

Town Council Priority Setting Study Session

March 16, 2026

Town of Portola Valley



Study Session Overview & Objectives

- ▶ **Goal:** Establish Town Council Priorities and Strategies for the next two fiscal years in collaboration with Council and Staff
- ▶ **Key Topics:**
 - ▶ Review current priority categories and accomplishments
 - ▶ Review department work plans and priorities
 - ▶ Finalized list of top priority categories, strategies, and programs

Study Session Agenda

Time	Activity	Key Focus
1:30 PM	Kick-off and Introductions	Opening remarks by Mayor and Town Staff Introductions
1:45 PM	Current Priorities and Fiscal Year Achievements	Overview of current Priority Categories and work on current Implementation Strategies (Darcy)
1:50 PM	Department Presentations	Department Work Plans, Needs, and Potential Future Enhancements (Darcy, Sarah, Tony) Q&A by Council
2:30 PM	Public Comment	
	Future Priorities	Council and staff discussions
3:45 PM	Break	<i>10-minute recess</i>
3:55 PM	Public Comment	
	Future Priorities	Council and staff discussions
5:15 PM	Next Steps	Council consensus recap and adjournment
5:30 PM	End	Closing Remarks by Mayor

Five Priority Categories



The five priority categories help establish the top projects and guide the Town based on a shared vision for each fiscal year:



Financial Responsibility and Long-term Viability



Safety



Responsible Land Use



Operational Efficiency and Effectiveness



Environmental Sustainability

Priority Programs Implemented 2025-26

- ✓ Balanced Town Budget for FY 25/26
- ✓ Recruited Town Manager, Town Clerk, and Town Engineer
- ✓ Focused on challenges confronting the Planning & Building
 - 1) Identify challenges and pain-points
 - 2) Implement plans to address the challenges
- ✓ Aligned zoning regulations with the adopted Housing Element and successfully recertified the Housing Element
- ✓ Improved communication of Town projects status to the community - updated website, Town Manager blog, newsletter
- ✓ Determined proper levels of service in collaboration with Town Council

Priority Programs Ongoing

- ❑ Complete Housing Element Amendment, removing Ford Field open space and finishing necessary zoning of additional sites
- ❑ Complete remaining audits and financial statements
- ❑ Determine long-term financial stability, including possible 2026 Ballot Measure
- ❑ Complete Safety Element update
- ❑ Create a focus on safety, based on Council initiative

Major Town Work Items

Major Work Items	25/26		26/27	
Project	Q3	Q4	Q1	Q2
	<i>Jan-March 26</i>	<i>April-June 26</i>	<i>July-Sept 26</i>	<i>Oct-Dec 26</i>
Locally Controlled Funds Ballot Measure				
Audits and Financial statements backlog				
Housing Element Amendment				
Rebuild Town Workforce				
Planning and Building operational efficiency				
Master Fee Schedule Update				
Safety Element				
Ongoing Items				
Implement Krisch & Co financial recommendations				
Fulfill Housing Element programs				
Contract Capital Improvement Projects				

Department Presentations

- Presentations are forward looking
 - What strategic projects are going to be accomplished next FY? What is needed to be a functional department? What policy questions need TC Direction? What is needed to accomplish this?
 - What's the minimum?
- Assuming the Town has additional funding starting in 2027, what are the stretch goals for your department?

Finance Department

Tony McFarlane
Finance Director

Strategic Finance Department Work Items

- Complete Past Audits and Financial Statements
- Master Fee Schedule Implementation - April 2026
- Impact Fee Nexus Study and New Fees - Jan 2027
- Annual Reporting
 - State Controller's Office and other State agencies
 - San Mateo County
- Continue implementing Kirsch Report Recommendations
- Potential Local Control Revenue November 2026 Ballot Measure - March 25th meeting

Finance Department Needs

Needs

- More robust financial policies - maintain reserve >20%
- Career tracks for Finance staff

Future Enhanced Services and Programs

- Finance Manager
- Financial Reporting through OpenGov

Strategic Finance Department Policy Discussion Topics

- More robust Finance/Budget Policies
 - Use of Reserves
 - Use of Restricted Funds - documentation and decisions about expenditures
- Staff career development tracks

Planning & Building Department

Sarah Cawrse

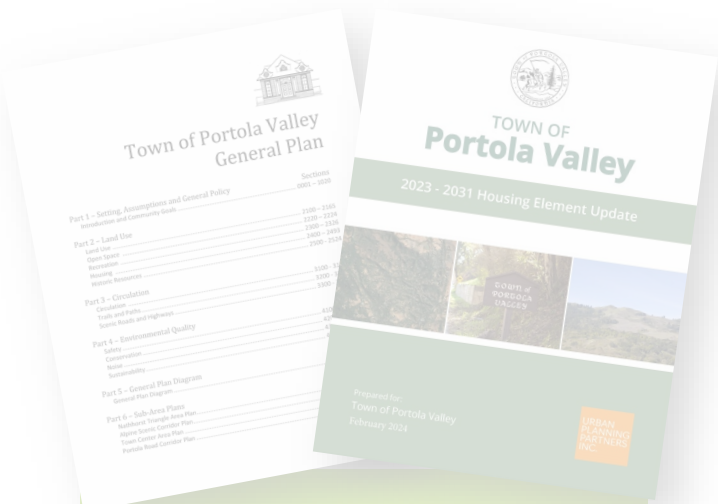
Planning & Building Director

Planning

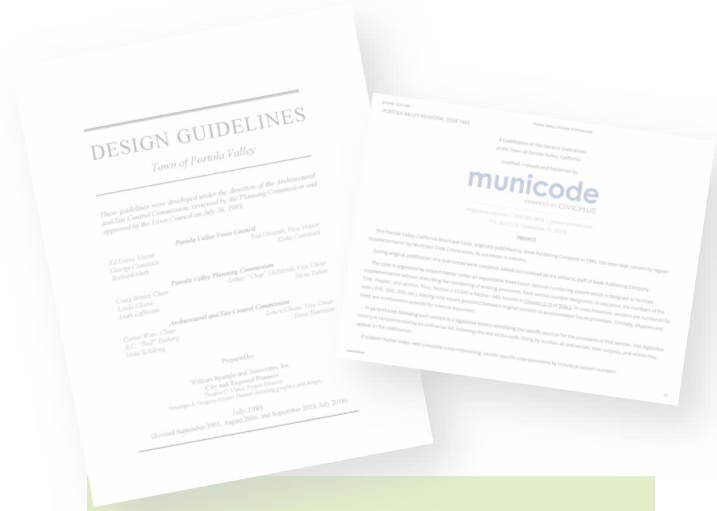
Advanced Planning

Implementation

Current Planning



- 1. General Plan
- 2. Elements



- 1. Programs & Projects
- 2. Rules & Regulations



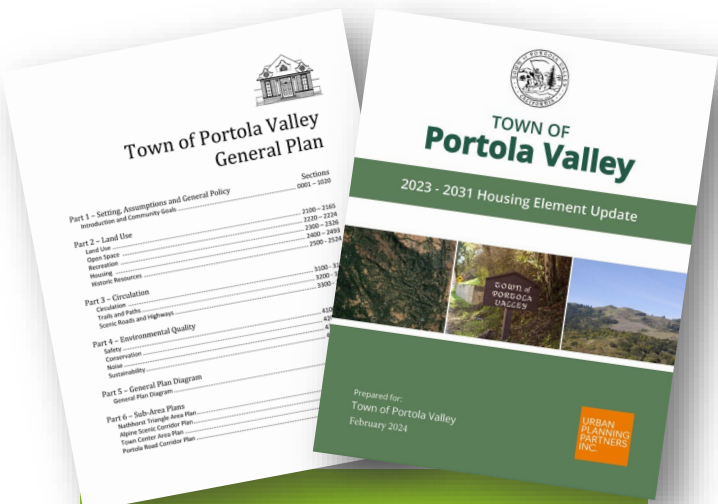
- 1. Plan Reviews
- 2. Permits

Planning

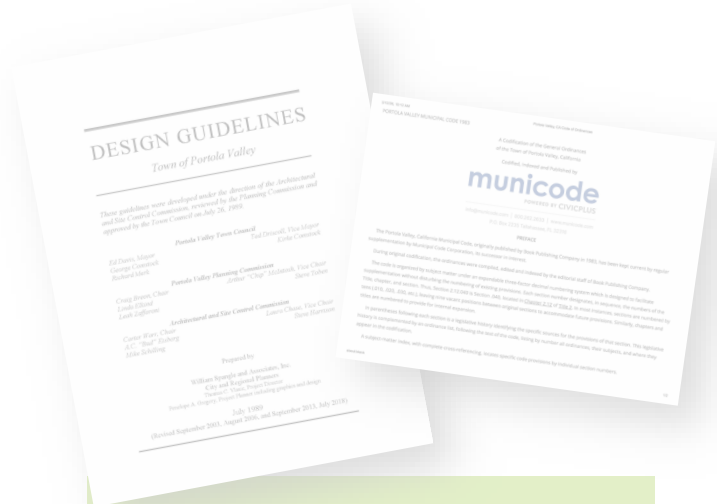
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2. Rules & Regulations



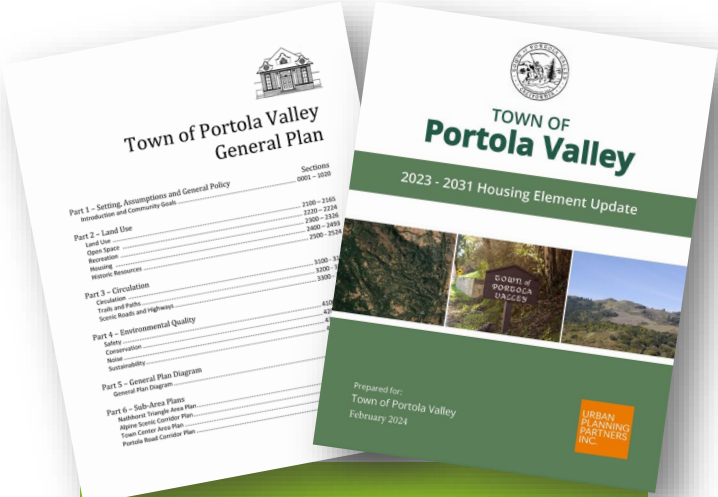
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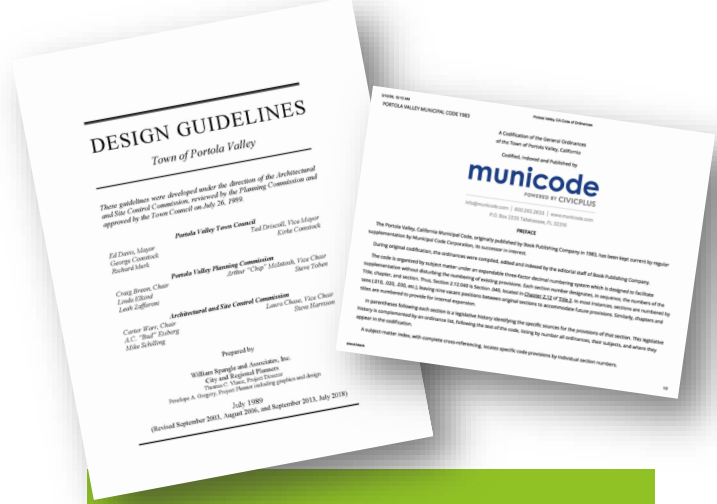
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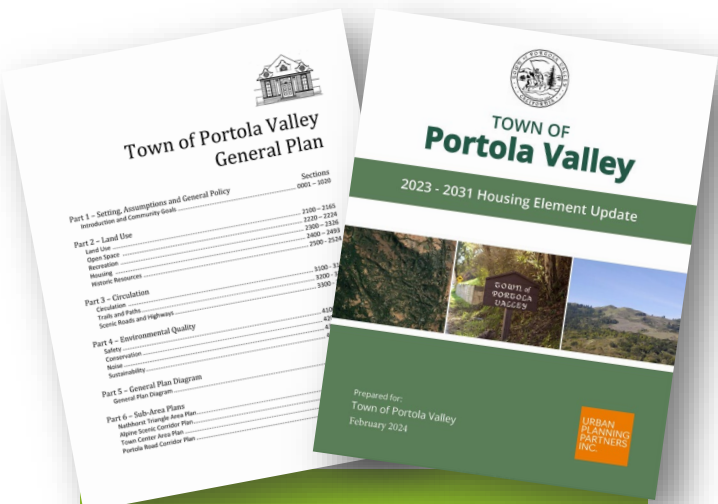
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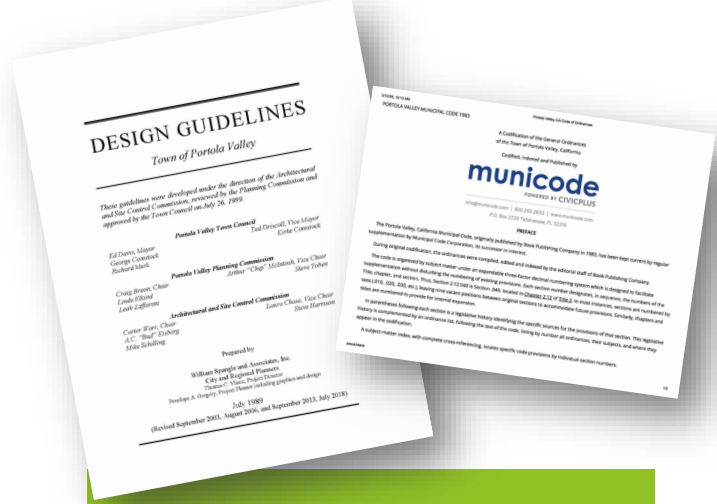
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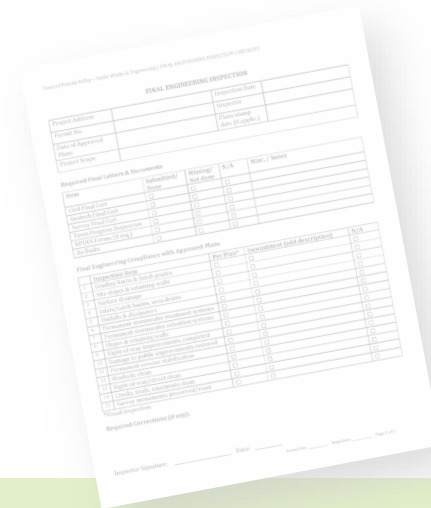
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- 2. Permits

Building

Permitting

Inspections

Code Enforcement



1. Permit Intake
2. Reviews & Approvals

1. Required Inspections
2. Compliance Inspections

1. Construction
2. Post-Construction

Building

Permitting

Inspections

Code Enforcement



1. Permit Intake
2. Reviews & Approvals

Item	Pass/Fail	Inspection (Add Description)
1. Survey/Plan		
2. Grading Plans		
3. Foundation Plans		
4. Structural Plans		
5. Mechanical Plans		
6. Electrical Plans		
7. Plumbing Plans		
8. Fire Protection Plans		
9. Other Plans		
10. Final Inspection		
11. Final Inspection		
12. Final Inspection		
13. Final Inspection		
14. Final Inspection		
15. Final Inspection		
16. Final Inspection		
17. Final Inspection		
18. Final Inspection		
19. Final Inspection		
20. Final Inspection		

1. Required Inspections
2. Compliance Inspections

CODE ENFORCEMENT PROCESS

As the Town of Portola Valley has adopted various ordinances relative to "Title 10.000", "Title 10.001", "Title 10.002", "Title 10.003", "Title 10.004", "Title 10.005", "Title 10.006", "Title 10.007", "Title 10.008", "Title 10.009", "Title 10.010", "Title 10.011", "Title 10.012", "Title 10.013", "Title 10.014", "Title 10.015", "Title 10.016", "Title 10.017", "Title 10.018", "Title 10.019", "Title 10.020", "Title 10.021", "Title 10.022", "Title 10.023", "Title 10.024", "Title 10.025", "Title 10.026", "Title 10.027", "Title 10.028", "Title 10.029", "Title 10.030", "Title 10.031", "Title 10.032", "Title 10.033", "Title 10.034", "Title 10.035", "Title 10.036", "Title 10.037", "Title 10.038", "Title 10.039", "Title 10.040", "Title 10.041", "Title 10.042", "Title 10.043", "Title 10.044", "Title 10.045", "Title 10.046", "Title 10.047", "Title 10.048", "Title 10.049", "Title 10.050", "Title 10.051", "Title 10.052", "Title 10.053", "Title 10.054", "Title 10.055", "Title 10.056", "Title 10.057", "Title 10.058", "Title 10.059", "Title 10.060", "Title 10.061", "Title 10.062", "Title 10.063", "Title 10.064", "Title 10.065", "Title 10.066", "Title 10.067", "Title 10.068", "Title 10.069", "Title 10.070", "Title 10.071", "Title 10.072", "Title 10.073", "Title 10.074", "Title 10.075", "Title 10.076", "Title 10.077", "Title 10.078", "Title 10.079", "Title 10.080", "Title 10.081", "Title 10.082", "Title 10.083", "Title 10.084", "Title 10.085", "Title 10.086", "Title 10.087", "Title 10.088", "Title 10.089", "Title 10.090", "Title 10.091", "Title 10.092", "Title 10.093", "Title 10.094", "Title 10.095", "Title 10.096", "Title 10.097", "Title 10.098", "Title 10.099", "Title 10.100".

1. Construction
2. Post-Construction

Building

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1. Permit Intake
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FINAL ENGINEERING INSPECTION form. The form includes fields for Project Address, Project Site, Date of Approved Plans, and Project Scope. It also contains a table for inspection results with columns for Item, Submittal/Date, Review/Ins Date, N/A, and Pass / Notes. Below the table is a section for Final Engineering Compliance with Approved Plans, listing various items such as Survey, Foundation, and Structural elements, each with a Pass/Fail/Inspected status and a description.

Item	Submittal/Date	Review/Ins Date	N/A	Pass / Notes
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1. Required Inspections
2. Compliance Inspections

CODE ENFORCEMENT PROCEDURES document. The document outlines the process for code enforcement, including the role of the Town of Portola Valley, the definition of a code violation, and the steps for enforcement. It also includes a section for 'STOP WORK NOTICES' and a section for 'STOP WORK NOTICES'.

1. Construction
2. Post-Construction

Planning & Building Director
(Sarah Cawrse)

Planning

Building





Planning
Commission &
ASCC

Planning & Building Director
(Sarah Cawrse)



Planning

Building

Town Staff

Current Planning

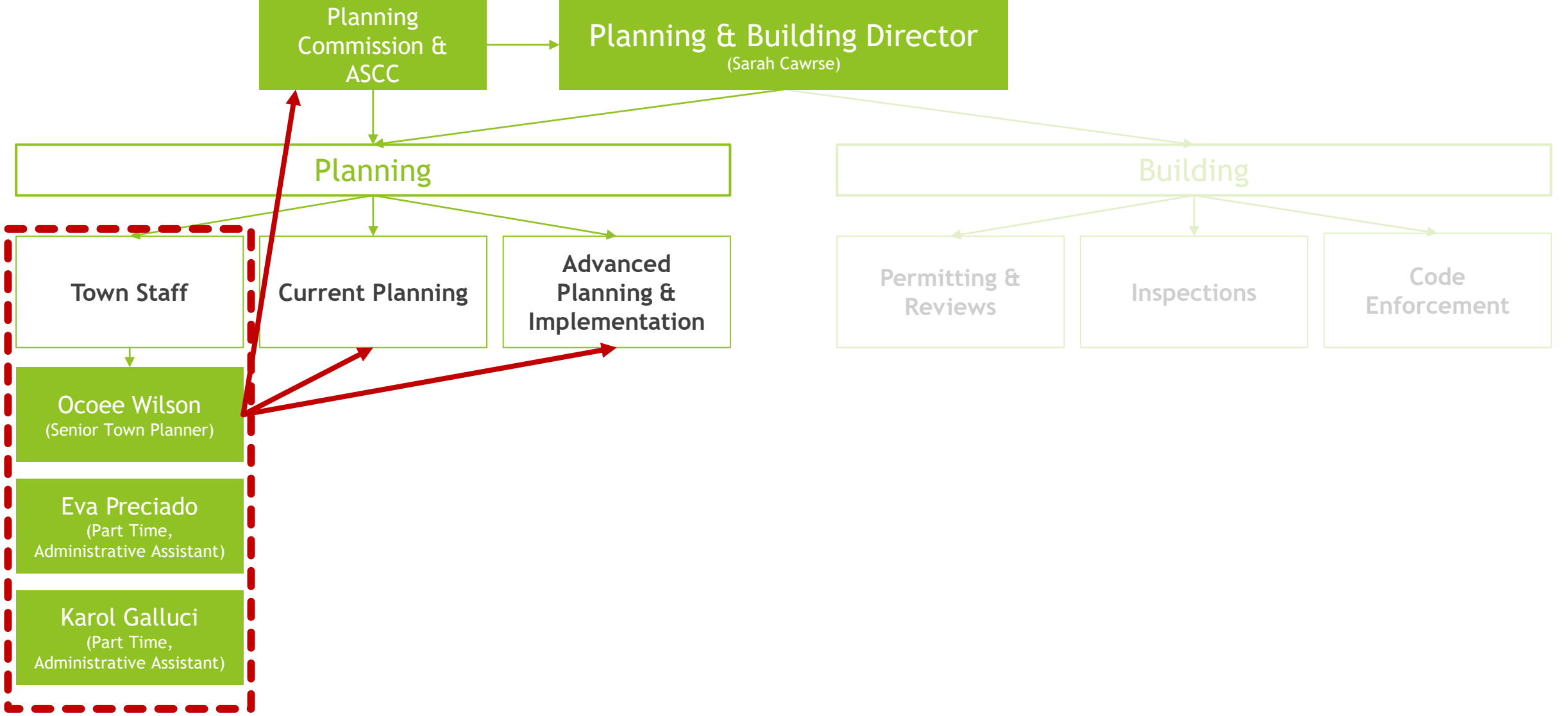
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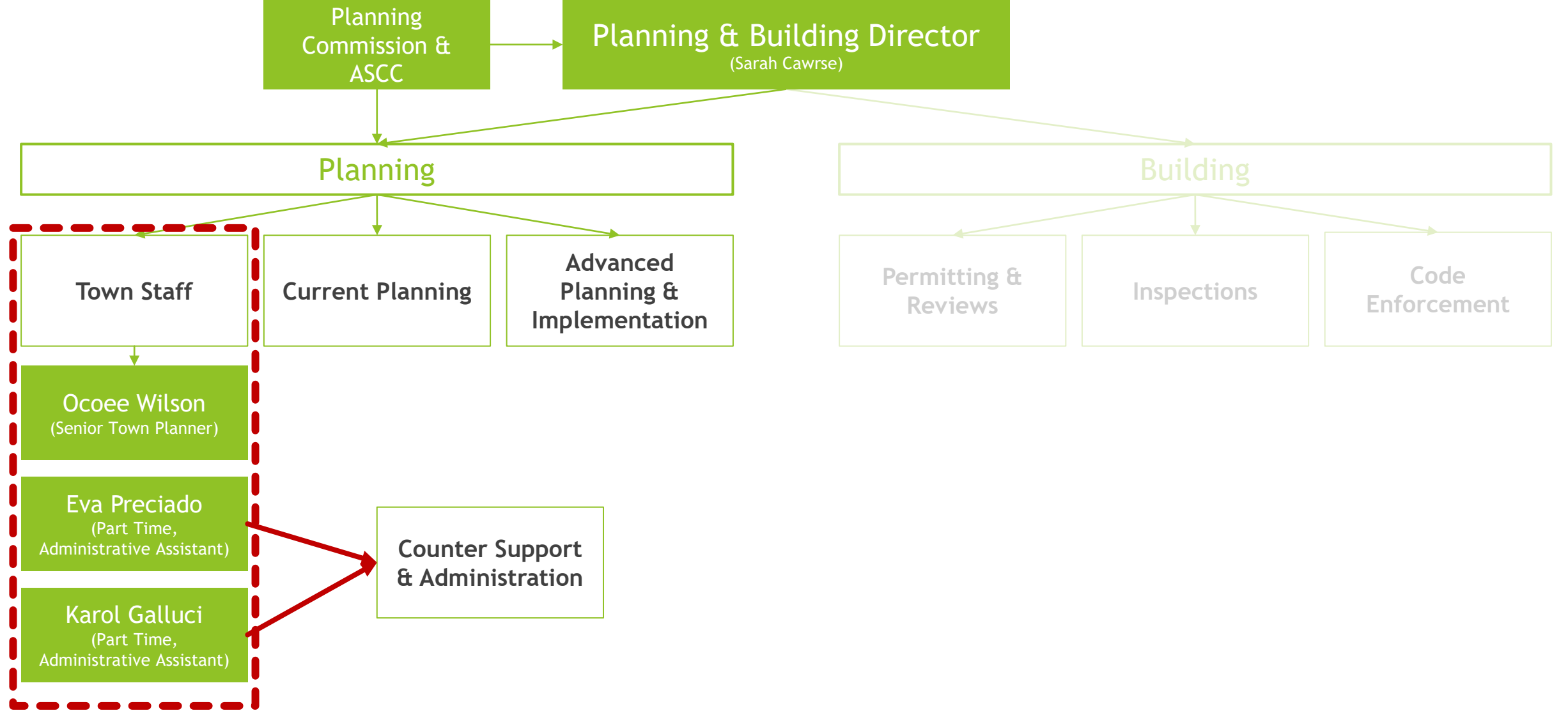
Permitting &
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Ocoee Wilson
(Senior Town Planner)

Good City
Planning

Urban Planning
Partners
(HEA & SE)

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(Part Time,
Administrative Assistant)

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HEART
(HE Programs)

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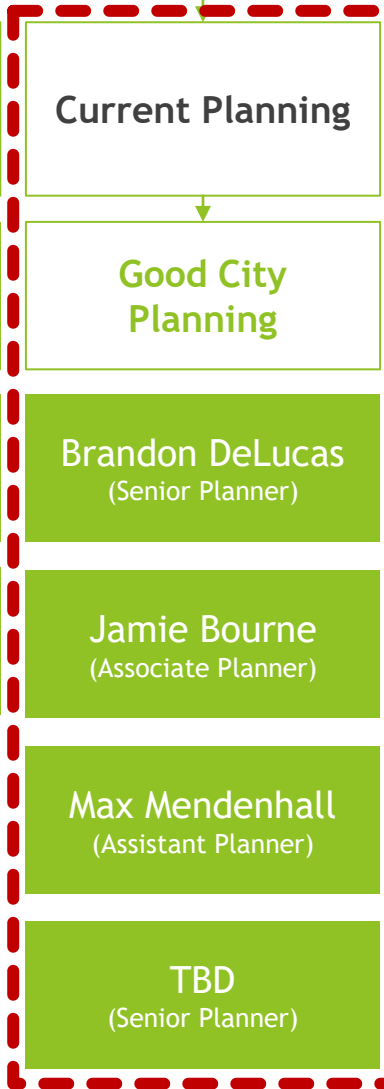
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(HE Programs)

Max Mendenhall
(Assistant Planner)

Atlas Planning
(SE)

TBD
(Senior Planner)

Lynx
(GIS)



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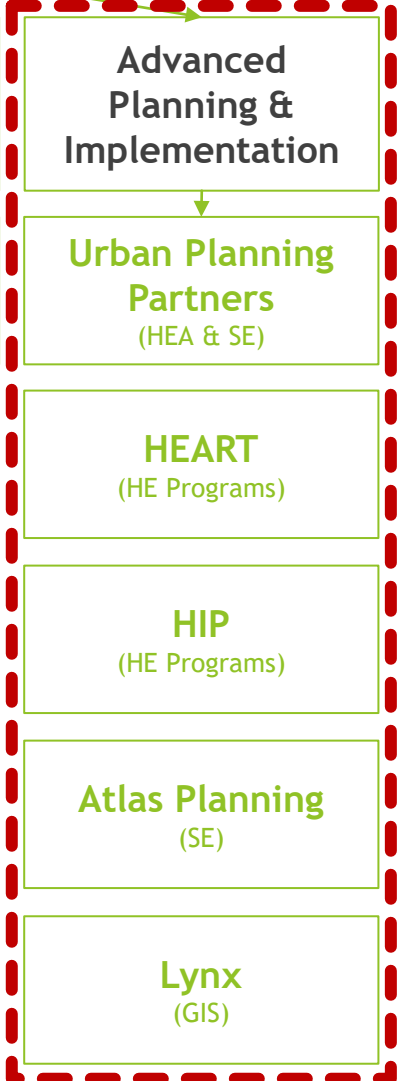
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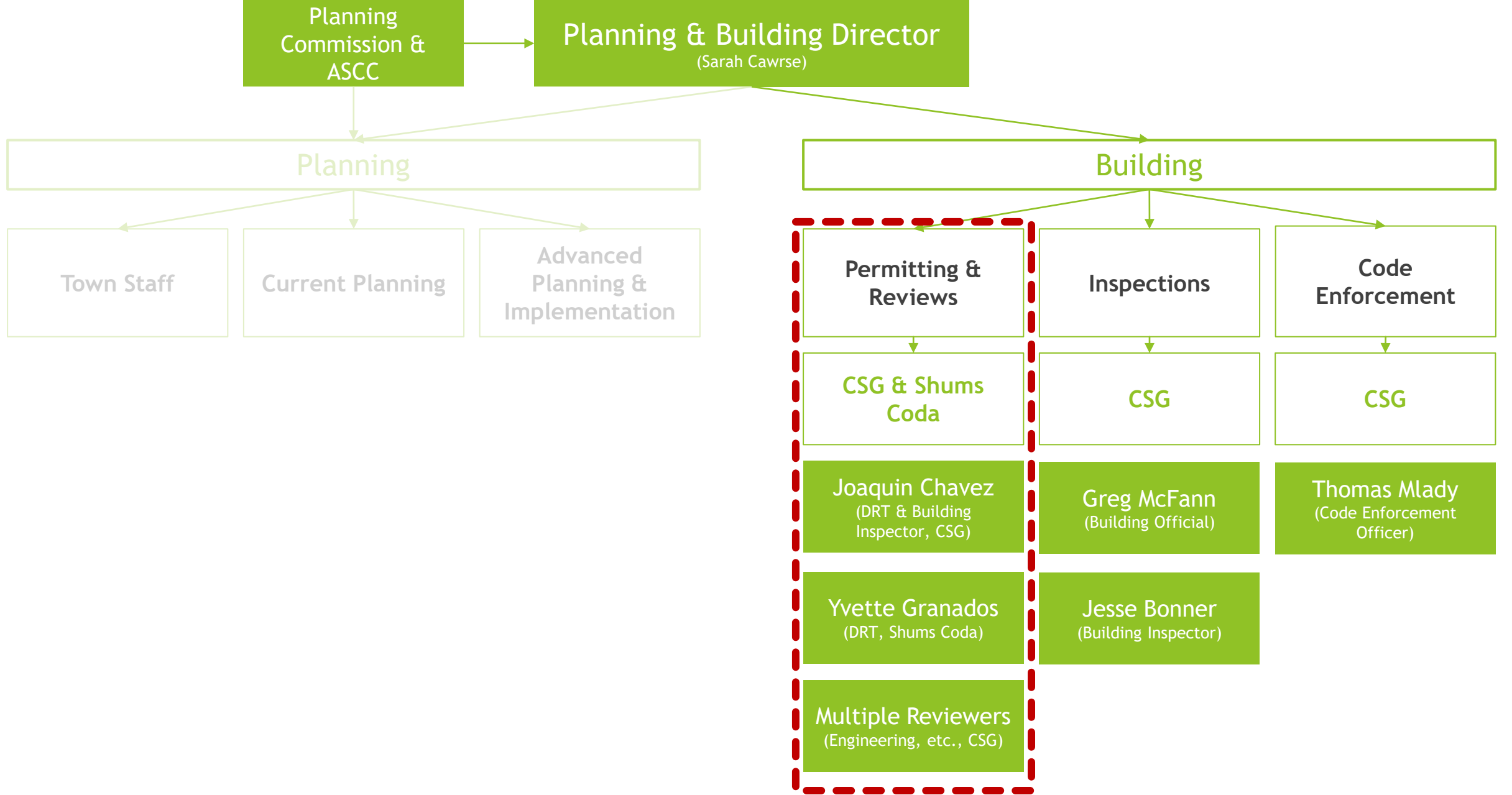
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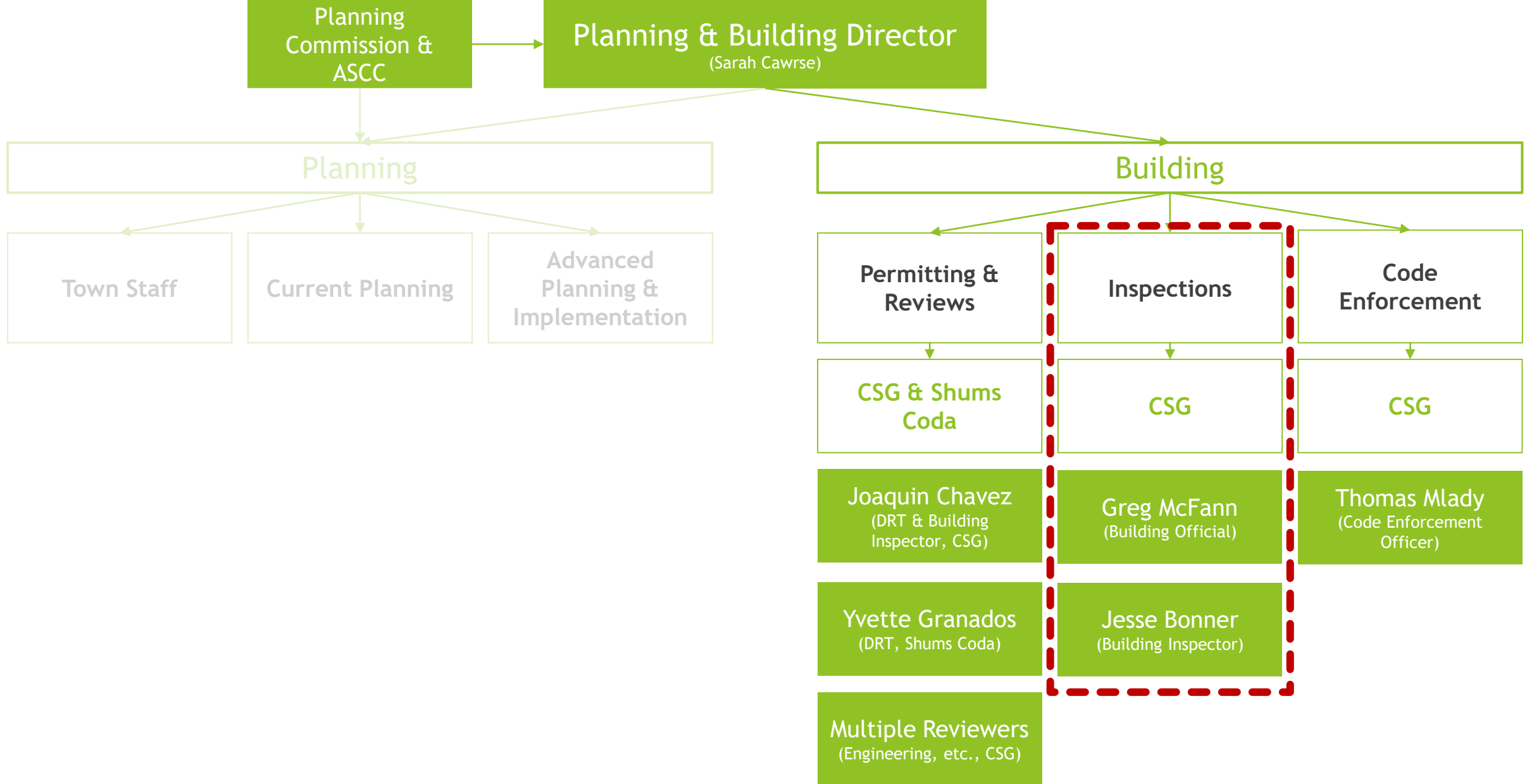
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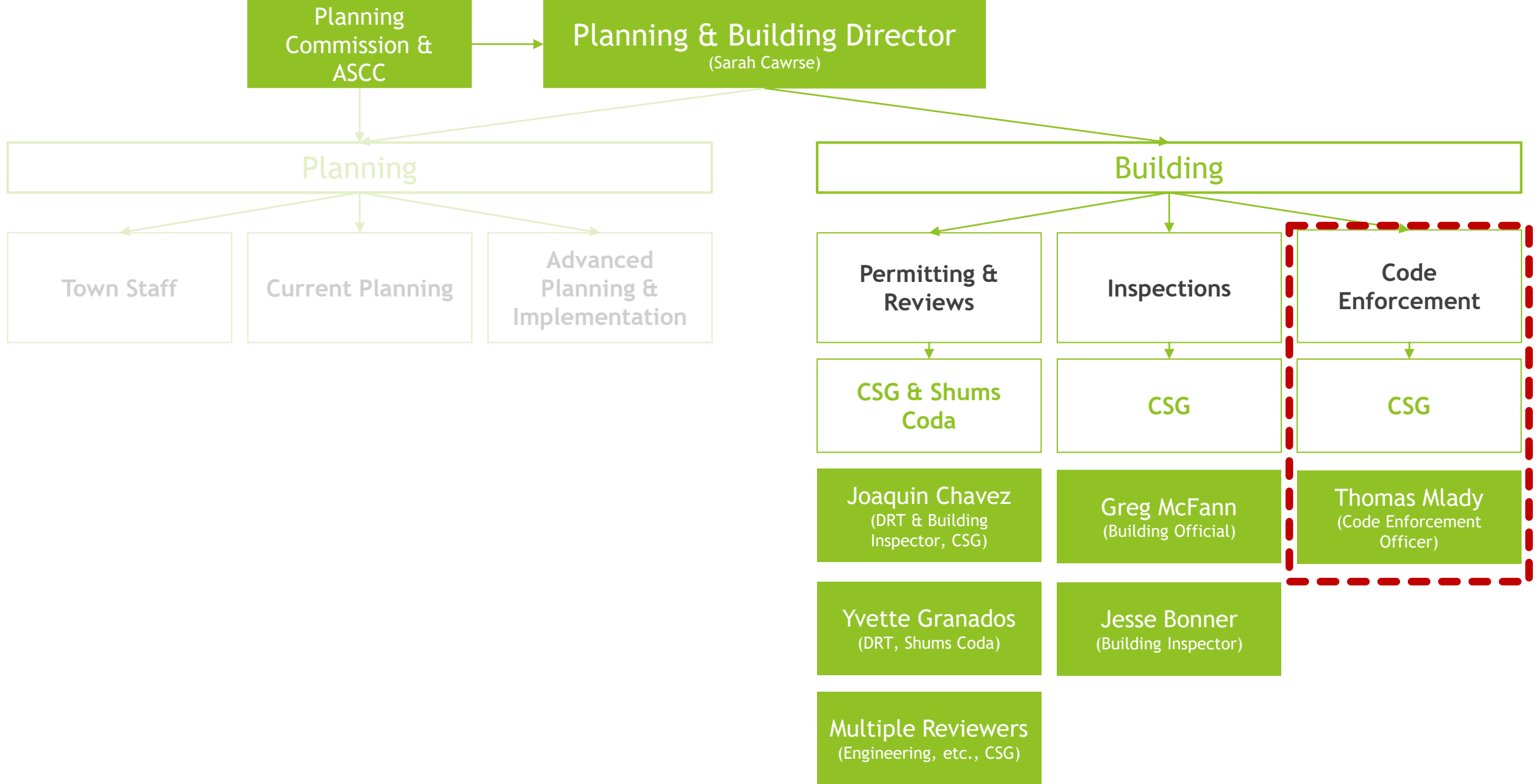
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(DRT, Shums Coda)

Jesse Bonner
(Building Inspector)

Max Mendenhall
(Assistant Planner)

Atlas Planning
(SE)

Multiple Reviewers
(Engineering, etc., CSG)

TBD
(Senior Planner)

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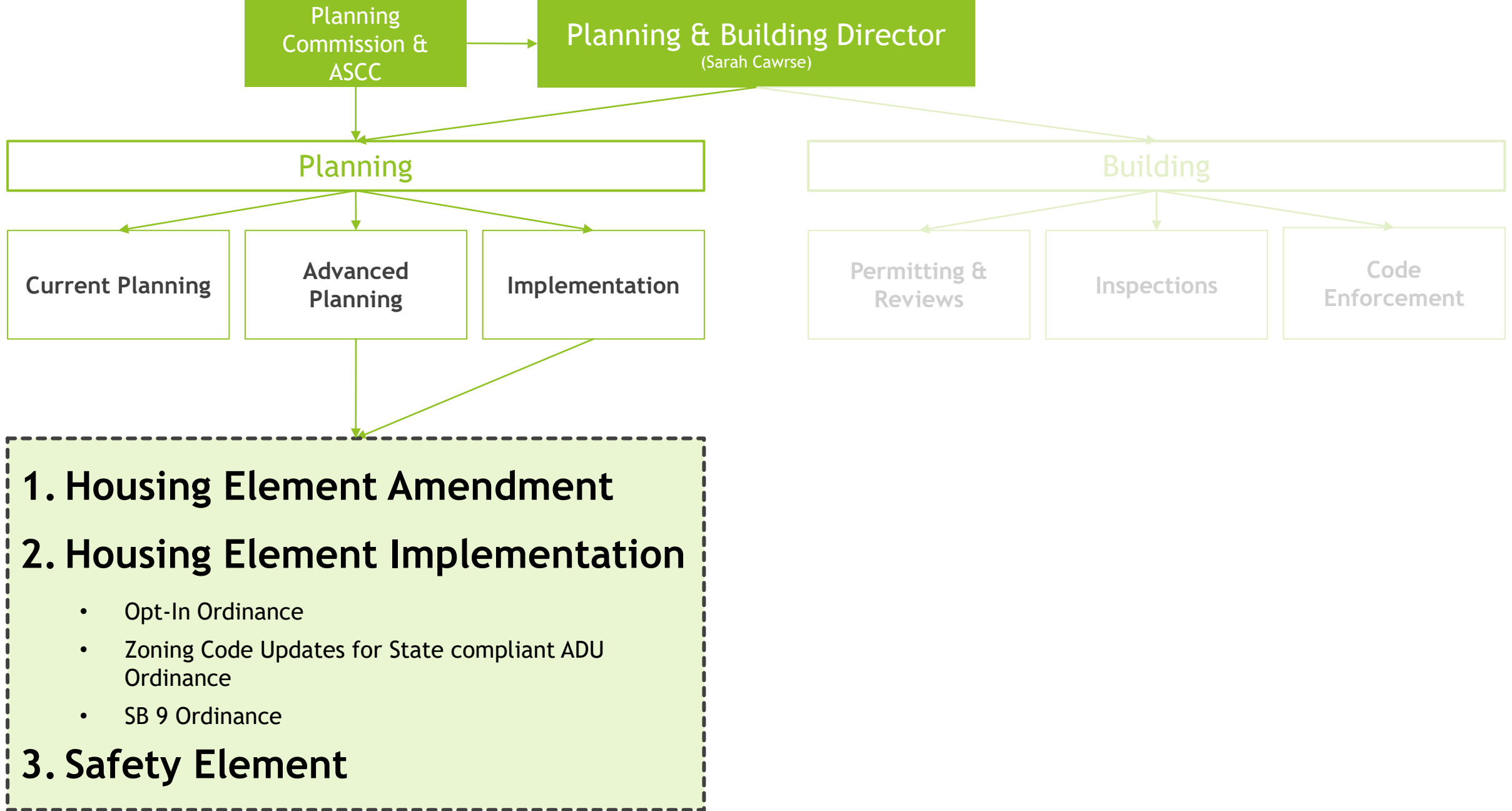
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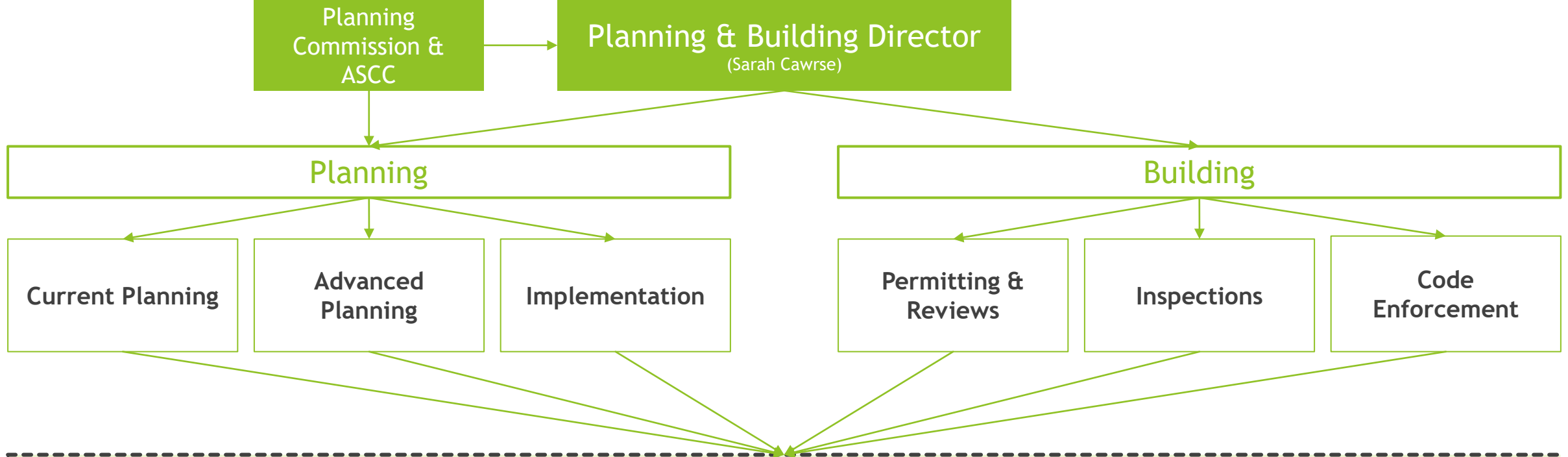
Jesse Bonner
(Building Inspector)

Multiple Reviewers
(Engineering, etc., CSG)

What is PBD working on next year?

What do we need to be functional?





4. Updated Processes, Procedures, Records, Reporting, and Financial and Data Management

- Digital permitting software (OpenGov)
- Service requests & code enforcement (OpenGov)
- Reviewer & inspections workflows (OpenGov)
- Records and reporting (OpenGov)
- Data management (OpenGov, Laserfiche, Sharepoint)
- GIS updates, permitting integration, and public viewer (GIS, OpenGov)
- Financial reporting (OpenGov)
- External communications & awareness (OpenGov, Website)

Operational Efficiency and Effectiveness

Financial Responsibility & Long-term Viability

- Hire Senior DRT or Senior DRT/Building Inspector
- Additional Development Review Technician (DRT) I/II to provide counter customer service and support the Senior DRT
- Additional Assistant/Associate Planner to provide counter customer service and support the Senior Planner
- Resources for Updated Processes, Procedures, Records, Reporting, and Financial and Data Management

Planning & Building Director

(Sarah Cawrse)

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Advanced Planning

Implementation

Senior Planner

Assistant / Associate Planner

Building

Permitting & Reviews

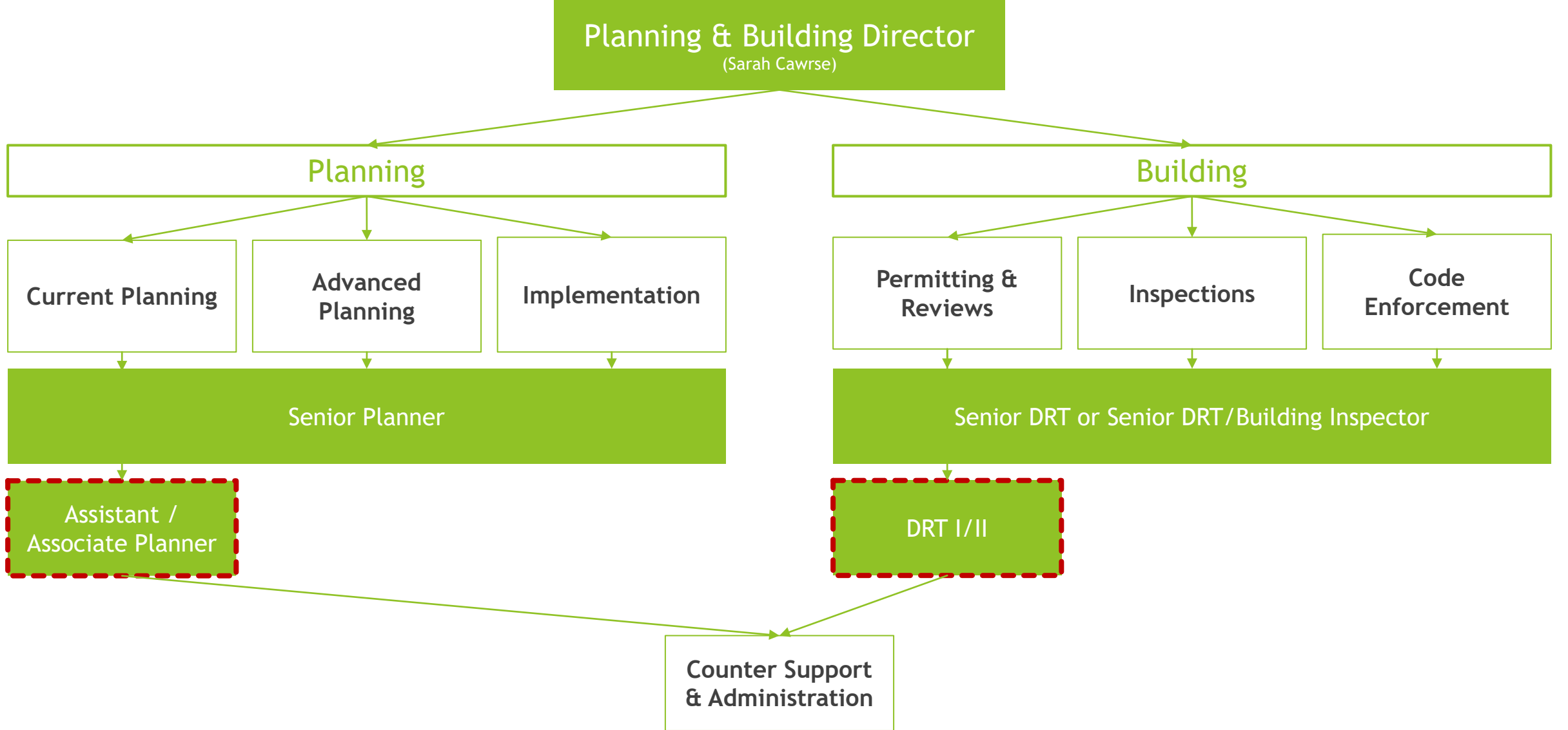
Inspections

Code Enforcement

Senior DRT or Senior DRT/Building Inspector

DRT I/II

Counter Support & Administration



 Safety

 Responsible Land Use

 Environmental Sustainability

- Resources for Advanced Planning & Implementation work
- Resources for Updated Processes, Procedures, Records, Reporting, and Financial and Data Management

Future Enhanced Services and Programs

➤ Zoning Code Updates

- Process for prioritizing one-off or holistic zoning code updates
- Resources for zoning code updates

➤ Other Advanced Planning & Implementation Work

- Safety Element Implementation
- Open Space Element

Administration and Public Works

Darcy Smith
Town Manager

Town Manager & Administration Department

Strategic Administration Work Items

- Additional locally controlled revenue/November 2026 ballot measure
- Special litigation and insurance-related claims
- Improving IT services and programs
- Ongoing technology enhancements

Administration

Needs

- Review current administration organization structure
- Hire Assistant Town Manager
- Release an RFP for IT Services

Future Enhanced Services and Programs

- Enhanced support for committees and their programs and other organization wide programs and projects
- Website and communication enhancements and updates

Public Works

Current Major Capital Improvement Projects

- Street resurfacing (Various funds- ongoing)
- Town Center Court Resurfacing (PV Fund)
- Schoolhouse IT (PV Fund)
- Ford Field Bathroom and Concession Stand (partially funded)
- Portola Valley Ranch Bridge Repairs (partially funded)
- EV Charger Project (MTC Grant)
- Town Hall Efficiency Upgrades (PCE Grant)

Capital Improvement Program & Public Works Needs

- Project Manager and support (minimum new 1 FTE) to manage CIP projects and other parks, recreation, and public facility projects
- 5-Year CIP with equipment and vehicle replacement schedule and funding allocation
- Storm Water Master Plan - comprehensive plan with assessment, modeling of future, prioritization, budget, funding strategies
- 5-Year Trails & Recreation Facilities Maintenance Plan and annual funding
- Town property lease work for Rossotti's Field, Ford Field, etc
- Alpine Road and Alpine Rd/Arastradero Road Engineering Study
- Study new ordinance requiring property owners to maintain landscaping and trees in right-of-way

Future Enhanced Services and Programs

- Funding for repair deteriorating storm drains to prevent system failure, flooding, water pollution and sinkholes
- Vegetation and brush management program to reduce wildfire risk
- Expanded road maintenance including street sweeping, pothole repairs
- Enhanced emergency preparedness
- Funding to implement PW organizational structure study
- Evacuation projects along the Alpine Road corridor

Organization Wide Needs

- Organizational structure study
- Class and compensation study for Town staff
- Analysis of staff career tracks
- Policy for Town staff merit increases
- Sustainable financial planning
- Transparent financial reporting
- Town Committee projects and programs workflow guidelines

Questions?