



## **GSO Officer Transition Resource Guide**

### **Office of Graduate Student Life**

To best preserve institutional GSO knowledge and support future officers and growth of the GSO, it is critical to ensure a successful transition between outgoing and incoming officers. The transition process between outgoing and incoming officers might be different for academic and affinity based GSOs. Transitions begin post elections in March to allow enough time for outgoing e-board officers to train incoming officers. If elections are held in September, please consider that a transition might still need to occur in spring if students are graduating. Below is a guide to support an effective transition.

#### **Transition Checklist**

- Prepare for elections of new officers including timeline and voting process. Elections should be held every year, as positions are filled for one academic year per election cycle.
  - Reminder: the GSA requires each GSO to have at least a president and treasurer, the remaining officer positions listed here are suggestions.
  
- Prepare in the month proceeding of what you would like to include for the transition of officers for your GSO. Suggestions include:
  - Review and/or prepare list of roles and responsibilities for officers (**see Addendum A for examples**)
  - Each officer prepares a summary of what worked, what didn't, successes, challenges and recommendations that will be shared with incoming officers.
  - Outline your expectations for individual 1:1 officers and E-board transition group meetings.
  
- Review and/or prepare a GSO Organizational Calendar (**see Addendum B for an example/template**)
  
- Prepare a timeline for transition and discuss and complete with e-board.

- Suggested recommendations for transition meetings --- It is recommended to hold a full transition meeting of all outgoing and incoming officers together to do some brainstorming and goal setting for next year's GSO in addition to a 1:1 transition meeting between outgoing and incoming officers. This is an opportunity to review the past year's accomplishments, challenges, tips, insight, and other information you feel would best support the student officers. *Note: you can use the GSA 2025 EOY Event and Expenditure Reporting Forms that are required by the GSA to be submitted in December and May.*
  
- Prepare a list of resources, conversations, suggestions, etc. that you feel are critical for the transition. Suggested areas to include:
  - Logins, Passwords and GSO documents and resources
    - GSO google drives
    - Organizational email account username and password
    - Social Media accounts
    - EMS Account Username and password (for student centers reservations)
    - Microsoft Teams channel GSA Public for President and Treasurer
    - Google Drive username and password
  
  - Important Contacts/Partners Contact Information, Role they serve and how they support your GSO
    - Advisor Name and Email
    - GSA President, Executive Committee and GSA Business Manager
    - Office of Graduate Student Life Advisors; Dean Ghada Endick and Kelly Martini

## **ADDENDUM A --- GSO Officer Roles and Responsibilities**

*\*Below descriptions are suggestions for the responsibilities of each role*

### **Defining the role of the President:**

- Preside over all official meetings and events of the organization.
- Call special meetings when requested under Article III, Section C.
- Approve all external communications, materials, advertisements, and collaborations engendered by the group.
- Serve as the primary liaison to the Office of Graduate Student Life and university administrators.
- Ensure the organization follows university policies and risk management guidelines.
- Develop GSO process for creating goals and priorities for the year.
- Facilitate officer transition and onboarding at the end of each academic year.
- Ensure representation of the GSO at GSA Plenary Council meetings.
- Conduct regular check-ins with executive board members to show care, offer support, and answer questions
- Lead member recruitment and retention initiatives.

### **Defining the role of the Vice-President:**

- Be an aide to the President, and, in case of the absence or disability of the President, pro tempore assume the control of the organization, and perform the duties of the President.
- Aid in the correction and approve all external communications, materials, advertisements, and collaborations engendered by the group.
- Perform other such duties as customarily pertain to the office of Vice-President.
- Oversee internal operations and committee coordination.
- Support conflict resolution among members, in coordination with the President.
- Track progress on annual goals and report updates at meetings.
- Coordinate officer elections and ensure adherence to the constitution/bylaws.
- Support member recruitment and retention initiatives.

### **Defining the position of Secretary:**

- Be present for all meetings.
- Keep the record of the proceedings of all meetings.
- Conduct the correspondence of the organization.
- Create marketing materials
- Maintain and update the organization's constitution, bylaws, and official documents.
- Track attendance and keep membership rosters.
- Archive meeting minutes and organizational records for continuity.

- Manage shared digital storage systems (e.g., Google Drive).
- Distribute meeting agendas and minutes within a designated time.
- Maintain event documentation for annual reporting purposes.
- Support member recruitment and retention initiatives.

#### **Defining the role of the Treasurer:**

- Maintain the financial records of the organization.
- Handle receiving all revenue of the organization.
- Pay all authorized bills for the organization.
- Render an account at each meeting, or more often if needed, of all receipts and expenditures.
- Submit, at the last regular meeting of the Spring term, a written, detailed annual report of the income and expenditures of the organization.
- Oversee fundraising efforts of the organization.
- Develop and present a proposed annual budget at the beginning of each academic year.
- Ensure compliance with university financial policies and funding guidelines.
- Submit funding requests and reimbursement paperwork on time.
- Provide financial transparency by sharing periodic budget summaries with members.
- Coordinate with President to ensure events stay within budget.
- Maintain documentation for audits or funding reviews.
- Train incoming Treasurer during transition.
- Support member recruitment and retention initiatives.

#### **Defining the role of each Social Chair:**

- Schedule and organize all social activities for the community.
- Set up at least one social per semester.
- Have dates of each social presented to the organization a minimum of two weeks before the Event.
- Collaborate with other campus organizations for possible co-sponsored social events.
- Work with Treasurer to develop event budgets and funding requests.
- Support member recruitment and retention initiatives.

#### **Defining the role of the social media & Communications Manager**

- Create content for and manage social media profiles.
- Curate a monthly newsletter that highlights events and issues relevant to the community, if applicable.
- Cross checking the facts, spellings, grammar, writing style, design pages, photos etc.
- Encourage members to provide content.
- Ensure accessibility standards (alt text, inclusive language, captioning when possible).
- Maintain archive of promotional materials and newsletters.
- Support member recruitment and retention initiatives.

#### **Potential other officer roles**

##### **Professional Development Chair**

- Plan academic, career, and research-oriented programming.
- Collaborate with faculty and campus partners.
- Coordinate workshops, panels, and networking events.

##### **Equity & Inclusion Chair**

- Ensure programming is culturally responsive and inclusive.
- Partner with cultural centers and affinity groups.
- Conduct climate check-ins and recommend improvements.

#### **First-Year Representative**

- Represent the needs of new graduate students.
- Support onboarding and orientation initiatives.

### **ADDENDUM B--- GSO Operational Calendar Example**

*\*Below is a suggestion for each GSO's operating timeline*

- **August**
  - **Submit space reservation requests for the school year (Pres/VP)**
    - Get a jumpstart on scheduling space (Graduate Student Lounge, PRCC, etc.).
    - It's **strongly recommended** that you go ahead and put in all reservations now. If you decide to host a meeting or happy hour elsewhere, that's fine. It's easier to make a reservation than get one at the last minute.
  - **Draft a meeting schedule for the Fall Semester (Pres/VP)**
    - This includes scheduling a regular, bi-weekly Executive Meeting
  - **Gain ownership of the GetInvolved Page**
    - GetInvolved is the website that Rutgers uses to manage student organizations. Using GetInvolved is also important because it's where you will find links to the monthly GSA Council Meetings that you must attend.
    - See the outgoing President for help with this. Rutgers' can help you gaining access if for some reason you have difficulty reaching the outgoing President
  - **Draft a rough budget for the upcoming school year (Treasurer)**
    - The GSA does not open the application for GSO's to get recognition and funding until after the school year has begun. Only at that time will you know what the max amount of money is your GSO can request from the GSA. However, you can get a jumpstart on planning if you operate from the assumption that you will **at the very least** receive the previous year's allocation.
    - The GSA typically asks that you submit a list of tentative events for the school year as the justification for your budget request in [this format](#). Always request the max allocation.
    - The application deadline will vary by year.
    - *To host an event before the recognition and funding period is complete, you will have to get special permission from the GSA Executive Council in writing (email: ec@gsa.rutgers.edu)*
- **September**
  - Send out Welcome E-mail/ message to your GSO members
    - Notify students about the date/time of the first event or meeting
  - Complete Org Registration with the Graduate Student Association

- Forms are available through their website
  - Begin planning for first event in October
    - Select theme (if applicable), caterer, and designate roles and responsibilities
  - You may be invited to table at New Student Org Fairs
  - Have president and treasurer attend the GSA's financial training so that your org can be allowed to submit a Funding Application.
    - Dates are usually dispersed via the GSA listserv – [Subscribe Here](#)
- **October**
  - Host first event of the year (varies depending on the recognition timeline)
    - Remember the minimum number of events you should have per semester to remain an active graduate student organization
    - Remember to submit a Post-Event Report ASAP (form found on Teams)
  - Have a representative of the E-board attend the first GSA Council Meeting
  - Begin planning for November event(s)
- **November**
  - Host November event(s)
  - Attending GSA Council Meeting
  - Begin planning for December event(s)
  - Begin discussing your goals and expectations for the Spring Semester
- **December**
  - Host December events
  - Attending GSA Council Meeting
  - Complete mid-year financial reporting to the GSA
- **January**
  - Send a welcome message to members
  - Attending GSA Council Meeting
  - Host events
- **February**
  - Host events
  - Attending GSA Council
- **March**
  - Host March events
  - Begin thinking about elections
    - Draft an election timeline
    - Update role and responsibilities descriptions as you see fit
    - Send out nomination form for the e-board positions
  - Begin planning April General Body Meeting
  - Attending GSA Council
- **April**
  - Host April event
  - Conduct voting process for the new e-board
  - Announce New E-Board for the upcoming year
  - Attending GSA Council
- **May**
  - Begin transition process with New E-board
  - Complete end-of-year financial reporting

