



**PALM BEACH COUNTY
 PLANNING, ZONING AND BUILDING DEPARTMENT
 ZONING DIVISION**

POLICY AND PROCEDURES

FROM: Jon MacGillis, ASLA, Zoning Director
SUBJECT: Policies and Procedures for Processing Zoning Courtesy Notices
PPM #: ZO-O-038

ISSUE DATE
 2/27/2020

EFFECTIVE DATE
 2/27/2020

AUTHORITY: Unified Land Development Code (ULDC), Article 2.B.5.C, Courtesy Notice.

PURPOSE: To establish procedures for County staff tasked with preparing and mailing Courtesy Notices for Zoning Public Hearings or Meetings. These Applications are subject to Zoning Commission (ZC), Board of County Commission, or Development Review Officer review for approval, approval with conditions, or denial. Also, to establish guidelines for staff oversight for quality control, coordination between Zoning, Information System Services (ISS), and Certified Mailing Solutions (CMS) (or other PBC contractor), along with the prompt and efficient resolution of any issues

BACKGROUND: ULDC Table 2.B.5.A, Notification Applicability, specifies which Zoning Applications are subject to Courtesy Notice requirements. Upon being deemed sufficient, applications are reviewed by the Project Manager (PM) and Section Supervisor for compliance with ULDC and other applicable requirements, and those that are certified each month are scheduled for the appropriate Hearing/Meeting. Upon certification, Courtesy Notices are prepared and proofed by the PM in ePZB, and sent to the Section Supervisor for review and edits. Once the PM and Section Supervisor sign off on the final Courtesy Notices, they are merged by the Section Zoning Tech and queued in ePZB for ISS and CMS to process.

Additional procedures are established to allow for case-by-case evaluation in the event of Staff, CMS or Applicant error, the latter of which may include failure to pay mailing fees, provide International mailers, or other scenario that may require mailing delay, postponement, resending of notices, etc.

PROCEDURES: The Zoning Division has automated the processing of Courtesy Notice Letters, Mailing Lists and initiation of Domestic mail by CMS, through ePZB. However, the establishment of training manuals, staff training and effective quality controls are required to ensure that information manually entered into ePZB is correct, which includes: maintaining a standard Courtesy Notice template; steps to verify the accuracy of application requests, summary, affected area, mailing boundaries and any additional interested parties; adherence to critical deadlines, which includes use of the Zoning Staff calendar; and, additional ISS staff tasks and responsibilities. This includes additional procedures for International mailings which are not processed by CMS.

Detailed instructions and training manuals on how to create the Mailing Lists, merge Courtesy Notices Letters, and process mailings through the CMS are maintained and posted on the Zoning Intranet webpage at: <https://pbcportal.pbcgov.org/PZB/Pages/Zoning.aspx>. Future updates to this PPM will

require the Section Supervisor to ensure that updates to the Training Manual and the Zoning Technical Manual are processed concurrently. The deadlines for processing Courtesy Notices shall be in accordance with the Annual Zoning Staff Calendar and/or timeframes outlined in Courtesy Notice Training Instructions.

The following procedures shall be followed by County Staff and Consultant (CMS) to process the mailings of Public Hearing Courtesy Notices:

Zoning Staff – Preparing Notices and Mailing Lists:

1. When an application has been certified to proceed to a Public Hearing or Meeting, the PM shall update ePZB to re-verify the correct PCNs, requests and Hearing or Meeting dates, and upload the appropriate application summary. The PM will also verify that the property notice screen has been populated in ePZB and insert the location map (if applicable) on the Notice, and merge a Draft Courtesy Notice.
2. The applicable Supervisor will coordinate the use of a peer review system, which will require the PM to coordinate with one or more designated peer reviewers to proof the Draft Courtesy Notice, prior to submittal to the Supervisor for final review.
3. Assigned Zoning Staff (Zoning Technician or Secretary) will use ePZB to: 1) Generate the Mailing List and Maps, and, 2) submit to the PM for review and approval. The PM shall verify that the Mailing List and Maps are based upon the correct parcels (affected area), and whether or not additional parcels need to be included based on whether “*adjacent property within the mailing boundary is owned by the Applicant or a related entity*” or if any additional interested parties need to be added that may not own real property within the specified boundaries, in accordance with ULDC Table 2.B.5.C, Courtesy Notice Requirements.

Courtesy Notice Fees:

4. The Agent is responsible for paying for Courtesy Notices and submitting prepaid International mailing envelopes, within five (5) working days of certification and/or prior to 15 working days of the scheduled Hearing or Meeting:
 - a. Zoning Staff shall send the Agent the Mailing List with fee breakdown for Certified and 1st Class mailings, and highlight any **foreign addresses** (notifying of domestic postage fees and International envelopes/postage due).
 - b. The Agent will confirm payment for domestic mailing fees and provide prepaid International stamped envelopes to zoning, in accordance with USPS International Addressing and Label Formats, (<https://www.usps.com/international/preparing-international-shipments.htm>).

Zoning Staff – Procedures for Initiating Mailing:

5. Domestic Mailing (CMS): Zoning Staff shall send through the automated ePZB process the Courtesy Notices for each batch of applications to CMS 15 working days prior to the scheduled Hearing or Meeting, for mailing to the public. (Refer to instructions on internet page: <https://pbcportal.pbcgov.org/PZB/ZonPDF/Courtesy%20Notices%20Mailing%20-%20Instructions.pdf>)
 - a. An ePZB automated notification of the Mailing List will be sent to ISS, notifying ISS that an order of CMS Courtesy Notices is ready for mailing. Copies of the notification will be sent to assigned Zoning Staff.
 - b. Staff should ensure that Supervisors are copied on all automated email from ISS.
6. International Mailing: Zoning will complete the International mailing to each foreign address with the envelopes provided and will receive and retain the proof of receipt for record keeping (scan and attach to each application in ePZB).

Zoning Staff – Late or Incorrect Courtesy Notices:

7. **Notices are Late:** If a specific Courtesy Notice is incomplete, including pending fee payment or International envelopes, by the cut off time for sending notices to CMS, staff should send the rest of notices to CMS so as not to be late with entire batch. Staff shall advise the applicable Section Supervisor to confirm if a late notice may be processed, or if the Hearing or Meeting must be postponed. Once a late notice is corrected and ready, it may be sent to CMS.
8. **Notices are Incorrect:** In the event an error is identified in the Courtesy Notice after transmission to CMS and/or delivery of International mailing to USPS, the PM shall immediately communicate with their direct Supervisor and/or the Section Head (Zoning Director and Deputy Director shall also be notified) and coordinate the following:
 - a. Contact ISS immediately to retrieve the incorrect Courtesy Notice from the mailing batch. ISS may be able to pull the Notice if not already sent to CMS for processing.
 - b. If CMS notices are pulled and not mailed, then the Courtesy Notices may be corrected and sent. The timing of any mailing will be contingent on number of days delayed and whether International mailings were sent, or not. In either case, a postponement of the application from the Hearing or Meeting may be necessary. Supervisors will assist with these decisions.
 - c. In the event Courtesy Notices were mailed with errors, the PM shall immediately contact the Agent and advise if revised mailings and/or application postponement will be required.
 - d. If revised domestic and/or International mailing is required, then the County may be responsible for covering the costs, depending on the reason for the error. Zoning Staff shall notify the Zoning Director or Deputy Zoning Director if there are any issues with the process of mailing the Courtesy Notices. The PM shall coordinate with their Supervisor and/or Section Head to prepare a summary of the incident for presentation to the Zoning Director and Deputy Director, to affirm how to proceed with any revised mailings. The Zoning Director shall coordinate with the PZB Executive Director and County Attorney if any action needs to be taken (such as revised notices, inform Commissioners, inform Applicants, etc.).

ISS Staff Requirements:

9. ISS will receive the ePZB automated notification that a Mailing List was created and is ready to be sent to CMS mailing company. Zoning will be copied on all emails by ISS and CMS company through out this process. Staff should follow-up if no email is received.
10. ISS will execute the batch job to create PDFs of the Notices (they will save notices on X drive) and create Excel files for Certified Mailing Solutions (CMS).
11. ISS will verify the letter count and send files/order to CMS, with copy to Zoning Staff.
12. **If there are Issues:** ISS notifies Zoning & ISS staff (**Reply All**).
13. **If No issues:** ISS zips the Excel & PDF files and File Transfer Protocol (FTP) files to CMS to the assigned account.
14. ISS will **Reply All** to all emails and forward to the CMS (3) assigned employee(s).
15. CMS **Reply All** to ISS email – confirming receipt of email and data.
16. ISS will download and save the Property Notices here X:\ftp_dwnl\Courtesy_Notice\Public_Hearing.

Zoning Staff – Verifying and Saving Manifest:

17. The CMS Web Site (<http://trackcertifiedmail.com/>) should be updated within 2 hours of receipt of the information and will provide an email confirmation. If no confirmation email is received, contact CMS at (205) 319-6642 or (800) 946-3274 ex 26, or via email at [mailto: support@mycertifiedmailing.com](mailto:support@mycertifiedmailing.com).
18. CMS will “**Reply to All**” if any FTP issues occur. Issues will be handled by ISS staff.
19. CMS UserID and Password are required, refer to CMS Training Manual

(http://pzbintranet/zoning/manuals/net_post_steps_06_02_08.pdf):

- **Administrative Variance User Id/Password** – (see Training Manual)
 - **Community Development User Id/Password** – (see Training Manual)
20. Zoning Staff shall verify that the manifest/ mailing report (Post Office accepts County mailing) has been created on the CMS website. This is done the day after the mailing is sent to CMS. Go to CMS at <https://www.trackcustommail.com/LoginForm>, and login using the login/password for the appropriate section; enter mail date and choose the sent date for CMS. For Community Development, there should be two manifests for each mailing (one certified mail and one first class mail) and for Administrative Variance there should be one manifest.
21. Zoning Staff shall be responsible for downloading and saving the manifest at least 2 days prior to the Hearing/Meeting, in the following folders:
- **Public Information:** <U:\Zoning\ARCH-LAND\2018\Administrative Variances\Type 1\Manifest>; and,
 - **Community Development:** <U:\Zoning\CD\Administration\Mailing Manifest>.
22. Zoning Staff shall convert and save the PDF courtesy notices from the X:drive (saved here by ISS, see #16 above) to ADA compatible using Adobe.
23. Zoning Staff shall send an email to ISS Web Services to post the Courtesy Notices to the Web (must be ADA compatible PDF), with copy to the Zoning Director, Principal Planner, Senior Planners, Zoning Technicians and Customer Service Manager, and any other assigned staff. The template can be found in the following folder: <U:\Zoning\CD\Administration\Mailing Manifest> (document name: [emails-Send Notice to WEB](#)). Be sure to attach the PDF Courtesy Notices that are saved in: X:\ftp_dwnl\Courtesy Notice\Public Hearing.
24. Zoning Staff shall send an e-mail with the Courtesy Notices attached to the BCC Aides, with copy to the same staff as above. The template can be found in the following folder <U:\Zoning\CD\Administration\Mailing Manifest> (document name: [email-Courtesy Notices to Commissioners](#)). Use the notes that you made on the Result List about each BCC district for each application; attach the Courtesy Notices.



Director

Supersession History:

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