

# Selectboard Onboarding Packet Table of Contents Template



## Selectboard Onboarding Packet - Suggested Table of Contents

A Word version of this page is available [HERE](#) for ease of use.

**Note:** Scroll down for a Quick Start Guide at the bottom of the Table of Contents

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### 1. **Welcome & Overview**

- 1.1 Welcome letter from the Selectboard Chair
- 1.2 About our town (quick facts and map)
- 1.3 Purpose of this packet and how to use it
- 1.4 Key contacts and "who to call first"

### 2. **Roles, Responsibilities & Governance Basics**

- 2.1 What the Selectboard does (plain language overview)
- 2.2 Expectations for individual board members
- 2.3 Relationship to Town Meeting and the voters
- 2.4 Relationship to Town Manager / Administrator (if applicable), Town Clerk, Town Treasurer, Listers, Auditors, etc.
- 2.5 Relationship to other boards, commissions, and committees
- 2.6 "The board acts as one body" – decision making in public meetings

### 3. **Legal & Ethical Basics**

- 3.1 Open Meeting Law – summary and local practices
  - 3.1.1 What counts as a meeting
  - 3.1.2 Warning and agenda requirements
  - 3.1.3 Executive session – when and how



## 3.2 Public Records & Transparency

### 3.2.1 What is a public record

### 3.2.2 Email, text, and social media as public records

### 3.2.3 Basic retention and access rules

## 3.3 Conflict of Interest & Ethics

### 3.3.1 Local conflict of interest policy

### 3.3.2 Disclosure and recusal – practical examples

## 3.4 Where to go with legal questions

## 4. How the Selectboard Operates

### 4.1 Regular meeting schedule, locations, and format

### 4.2 Rules of procedure / meeting rules

### 4.3 How agendas are set (and how to request an agenda item)

### 4.4 Meeting materials: how and when you'll receive packets

### 4.5 Minutes: who prepares them, how they're approved and posted

### 4.6 Public comment – local practice and ground rules

### 4.7 Communications:

#### 4.7.1 Working with staff (chain of command)

#### 4.7.2 Email etiquette and group communications

#### 4.7.3 Speaking with the media and on social media

## 5. Town Finances & Budget Overview

### 5.1 How town government is funded (revenue overview)

### 5.2 Current municipal budget (summary pages)

### 5.3 Capital plan and equipment/facility replacement schedule



- 5.4 Current debt (loans, bonds) – summary
- 5.5 Grants – major active grants and local grant policy
- 5.6 Budget calendar and when key financial decisions are made

## 6. **People & Organizational Structure**

- 6.1 Contact list – Selectboard, key staff, and department heads
- 6.2 Simple organizational chart (voters, board, manager, departments)
- 6.3 Department overviews (highway, water/wastewater, public safety, etc.)
- 6.4 Overview of boards, commissions, and committees
  - 6.4.1 What they do
  - 6.4.2 How members are appointed
  - 6.4.3 How they interact with the Selectboard

## 7. **Local Priorities & Major Projects**

- 7.1 Top 3–5 board priorities for the next 1–2 years
- 7.2 Snapshot of 2–4 major active projects
  - 7.2.1 Project purpose and background
  - 7.2.2 Funding sources (grants, loans, local funds)
  - 7.2.3 Timeline and upcoming milestones
  - 7.2.4 Upcoming decisions for the Selectboard

## 8. **Practical “HowTo” Tip Sheets (1–2 pages each)**

- 8.1 How to get an item on the Selectboard agenda
- 8.2 How to request information or reports from staff



- 8.3 How to handle calls/emails from residents
- 8.4 How to raise concerns about staff or operations
- 8.5 Quick reference: who to ask for policy, legal, and training help

## 9. **Organizational Meeting & Annual Cycle**

- 9.1 Organizational meeting checklist (annual "reset" - see VLCT's [Checklist](#))
- 9.2 Oath of office and appointments
- 9.3 Annual policy review list (rules of procedure, conflict of interest, etc.)
- 9.4 Key dates on the town's annual calendar (budget, Town Meeting, tax setting)

## 10. **Board Development & Training**

- 10.1 Ideas for Selectboard retreats and work sessions
- 10.2 Orientation timeline for new members (first 2 weeks, 2 months, etc.)
- 10.3 VLCT and other training opportunities
- 10.4 Local expectations for ongoing learning and board development

## 11. **Appendices (As Needed)**

- A. Current rules of procedure
- B. Municipal Ethics Code
- C. Key ordinances or policies frequently used by the board, including Code of Ethics Investigation and Enforcement Ordinance (see [VLCT's model ordinance here.](#))
- D. Map(s) – [Town Highway Map](#), State Designated areas (villages or downtown), facilities, project sites
- E. Links and resources (VLCT, Secretary of State, town website)



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## Quick Start Guide!

You can trim or expand sections based on your capacity. A basic starting onboarding packet could include:

- **Section 2 -- Roles, Responsibilities & Governance Basics.** Available in VLCT's [Selectboard Handbook](#).
- **Section 3 -- Legal & Ethical Basics.** Available from VLCT's resources on [Vermont's Open Meeting Law](#); [Public Records](#); and [Ethics and Conflicts of Interest](#).
- **Section 4 -- How the Selectboard Operates.** Provide a copy of your Board's [Rules of Procedure](#) and information about your regular meeting schedule, locations, and format.
- **Section 5 -- Town Finances & Budget Overview.** Provide a copy of the Town Report, which includes the Town's budget.
- **Section 6 -- People & Organizational Structure.** Provide a current list of contact information. The Town Report is a good reference in lieu of a current list.
- **Section 7 -- Local Priorities & Major Projects.** The Selectboard's Report in the Town Report may be a source of information about local priorities and major projects.
- **Section 8 -- Practical "How-To" Tip Sheets.** Including a page with one or two tips is a good place to start – see templates in the Selectboard Tools & Templates in the [Municipal Operations Support Team's](#) section of the VLCT website.

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