Selectboard Onboarding Packet Table of Contents Template

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Selectboard Onboarding Packet - Suggested Table of Contents

A Word version of this page is available HERE (DOCX, 30.11 KB) 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

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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

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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 "How To" 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

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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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