



KEY MILESTONES MEETING REQUEST PACKET
PROCESS MANAGEMENT

The Bureau of Development Services (BDS) offers several options for early assistance on projects. This packet describes one of these options and includes details on requesting a Key Milestones meeting.

Key Milestones Meeting

For projects with complicated building code, zoning, environmental, water utility, transportation and phased permit issues that require additional assistance outside of an Early Assistance, Pre-Application, or Preliminary Fire Life Safety meeting, customers may request a Key Milestones meeting with technical review staff and a Process Manager on an hourly fee basis. Key Milestones meetings will not substitute for Land Use Early Assistance meetings and are not meant to replace other meetings already provided by BDS.

Preliminary Fire and Life Safety meetings are required for all Process Managed projects and are typically held closer to permit submittal to address specific Fire and Life Safety requirements. Information on Preliminary Fire and Life Safety meetings can be found at:

www.portland.gov/bds/documents/life-safety-preliminary-meeting-request-packet and will be scheduled with your Process Manager.

Applicants who feel a collaborative discussion with City staff regarding building design and permitting would be beneficial for their project may request this meeting by submitting this completed application packet, copies of building plans or designs related to the discussion, and a list of specific questions/items to be discussed at the meeting. Within five working days of receiving your completed request packet, we will contact you to set up this meeting, request further documentation if needed, or advise you as to what an alternate next step should be if we determine that a Key Milestones meeting is not appropriate. Meeting duration will be determined based on the number of staff being requested, and whether their respective review overlaps with others. Depending on the agenda, your Process Manager may advise a meeting longer than one hour, or multiple meetings focused on specific items. Meetings will be billed on a hourly basis and coordinated before meeting scheduling. Often there will be meeting preparation time needed by review staff that will be billed on an hourly basis and communicated before the meeting scheduling. Applicants will be responsible for capturing meeting notes and meetings are for informational purposes only and no official decisions will be made. Please review the list below of available review groups and the hourly rates.

REVIEWERS REQUESTED/ FEE-PER HOUR

- PROCESS MANAGER FEE (MANDATORY) \$190.00
LAND USE SERVICE STAFF (CASE PLANNER) \$190.00
LAND USE SERVICE STAFF (PERMIT REVIEWER) \$190.00
LIFE SAFETY \$190.00
FIRE \$172.00
STRUCTURAL \$190.00
SITE DEVELOPMENT \$190.00
MECHANICAL \$190.00
WATER \$260.00
BUREAU OF ENV. SERVICES (BES) \$290.00
PLUMBING \$190.00
ELECTRICAL \$190.00
BUREAU OF TRANSPORTATION (PBOT) \$170.00

If you have questions about the submittal process, contact your Process Manager, or for general question email : BDSProcessManagement@portlandoregon.gov

KEY MILESTONES MEETING APPLICATION

The completed Application must include all the following information. A meeting will not be scheduled if items listed below are missing. Additional information such as photos, building elevations and building sections are helpful, but not required.

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|---|---|
| <input type="checkbox"/> Completed Key Milestones Application | <input type="checkbox"/> Plan Drawings (If Reference is Required) |
| <input type="checkbox"/> Specific Questions | <input type="checkbox"/> Meeting Fee (paid at time of meeting) |

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| Project Name: |
| Description of Proposed Work: |
| |
| Previous Land Use Early Assistance Case #: |
| Project Address (If no address is currently assigned, provide the Tax Account Number or "R" number): |
| Project Owner/Client: |
| Project Contact: |
| Firm Name: |
| Address: |
| Phone: Email: |
| Project Valuation: |
| Anticipated Permit Submittal Date: |
| Design Team Attendees: Names/ Email |

City Staff Requested: (**NOTE:** specific questions must be submitted for each reviewer requested)

- | | |
|---|--|
| <input type="checkbox"/> PROCESS MANAGER(MANDATORY) <input type="checkbox"/> LAND USE (CASE PLANNER) <input type="checkbox"/> LAND USE (PERMIT REVIEWER) <input type="checkbox"/> LIFE SAFETY <input type="checkbox"/> FIRE <input type="checkbox"/> STRUCTURAL <input type="checkbox"/> SITE DEVELOPMENT | <input type="checkbox"/> MECHANICAL <input type="checkbox"/> WATER <input type="checkbox"/> BES <input type="checkbox"/> ELECTRICAL <input type="checkbox"/> PLUMBING <input type="checkbox"/> PBOT |
|---|--|