scanned application to the Final Site Plan permit.
2.	**Clerical Staff**	- Print the invoice (with all permit fees) for routing with due date, highlight each review, and distribute the plans. Letters are due to planner two days prior to the due date to the applicant. The applicant due date is 15 business days, unless otherwise determined by the Planner. **An outlook calendar appointment should be sent out for all reviewers.** - Attach the application, and all the attachments submitted with the application, in PDF format to the outlook invite.
3.	**Planner**	- Request the Wetlands Consultants to start working on the permit preparation documents. (Confirm fees with ECT) **Request the applicant to submit the Conservation Easement documents in the Planning Review letter, if applicable. Draft Conservation Easements are to be submitted prior to the Pre-construction meeting.**

4. **Planner**	Once all reviews are recommending approval: ▪ Review all letters with the City Planner prior to sending them to the applicant; ▪ **Confirm fees are paid including Legal permit fees and attach review letters to the Final Site Plan permit;** ▪ Send review letters to the applicant; and ▪ Determine if a Revised Final Site Plan submittal is required.
	ELECTRONIC STAMPING SETS
5. **Planner**	▪ **Go to "Site Plan Stamping Set", click on Quick Entry, select Category "Planning", and double click on "stamping set approval". Update the following information when ready:** o Electronic stamping sets submitted (date): o Electronic stamping sets approved (date): ▪ Forward the information to all the reviewers for their review. ▪ Once all the information is submitted, send an email to the applicant to submit the Final Stamping Sets.
	STAMPING SETS
1. **Clerical Staff**	▪ Date stamp the transmittal sheet when Stamping Sets are submitted and give them to the project planner.
2. **Clerical Staff**	▪ Access the Stamping Set requirement in Building.net and enter the date stamp on the transmittal as the date the Stamping Sets were submitted. The status of the requirement will be changed to "submitted".
3. **Engineer**	▪ **Create an invoice for on-site Engineering legal invoices to be paid prior to Pre-Construction meeting.**
4. **Planner**	▪ Fill out the Stamping Set Checklist form. ▪ Check for all required legal documents. ▪ Make sure legal fees are paid. ▪ Send the automatically generated email to the reviewers letting them know Stamping Sets are in.
5. **Planner**	Once plans have been stamped approved by all reviewers: ▪ **Issue and finalize the Final Site Plan permit** (and any other open permits – i.e. phasing, etc., but not including the Legal permit or Façade permit). The expiration date should be adjusted manually if needed. ▪ The date the stamping sets are stamped by the Planner should be used as the date issued and finaled for the permit.
6. **Planner**	▪ Adjust the Stamping Set requirement status to "approved" and enter any Stamping Set conditions in the comments section of the requirement.

7. **Planner**	▪ Delete any unnecessary Site Plan permits and issue the Façade permit.
8. **Planner**	▪ **Review and update all required Legal permits including, but not limited to the attachments, review date, and approved date. Work with the Attorney.** ▪ Issue and **finalize the Legal permit** if no engineering legals are required and change the status of the Legal permit to "closed" under the tools, change status option.
9. **Pre-Con Team**	▪ **Review and update all required off-site Legal permits including, but not limited to the attachments, review date, and approved date.**
10. **Landscape Architect**	▪ Enter permits and bonds for landscape and street trees such as costs and additional information.
11. **Planner**	▪ Replace any file copies of the plans in the main file with their review copy and ensure the file is complete. ▪ The file should include one copy of each plan reviewed, the review letters and any pre-app plans and review letters at a minimum. ▪ All plans should be clearly marked with a red marker (or some other easily visible marker) with the project number and type of review (i.e. PSP, FSP, rPSP).
12. **Clerical Staff**	▪ **Update the "Date Spalding was given plans" in BS&A under: "Site Plan Stamping Set".** ▪ **Engineer requests 2 CD's. These needs to be given to Sarah.**
13. **Planner**	▪ **Update the notes for revised stamping sets stating the reason for revision.** ▪ **Make sure CDs are submitted with revisions for Spalding DeDecker As-Builts.**
PRE- CONSTRUCTION	
1. **Planner**	▪ **Check on status of Conservation Easements and determine a tentative City Council date for approval.** ▪ Update the BS&A once the easement is approved. ▪ Attach the recorded easement to BS&A.
2. **Landscape Architect**	▪ Enter Temporary C of O or Final C of O information after successful inspection.
3. **Landscape Architect**	▪ Enter warranty inspection results.
4. **Pre-Con Team**	▪ Issue Façade Permit, Wetlands Permit, etc. after attaching the relevant documents.