Newly Elected Official Guide Checklist

Pre-Election

- ☐ Welcome Letter
- ☐ Candidate meeting/briefings

Administrative (Communications & Executive Assistant)

- ☐ Executive Assistant main point of contact for City Council
- ☐ Notify all affiliated government agencies of the changes in your elected officials
- ☐ Update city website with new Council picture & contact information
- ☐ Complete the GMA survey and return to GMA so the changes can be made in database
- ☐ Change stationary and purchase new name plates, name tags, business cards, and any city issued equipment for council
- ☐ Provide Ethics form filing schedules and website info and who to contact for assistance https://ethics.ga.gov/
- ☐ Access to BNET
- ☐ Signature template for email
- ☐ Mailbox at City Hall

Newly Elected Officials Guide

- ☐ Checklist
- ☐ Provide a KEY FACTS page of relevant information about the city:
  - ▪ # Of employees
  - ▪ # Customers
  - ▪ Services provided by the city
  - ▪ Services not provided by the city
  - ▪ Listing of City owned property
- ☐ Provide officials with copy of city's zoning and other maps
- ☐ City's Organizational Chart
- ☐ Meeting Schedules
- ☐ Prepare list of city committees & boards including mission, members, contact information, and meeting dates
- ☐ Prepare a city contact list with cell numbers
- ☐ City Council Rules including Rules of Decorum
- ☐ Personnel Policy Handbook
- ☐ Travel and Training Policies
- ☐ Procurement Policy
- ☐ Elected Official Expense Budget
- ☐ City's Budget & Financial Reports
  - ▪ Explain what it means and how it is used in city operations
  - ▪ Budget process
- ☐ Copy of Capital Budget and information on projects

- ☐ Rate & Fee Schedules
- ☐ City Council Advance
- ☐ Master Plans
- ☐ Knowledge Management
- ☐ Security including Keys, Panic Buttons, Cameras, etc.
- ☐ Business Continuity
- ☐ Corporate Identity Standards & Document Templates
- ☐ Training
  - ▪ City Attorney
  - ▪ Planning & Zoning
  - ▪ Provide information on newly elected officials training classes and registration information
  - ▪ Provide information on GMA's training program https://www.gacities.com/What-We-Do/Training-Education/Harold-F-Holtz-Municipal-Training-Institute.aspx
- ☐ Helpful Links
  - ▪ City Charter https://library.municode.com/ga/brookhaven/codes/code_of_ordinances
  - ▪ Code of Ordinances https://library.municode.com/ga/brookhaven/codes/code_of_ordinances
  - ▪ City Agendas & Minutes webpage http://brookhavencityga.iqm2.com/Citizens/Default.aspx
  - ▪ Utility Service Policies
  - ▪ New to GMA https://www.gacities.com/Resources/New-to-GMA.aspx
  - ▪ GMA Publications https://www.gacities.com/Resources/GMA-Handbooks- Publications/GMA-Publications.aspx
  - ▪ Handbook for Georgia Mayors & Councilmembers https://www.gacities.com/Resources/GMA-Handbooks-Publications/Handbook-for- Georgia-Mayors-and-Councilmembers.aspx
  - ▪ New to GMA? https://www.gacities.com/Resources/New-to-GMA.aspx
  - ▪ Brookhaven Connect
    When a resident contacts, you about an issue, it can typically be handled via Brookhaven Connect…without you playing the middleman. Link follows.

    https://www.brookhavenga.gov/community/page/brookhaven-connect-service-request

    Council Members typically direct the caller to make a request on Brookhaven Connect and then say, "Contact me in a week if the issue is not resolved."

    Of course, you are free to engage each constituent request in a manner you deem appropriate; however, Brookhaven Connect is the system to ensure requests get to the correct department quickly, work orders developed, communications with residents documented, etc.

    Brookhaven Connect metrics are included in the monthly report.

    https://www.brookhavenga.gov/citymanager/page/monthly-departmental-reports
  - ▪ Social Justice, Race, & Equity Commission recommendations
    https://www.brookhavenga.gov/sjrec

Information Technology

- ☐ New hire checklist
- ☐ Email address & phone number
- ☐ International Travel Access
- ☐ Two-factor identification
- ☐ Printer access
- ☐ Badge PIN

City Administration

- ☐ Onboarding meeting

Human Resources

- ☐ New Hire Paperwork
- ☐ Payroll & Benefits (if applicable)
- ☐ ID Badge
- ☐ Risk Management – Insurance Agreement

Parliamentary Procedures (City Attorney & City Clerk)

- ☐ Council meeting protocols (seating, use of technology at meetings, meeting etiquette, Robert's Rules of Order)
- ☐ Council members' roles regarding council subcommittees and service on regional boards and committees
- ☐ Oath of Office information
- ☐ Campaign contribution reports
- ☐ Training regarding open meetings, ethics, city records (using city email address rather than personal for city business)

Site Visit

- ☐ Schedule a site visit for new officials to meet with each department head, tour their facilities and explain department functions to gain a better understanding of the city's operations