

# SO, YOU'RE THE CLERK...?



**A FIELD GUIDE FOR PCA CHURCH CLERKS**



**ORDERLY  
MEETINGS**

So, You're the Clerk ... Now What?



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## Prelude

So, you've been made the Clerk of Session or Presbytery. It seemed pretty straightforward, right? Show up, take the minutes, send them out. You may have figured you'd be at the meeting anyway, so you may as well take the notes.

This book is the result of discovery. When the author became Clerk, he inherited a file of previous minutes and a template for the minutes. At the time, he wasn't aware of the rest of the job. Just a few weeks after assuming the role, the Presbytery Review of Records Committee asked for the previous year's minutes. Wait ... there's a test?

Turns out, Session Clerks have been sending their minutes to Presbyteries since the early 1700s in a process called "Review and Control"!

And then there were the bylaws. And the "trustees of the corporation." And more!

Then one day, after shuffling spreadsheets and copying Word docs and reviewing all the checklists, an idea was hatched—there must be a better way.

This author researched software to manage agendas and minutes. There are many apps, but they are generally cost prohibitive, antiquated, and none of them supported the Review and Control process—one of the most time-consuming responsibilities of the Clerk and, by extension, the Review of Records Committees.

So, the idea for Orderly Meetings was formed. Shortly afterward, Elliott Wood and Phil Hunt started to map out the

requirements for a new software platform built specifically for the needs of church boards and denominational courts.

And this little book is the very one that Elliott wished he had when he started as Clerk.

This book is for new and old Clerks. We hope it will help you to be more **orderly** in your Clerk work.

And we pray that it helps you find more time to do the important work of relational ministry—and less time doing admin work.

This book is for you.

## Introduction

Today is an exciting and terrifying time. Artificial Intelligence capabilities are expanding every day. The efficiency and usefulness of AI tools are remarkable; and yet, there's much to be lost by leaning too much on AI and other technology to do our work.

But for the Clerk, AI can be an extremely useful reference tool. We've trained a custom ChatGPT "GPT" on Presbyterian documents including the *Book of Church Order*, Westminster Confession of Faith, various polity and position documents, the State of Tennessee laws regarding non-profits, and *Robert's Rules of Order*, Newly Revised.

Have you ever had a question in a Session or Presbytery meeting and needed to call for a break so the Clerk can look up the guidance on a question? Just the other night our Session needed to know how many commissioners we can send to General Assembly.

We could have stopped and looked it up—the resources are available. But, in a flash, we asked the ChatGPT "bot," and it responded, in seconds, with an answer and citation of the source of its information.

In writing this book, we've treated ChatGPT as a ghostwriter, giving it the important topics that we wanted to include in order to get a basic draft, using the training information and resources we've uploaded to it.

In the end, one of the things that AI is most useful for is synthesizing information, and we've leveraged it for that

purpose here. We encourage you to experiment with it as well.

We're also deeply committed to applying human wisdom in all of our endeavors—so you should know that we have "co-authored" this book with the aid of AI and incorporated our own experience, study, and discernment to its pages.

## Chapter 1: Biblical and Historical Roots of the Clerk's Role

### A Calling, Not Just a Job

When you agreed to serve as Clerk, you didn't just take on an administrative task—you stepped into a role that is both **pastoral and historical**. The *Book of Church Order (BCO 10-4)* makes it clear: the Clerk's job is more than just keeping records; it's about **preserving the peace and purity of the church** by ensuring that decisions are properly recorded and that the church operates according to biblical principles.

The Presbyterian Church in America (PCA) functions as a **grassroots, connectional church**. This means the governance of the church is not top-down but **built on the active participation of elders and clerks at every level**—Session, Presbytery, and General Assembly.

Clerks play a **critical role in self-governance**, ensuring that decisions are documented faithfully and in good order.

### Biblical Precedents for the Clerk's Role

The role of a Clerk has deep biblical roots. Throughout Scripture, we see how God appointed **leaders, elders, and scribes** to help maintain order and keep a record of His people's history.

#### 1. Moses and the Elders (Numbers 11:16-17)

When Moses was overwhelmed with the responsibility

of leading Israel, God instructed him to **appoint seventy elders** to assist in governing the people. This established a **principle of shared leadership and accountability**, which is foundational to Presbyterian polity.

#### 2. The Appointment of Scribes (Ezra 7:6; Nehemiah 8:1-8)

In the time of Nehemiah, **Ezra the scribe** played a crucial role in preserving and reading the Law to God's people. Scribes were responsible for accurately recording and transmitting the history and instructions of the faith, much like a **Clerk records the official actions of the church today**.

These biblical examples show that **keeping accurate records, maintaining order, and ensuring faithful governance are not just practical necessities—they are part of God's design for His church**.

### The Historical Development of the Clerk's Role

The modern role of the Clerk is shaped by centuries of Presbyterian tradition. Some key historical developments include:

- **Reformation-Era Presbyterianism**  
During the Protestant Reformation, John Calvin and the early Presbyterians emphasized **ordered church governance** based on biblical principles. Clerks were seen as essential to documenting church actions, thereby protecting the church from disorder and false accusations.
- **American Presbyterianism**  
In the early years of American Presbyterianism, churches developed **governing documents and**

**structured courts** (Session, Presbytery, Synod, General Assembly), requiring **Clerks to ensure continuity and consistency in church records.**

The role has evolved, but its core **remains the same: to serve the church by preserving its history and ensuring decisions are made in a way that reflects biblical order and integrity.**

### **State Requirements**

While the Clerk’s primary responsibility is to uphold **ecclesiastical** governance, there are also **legal requirements** that must be followed. In many states, churches must maintain corporate records, minutes of official meetings, and legal filings to comply with **nonprofit regulations.**

In many churches, the **bylaws** automatically assign the role of Secretary of the Corporation to the Clerk. If this is true in your church, you may have some responsibilities not specifically outlined in the Book of Church Order.

Some of these responsibilities may include:

- Filing **annual reports** with the Secretary of State (if the church is incorporated).
- Maintaining **corporate bylaws** and records of official church meetings.
- Keeping track of **tax-exempt status and compliance documents.**

Understanding these **legal** responsibilities help the church operate smoothly, both **spiritually and legally.**

## **Final Thoughts: A Sacred Responsibility**

The role of Clerk may seem like a **behind-the-scenes job**, but it is a **sacred trust.** You are preserving **the faithfulness and order of the church**, ensuring that **future generations can look back and see God’s work** through the decisions and history of His people. Whether recording minutes, maintaining membership rolls, or preparing reports for review, your work **honors God** by keeping His church “**decently and in order**” (1 Corinthians 14:40).

## Chapter 2: Essential Duties of the Clerk

The role of the Clerk is not just about taking notes—it's about **keeping an accurate and orderly record of church decisions.**

These records become the **official history of the church**, ensuring transparency, accountability, and faithfulness to Presbyterian polity.

This chapter outlines **best practices for recording minutes, preserving records, and fulfilling submission requirements.**

### Minutes Capture Decisions, Not Conversations

One of the most important things to remember about minutes is that **they are NOT a transcript.** According to *Robert's Rules of Order (RONR 48:2-4)*, minutes should record **what was done, not what was said.** A well-kept set of minutes will provide a **clear, concise, and accurate account of the meeting's actions** without unnecessary details.

### What Should Be Included in Minutes?

Every set of minutes should contain the following key elements:

#### ✓ Meeting Type

- Was this a **stated, called, or adjourned** meeting?
- If it was a **called meeting**, state the purpose.

#### ✓ Date, Time, and Place

- Include the **exact date and location** of the meeting.
- Note the **start and adjournment times.**

#### ✓ Names of Moderator and Clerk

- The Moderator (usually the Pastor) leads the meeting.
- The Clerk records the minutes.

#### ✓ Quorum Declaration

- A **quorum** must be present for official business (BCO 12-1 for Sessions, 13-4 for Presbyteries).
- If a quorum is not met, **record the meeting as "informational only"** with no official actions taken.

#### ✓ Motions and Their Disposition

- **Every motion must be recorded verbatim** and should indicate whether it was:
  - **Passed** (Approved)
  - **Failed** (Lost)
  - **Postponed**
  - **Referred to a committee**
- **Example of a properly recorded motion:**  
*"Mr. Smith moved that the church purchase a new projector for \$3,000. Motion was seconded and passed unanimously."*
- **Note:** While *Robert's Rules* requires that lost motions be recorded, the PCA Clerk's handbook indicates that churches may decide not to record failed motions. However, it may be useful to record both passed and

lost motions, especially if the same issues tend to re-surface.

- **Note:** While *Robert's Rules* suggests that people making and seconding a motion be named in the minutes, PCA customs allow simply recording that the motion was made, seconded, and approved.

#### ✓ Closing Prayer and Adjournment

- Every meeting should be **opened and closed with prayer**, and the time of adjournment noted.

### Best Practices for Taking and Formatting Minutes

- **Use a consistent format** for every meeting (consider a template).
- **Write in third-person objective style** (eg, "The Session approved ..." instead of "We decided ...").
- **Do not record personal opinions, arguments, or detailed discussions.**
- **If a motion is withdrawn**, note it in the minutes, but do not include the discussion leading to withdrawal.
- **If an amendment is made to a motion**, record both the original and the final motion.

#### Example of an Amended Motion:

##### 1. Original Motion:

*"Mr. Jones moved that the church allocate \$5,000 for new hymnals."*

##### 2. Amendment:

*"Mr. Brown moved to amend the motion to change the amount to \$3,500."*

##### 3. Final Motion (after amendment is approved):

*"The church allocated \$3,500 for new hymnals. Motion passed."*

## Digital vs. Printed Records – What's Required?

Proper preservation of church records is crucial for **historical, legal, and ecclesiastical accountability**.

✦ **The PCA encourages digital submission** for historical preservation, but official records must still be **printed, properly bound, and paginated**.

✦ **Printed minutes should be kept in a durable binder** for easy review. It is recommended not to use 3-ring binders because pages can be easily lost.

✦ **Backup records digitally** to prevent loss due to damage or theft.

✦ **Digital files should be stored in the church's system of record**, not in the Clerk's personal systems. Work with your church or presbytery's IT team to create a place for Session records. (Or – shameless self-promotion – set up an Orderly Meetings account for your church.)

### Why Does This Matter?

- Historical records allow **future generations** to learn from the church's decisions.
- Accurate records **protect the church in legal matters**.
- Well-maintained minutes **make Presbytery and General Assembly reviews smoother**.

### Define Your Process

- **Administrative Staff Responsibilities**—If you are fortunate enough to have administrative staff that can handle tasks like printing and binding the physical records, work with them to define clear handoff.
- Remember that proper record keeping is your responsibility as clerk; so if you have delegated certain steps, you should have a process to confirm that they are done properly.

## Annual Submission Deadlines

To maintain accountability, church courts **review minutes annually**:

### **Session Minutes → Reviewed by Presbytery** (BCO 12-7)

- Check with your Presbytery for due dates. Typically, Review of Session Records committees will request submission of Session Minutes in the spring following the calendar year to be reviewed.

### **Presbytery Minutes → Reviewed by General Assembly**

(BCO 14-6)

- See the PCA Administrative Committee Website “Presbytery Page” for more information.  
<https://www.pcaac.org/resources/presbyteries/presbytery-clerks-download-page/>

### What Happens During a Review?

- Your **Presbytery's Review of Session Records (RSR) Committee** examines Session minutes to ensure they comply with PCA guidelines. Most presbytery RSR committees have a checklist of approximately 30 questions!
- **The RSR Committee** submits its findings to the Presbytery for approval, often in an autumn meeting of the Presbytery.
- Once approved, **the RSR Committee returns its findings to Session Clerks with recommended corrections**. Most corrections may be made via a motion to correct in the next meeting of the respective Session. If the Session disagrees with the exception findings, they may respond with respectful disagreements, which may be met with further action of the Presbytery.

## Final Thoughts: The Clerk as a Steward of Church Records

Being a Clerk is **more than just writing down what happens**—it's about ensuring **accuracy, order, and faithfulness** in how the church operates.

By keeping clear and organized records, you help maintain the **integrity of church governance** and create a reliable historical record for years to come.

## Practical Takeaways

- ✓ Minutes should be clear and factual—no unnecessary details.
- ✓ Record motions verbatim and track whether they pass, fail, or change.
- ✓ Store records properly, both digitally and in printed form.
- ✓ Submit records annually for denominational review.

## Balancing RONR's Rigid Approach with Practical Context in Minutes

One of the biggest challenges for a Clerk is **finding the right balance** between **strict adherence to *Robert's Rules of Order Newly Revised* (RONR)**—which emphasizes recording **only motions and actions taken**—and **providing enough context** to make minutes useful to future readers.

***Robert's Rules* (RONR 48:2-4)** clearly states that minutes should capture **“what was done, not what was said.”** However, in a **Presbyterian church setting**, certain reports and discussions

provide necessary context for decision-making and may need to be documented.

The key is to **include enough detail to be helpful, but not so much that the minutes turn into a transcript.**

## When to Include Context in Minutes

- ✦ **Briefly Summarize Reports When They Affect Decisions**
  - If a report **directly influences a motion or action**, **summarize key points** so the rationale for the decision is clear.
  - Example: *"The Finance Committee reported that giving trends remain steady, with a slight increase over last quarter. Based on this, the Session approved a motion to increase the missions budget by 5%."*
  - ✗ **Avoid recording lengthy discussions or opinions**—keep it factual.
- ✦ **Reference a Report, But Don't Copy It**
  - If a full report is presented but no action is taken, **do not summarize the discussion**. Instead, simply **note that it was received**:  
*"The Diaconate Report was received as information."*
  - If necessary, **attach the full report** to the minutes (see next section).
- ✦ **When Financials are presented**
  - **Summarize only key data points** that impact decisions.

- The Clerk may ask the will of the Session regarding the level of detail to be recorded.
- Example: Instead of listing every detail of the treasurer's report, record:  
*"The Treasurer reported that the current balance is \$75,000. Offerings are 3% above projections. Report received."*

#### ✦ Membership Rolls Reports

- Record the actions of the Session, including the names, method of joining, or removal.
- Record that *BCO* steps were properly followed (*BCO* 12-8, 38-4).

#### ✦ Judicial or Disciplinary Reports

- Keep **only procedural details in the minutes**—never include **personal accusations, private discussions, or confidential information**.
- Example: *"Session entered executive session to discuss a matter of discipline (BCO 31-2). No action was taken."*
- If necessary, **retain full judicial reports separately in confidential files**.

#### ✦ Executive Session

- Record the motion to enter executive session, and that the session rose from executive session.
- Record the *actions* of the executive session.
- Do not record the discussions of the executive session.

#### ✦ Official Minutes vs Non-Official Notes

- Some Sessions may prefer to create a version of the Minutes that includes "non-official notes." The Orderly Meetings platform supports selecting which notes will be printed in different versions of the packet, allowing you to manage your official "binder" comments as well as "casual" non-RONR notes in a streamlined process.

When to Attach Reports, Presentation Slides, or Other Documents Including **attachments** can be helpful for historical reference, but **not everything belongs in the official minutes**.

#### ✓ Attach When:

- The document is **required for the record** (eg, annual budgets, membership rolls, official policies adopted by Session).
- The report includes **official statistics submitted to Presbytery or General Assembly**.
- The document contains **instructions or guidelines that need to be preserved** (eg, a new church policy).

#### ✗ Do NOT Attach When:

- The report was **only informational** and no action was taken.
- The document includes **sensitive financial or personal details** that could compromise confidentiality.
- Presentation slides were simply used as **a visual aid** without containing unique information. Instead, record:  
*"Elder Smith presented an overview of the youth ministry strategy (slides available upon request)."*

## Final Rule of Thumb

- ✦ If a future reader **needs the document to understand a decision**, attach it.
- ✦ If the report was just **discussed without action**, reference it **briefly and leave it out of the minutes**.
- ✦ **Confidential matters should never be recorded in detail**—use discretion to **protect sensitive discussions** while ensuring transparency in decision-making.

This approach helps the Clerk maintain **clear, concise, and legally sound records** while still preserving the necessary context for future leadership.

## Chapter 3: How to Stay Organized – Your Clerk’s Playbook

Serving as Clerk can feel overwhelming at times, but **staying organized and knowing what to prioritize** will make the job much more manageable. While some tasks are **solely the Clerk’s responsibility**, others can (and should) be **delegated to church staff or volunteers** when appropriate.

This chapter will help you set up a **system to track your duties, manage your workload efficiently, and collaborate with others**.

### The Clerk’s Yearly Checklist

A **structured approach** will help you keep everything in order. Use this checklist to make sure that **essential tasks are completed on time**.

#### Annual Tasks

These tasks typically occur **once a year** and involve **Presbytery, General Assembly, or legal requirements**.

- ✦ **Submit Session minutes for Presbytery review** (BCO 12-7)
  - **What you must do:**
    - Compile **final, approved minutes** from all Session meetings.

- Review for errors (missing quorum, unclear motions, procedural issues).
- Submit as required by Presbytery, either in **bound/paginated print format** or **digitally** (check your Presbytery's preference).

- **Delegation Tip:**

- If your church has **administrative staff**, they can help **format and organize** minutes for submission, but **you remain responsible for their accuracy**.

- ◆ **Complete PCA statistical reports** (membership, giving, etc.)

- **What you must do:**

- Collect required data:
  - **Membership totals (communicant, non-communicant, inactive members, deaths, transfers).**
  - **Professions of faith and baptisms.**
  - **Annual financial contributions and giving trends.**
- Submit the report before the **General Assembly's deadline**.

- **Delegation Tip:**

- **The Treasurer or administrative staff** often compile **financial statistics**.

- The **church secretary or membership coordinator** can help update **membership rolls** before reporting.

- ◆ **Verify corporate and legal filings with the state**

- **What you must do:**

- Ensure that the church files **any required annual corporate reports** (if incorporated).
- Maintain up-to-date **bylaws, insurance, and tax-exempt documentation**.

- **Delegation Tip:**

- The **church administrator or treasurer** may handle filings, but the Clerk should **verify** that they are completed on time.
- Work with the appropriate staff to make sure that you know all the deadlines.

## Monthly/Quarterly Tasks

Some responsibilities require **ongoing attention** throughout the year. **Scheduling regular check-ins** will prevent last-minute scrambling.

- ◆ **Maintain up-to-date membership rolls** (BCO 57-5)

- **What you must do:**

- Track **new members, transfers, baptisms, and removals**.

- Ensure that the Session **votes to approve membership changes** before they are recorded.
- Keep a **historical record of membership changes** for future reference.
- **Delegation Tip:**
  - If your church has a **secretary or membership coordinator**, they can assist in **updating and maintaining records**.
  - The Clerk is still responsible for **ensuring accuracy and submitting official reports**.
  - Work with the membership staff to **configure Church Management Software to use record types and statuses that make reporting easy and accurate**.

✦ **Prepare agendas (dockets) for stated Session meetings**

- **What you must do:**
  - Work with the **Moderator (usually the Pastor)** to create a structured **agenda (docket)**.
  - Include key items such as:
    - Opening prayer
    - Approval of previous minutes
    - Reports (finance, membership, committees)
    - Old business
    - New business

- Adjournment with prayer
- **Delegation Tip:**
  - A **church administrator or secretary** can help distribute the agenda, but **the Clerk should review to be sure that all required items are included**.

## Balancing Clerk Responsibilities with Staff Support

While the Clerk is responsible for maintaining **official church records and compliance**, some routine administrative tasks **can be shared with staff**.

Next is a look at **balancing responsibilities effectively**.

### What the Clerk Should Always Handle Personally

- ✓ **Approving and signing minutes**—You ensure accuracy and official status.
- ✓ **Ensuring proper parliamentary procedure is followed**—Your knowledge of *Robert's Rules* and the *BCO* makes you the authority.
- ✓ **Submitting official reports to Presbytery and General Assembly**—These are church-wide legal and ecclesiastical documents.

✔ **Overseeing judicial or disciplinary matters**– These require confidentiality and accuracy.

## What Can Be Delegated to Staff or Volunteers

✦ **Compiling financial data** → Treasurer or finance team

✦ **Formatting minutes and maintaining digital records** → Church secretary or administrator

✦ **Sending out dockets and meeting reminders** → Administrative assistant

✦ **Membership record updates** → Membership coordinator

## Best Practices for Delegation

1. **Communicate clearly**–Make sure staff understands **what is required and by when**. Create a simple list of tasks, listing who is responsible for each.
2. **Set up shared access**–Use **cloud storage or shared drives** for **agendas, minutes, dockets, and reports**.
  - **Orderly Meetings** (<https://www.orderlymeetings.com>) is purpose built for shared access to meeting records.
3. **Meet regularly with staff**–Have **brief check-ins** to ensure that delegated tasks are on track.

- **Send a post-meeting summary of any tasks assigned to staff**. For example, if the Session moves to send a communication to the members, then make sure the Communications Director receives the assignment!

4. **Maintain oversight**–Even when delegating, **review the final product before submission**.

## Pro Tips for Staying Organized

### ✔ Use a Clerk's Notebook or Digital Folder

- Keep a **binder or digital system** with:
  - Past minutes
  - Session decisions
  - Membership records
  - Legal documents

🔗 **Pro Tip!** Use **Orderly Meetings** to manage agendas and minutes. Coming soon in **Orderly Meetings: tools for tracking governing documents, task assignments, and the actions of the Session**.

### ✔ Set Calendar Reminders for Deadlines

- Use your **personal calendar** or the church's **administrative calendar** to track:

- Presbytery submission deadlines
- Annual reports
- Session meeting schedules

✓ **Create a Clerk’s Reference Sheet**

- Keep a **one-page summary of important contacts, deadlines, and procedures.**

✓ **Communicate with the Moderator and Session**

- The Clerk isn’t just a record-keeper—you **help the Session stay on track.** Keep leadership informed about **upcoming deadlines and required submissions.**

✓ **Track Motions and Follow-up Actions**

- Keep a running list of motions and any follow-up actions that are required and by whom. Remind the Moderator and other assignees of their pending actions.

## Final Thoughts: Work Smarter, Not Harder

The **best Clerks are not just efficient record-keepers, but wise stewards** of time and responsibilities. **Knowing what to prioritize, what to delegate, and how to stay organized will make your role much easier**—and help your church run more smoothly.

By following this **Clerk’s Playbook**, you’ll be prepared, efficient, and confident in your role. 🚀

## Extra: Using Church Management Software to Keep Accurate Membership Records

Church Management Software (ChMS) can be an **invaluable tool** for maintaining **accurate and up-to-date membership records**, reducing administrative workload, and ensuring **smooth reporting** for Session, Presbytery, and General Assembly.

✓ **Track Membership Changes in Real-Time**

- Record **new members, baptisms, transfers, and removals** with automated date stamps.
- Keep **historical records** of membership status changes for easy reference.

✓ **Generate Reports with Ease**

- Quickly pull **membership totals, baptism records, and profession of faith data** for PCA statistical reports.
- Customize reports to match **Presbytery requirements.**


✓ **Keep Contact Information Current**

- Maintain updated addresses, phone numbers, and email contacts for members.
- Use automated reminders to **prompt updates** from inactive members.

✓ **Ensure Security and Confidentiality**

- Most ChMS platforms offer **secure access controls**, ensuring that **sensitive information is protected.**

- Use **restricted access** for sensitive categories like disciplinary cases or pastoral notes.

 **Pro Tip:** Assign one or two key staff members to manage the ChMS while the Clerk ensures that official records match Session approvals.

Keeping membership records accurate and accessible makes your role easier—and helps the church serve its members more effectively!

### **Need help choosing or implementing Church Management Software that serves your church?**

Strategic Matter Consulting can help. See <https://www.chmsconsulting.com> for more information.


## Chapter 4: Running a Session Meeting—Decently and in Order


Session meetings are where **important church decisions are made**. A well-run meeting gives **order, efficiency, and fairness**, while following **both *Robert's Rules of Order (RONR)* and the *PCA's Book of Church Order (BCO)***.

The Clerk plays a **key role in keeping things running smoothly**, guaranteeing that all discussions and decisions are **recorded properly**.

### The Agenda


A **structured agenda** keeps the meeting on track and ensures that **important matters are addressed in an orderly fashion**.

Preparing the Agenda  **Work with the Moderator (usually the Pastor)** to prepare the agenda **before each meeting**.

 **Follow a standard order** to provide consistency and efficiency.

## A Basic Session Meeting Agenda:

- 1 **Call to Order and Prayer**—The Moderator opens the meeting and leads in prayer.
- 2 **Approval of Previous Minutes**—The Clerk presents minutes for approval or correction.
- 3 **Reports**—Updates from committees and commissions, such as finance, membership, and Presbytery representatives.
- 4 **Old Business**—Items carried over from previous meetings.
- 5 **New Business**—New motions, discussions, and decisions.
- 6 **Adjournment with Prayer**—Closing prayer and official meeting adjournment.

 Pro Tip: If a called meeting is held (BCO 12-5), the docket must stick strictly to the announced purpose.

## Handling Debate Properly

A Session meeting should be **orderly and productive**, while still allowing room for fair discussion.


The Clerk's role isn't to run the debate, but to **help the moderator ensure it follows proper rules and procedures**.

## How the Clerk Helps Keep Debate on Track:

- ✓ **Ensure speakers are recognized by the Moderator**
  - The Moderator **must recognize members before they speak** to maintain order.
  - If confusion arises, the Clerk can help the Moderator track **who is next to speak**.
- ✓ **Encourage Proper Use of Motions**
  - **Common motions in a Session meeting include:**
    - **Refer**—Assigns a topic to a committee for further study.
    - **Table**—Temporarily postpones a discussion.
    - **Amend**—Modifies a motion before voting.
    - **Postpone Indefinitely**—Ends discussion without voting on the motion itself.
- ✓ **Know When to Call the Question (End Debate)**
  - If discussion **becomes repetitive or unproductive**, a member may "**move the previous question**" (call the question).
  - **Calling the question requires a 2/3 majority vote** to end debate and move to a vote on the motion (RONR 16:6).

## Pro Tips for Running a Smooth Meeting

- ✓ Keep discussions focused—If a topic drifts off course, encourage proper motions to recenter the discussion.
- ✓ Use a docket with estimated times—If meetings frequently run long, setting time estimates for each section can help.
- ✓ Remind members of proper procedures—A quick reference guide for common motions can be useful.

A well-structured docket and properly managed debate will make Session meetings more efficient, fair, and productive—helping the church make decisions “decently and in order” (1 Corinthians 14:40). 

## Chapter 5: The Motion Machine—How to Make, Record, and Manage Motions

Motions are the **backbone of decision-making** in Session and Presbytery meetings. **Every official action must be made by motion, discussed, voted on, and recorded.**

Understanding the **proper process for making, handling, and recording motions** will help you keep meetings **efficient, fair, and well-documented.**

### Basics of a Motion

Motions must follow a **structured process** to provide clarity and objectivity. Here’s how a typical motion unfolds:

- 1 A member makes a motion:** *“I move that...”*
  - The motion must be **clear and actionable**.
  - Example: *“I move that the church purchase a new organ for \$5,000.”*
- 2 Another member seconds the motion:**
  - Prevents **frivolous debate**.
  - If there is **no second**, the motion **does not move forward**.
- 3 The Moderator restates the motion for clarity:**
  - Makes sure **everyone understands** what is being debated.

- Example: *“It has been moved and seconded that the church purchase a new organ for \$5,000. Is there any discussion?”*

#### 4 Debate occurs (if the motion is debatable):

- Some motions (eg, procedural motions) are **not debatable**.
- The Moderator **keeps debate focused** on the motion at hand.

#### 5 A vote is taken:

- The Moderator states the question and asks for votes.
- **Voting methods** include voice vote, show of hands, or ballot.

#### 6 The Clerk records the motion and outcome:

- The decision is **officially documented**.
- Example: *“Motion, seconded, and passed (or approved)”*
  - “M/S/P” and “M/S/A” are frequent abbreviations.

## Recording a Motion Correctly

The **Clerk’s record of motions should be precise and clear**. The minutes should **capture exactly what was decided**, while keeping unnecessary details out.

## How to Record a Motion Properly

### ✓ Write the motion verbatim:

- Example: *“Mr. Smith moved that the church purchase a new organ for \$5,000. Motion seconded and passed unanimously.”*
- Note, while RONR require recording the name of the motioner, it is customary to exclude the name of the motioner in PCA minutes. You can follow your Session’s rules.

### ✓ If a motion is amended, record both the original and final versions:

- Example:
  - Original Motion:** *“Mr. Smith moved that the church purchase a new organ for \$5,000.”*
  - Amended Motion:** *“Mr. Brown moved to amend the motion by changing the amount to \$4,500.”*
  - Final Motion:** *“Motion as amended: The church will purchase a new organ for \$4,500. Motion passed.”*

### ✓ Tabled motions must include a reason and timeline:

- Example: *“Motion to purchase a new organ was tabled due to budget concerns. The matter will be reconsidered at the next Session meeting.”*

### ✓ Defeated motions also should be recorded:

- Example: *“Motion to increase the youth ministry budget by 10% was lost.”*
- While RONR requires recording failed motions, it is customary in many PCA churches to exclude failed

motions. However, it is helpful to record failed motions, especially for issues that are repeatedly raised.

## Special Cases: Managing Complex Motions

### ✦ Motions to Refer to Committee

- Sometimes a motion needs **further study** before a decision is made.
- Example: *“Motion referred to the Finance Committee for further review. Committee to report back at next Session meeting.”*

### ✦ Motions Requiring a Higher Vote Threshold

- Some actions **require a 2/3 majority** (eg, ending debate, amending bylaws).
  - **Note:** Your Bylaws or state requirements may also require that the Bylaws be voted on by the Members of the Corporation (typically the Communing Members of the Church)
- If a **higher vote threshold applies**, then make sure to **record the vote count**.
- Example: *“Motion to amend the bylaws passed with a 2/3 majority (14 in favor, 3 opposed).”*

### ✦ Motions That Fail Due to Lack of a Second

- If no one seconds a motion, simply note: *“Motion failed due to lack of a second.”*

## Final Thoughts: Clarity is Key

A well-recorded motion makes sure that:

- ✓ **Decisions are clear and legally binding.**
- ✓ **Future Sessions can understand past actions.**
- ✓ **There will be no confusion over what was actually approved.**

By following these steps, you’ll **keep meetings running smoothly and records accurate**—ensuring that **the church remains faithful to its mission and governance.** 🚀

## Chapter 6: What Documents Are You Responsible For?

As Clerk, **one of your most important responsibilities** is keeping **accurate and well-organized records**. These documents serve **legal, ecclesiastical, and historical purposes**—ensuring that the church operates **decently and in order**, while preserving its history for future generations.

This chapter outlines the **three main categories of documents** you need to manage:

- ✦ **Corporate Documents** (legal and state compliance)
- ✦ **Church Governance Documents** (Session and Presbytery requirements)
- ✦ **Historical Records** (for PCA archives and future reference)

### Corporate Documents (Legal and Tax-Exempt Status)

- ✦ **Articles of Incorporation**
  - If your church is **incorporated**, then the Articles of Incorporation define the **legal existence** of the church.
  - These should be **filed with the state** and kept in the Clerk's official records.
  - Should **align with PCA polity and the church's bylaws**.

### ✦ **Bylaws**

- Church bylaws establish **the internal governance structure** and should be reviewed **every few years**.
- The bylaws must comply with:
  - **State laws** governing nonprofits.
  - **The PCA's Book of Church Order (BCO)**.
- **Changes to Bylaws** may require a vote by the Members of the church.

### ✦ **Tax-Exempt Filings**

- Most churches operate as **501(c)(3) tax-exempt organizations** under IRS rules.
- Be certain that the church maintains:
  - **Federal tax-exempt confirmation letter**.
  - **State sales tax exemptions (if applicable)**.
  - **Annual state filings to maintain nonprofit status**.

📌 Pro Tip: Work with the church treasurer or administrator to keep legal filings up to date and retain copies of all key documents in the Clerk's official files.

### ✦ **The Book of Church Order (BCO)**


- The *BCO* serves as the **constitutional standard** for all PCA churches.
- The Clerk should always have a **current edition on hand**.
- There's a handy digital version available at <https://www.pcaac.org/bco/>

### ✦ **Standing Rules**

- Each church or Session may adopt **Standing Rules** (local policies) to guide internal procedures.
- These **cannot conflict with the BCO** and should be **updated as needed**.

### ✦ **Membership Records (BCO 57-5)**

- Maintain **up-to-date rolls** of:
  - **Communicant Members** (adults & youth who profess faith).
  - **Non-Communicant Members** (baptized children not yet admitted to the Lord's Table).
  - **Inactive Members and Transfers** (records of those who have moved or joined another church).
- Membership records should be kept **both digitally and in print** for redundancy.

 Pro Tip: If the church uses Church Management Software (ChMS), the Clerk should

still ensure that records match Session approvals and remain accessible long-term.

## Historical Records (Preserving Church History)

### ✦ **Session and Congregational Meeting Minutes**

- The Clerk should **retain permanent records of all approved minutes**.
- Minutes should be:
  - **Bound and paginated** for archival storage.
  - **Submitted to Presbytery Review of Session Records committees annually** (BCO 12-7).


### ✦ **Significant Church Documents**

- Some documents should be sent to the **PCA Historical Center** for preservation, including:
  - **Charter documents** (first bylaws, founding minutes).
  - **Major church decisions** (property purchases, name changes, significant discipline cases).
  - **Records of pastors and officers**.

### ✦ **Presbytery and General Assembly Reports**

- Keep copies of **Presbytery minutes and communications**.


- Retain **copies of annual statistical reports** submitted to the PCA.

 Pro Tip: Designate a secure storage space (fireproof safe, digital archive) to protect these valuable records.

## Final Thoughts: A Clerk's Records Are the Church's Memory

A well-organized Clerk ensures that:

- ✓ The church **stays legally compliant**.
- ✓ The Session has **clear and accurate records** for decision-making.
- ✓ Future generations can **access the church's history**.

By managing these documents **wisely and diligently**, you'll help the church remain faithful, accountable, and prepared for the future. 

## Chapter 7: Understanding Committees and Commissions

Session, Presbytery, and General Assembly conduct much of their work through **committees and commissions**. While they may sound similar, they have **distinct roles and powers**.

A Clerk must **accurately record their actions**, ensuring that decisions are documented **according to PCA polity**.

### The Difference Between Committees and Commissions

The **key difference** between a committee and a commission is **authority**:

- ✓ **Committees report back to the body**
  - Committees are appointed to **study issues, investigate matters, or prepare recommendations**.
  - They **do not have authority** to make final decisions—**they must report back** for approval.
  - Example: A Session creates a **Building Committee** to research expansion plans and bring a **recommendation**.
- ✓ **Commissions act with delegated authority** (BCO 15-1)
  - A commission is **granted power to act on behalf of the appointing body**.
  - Its decisions are **final**, as if made by the Session or Presbytery itself.

- Example: A **Judicial Commission** is appointed by Presbytery to **try a disciplinary case** and make a binding ruling.

## Responsibilities of the Clerk Regarding Committees & Commissions

### ✦ For Committees:

- ✓ Keep records of **committee reports and recommendations**.
- ✓ Make sure that recommendations are **brought before the full body for action**.
- ✓ Record any **final decisions made by the Session** after reviewing a committee's report.

### ✦ For Commissions:

- ✓ Ensure that **minutes of commission meetings** are properly recorded.
- ✓ Note that a commission's **actions are final** (unless appealed).
- ✓ Record **who was appointed** and the **scope of their authority**.

## Practical Examples of Committees and Commissions in Action

### ✦ Session-Level Example:

- A **Finance Committee** reviews the church budget and **recommends** adjustments.

- The Session **votes on the recommendation** (since the committee has no authority to act alone).

### ✦ Presbytery-Level Example:

- A **Commission to Ordain a Minister** is given authority to **examine, ordain, and install a new pastor**.
- Its decision **does not need Presbytery approval**—the commission has **delegated authority**.

### ✦ General Assembly-Level Example:

- The **Standing Judicial Commission (SJC)** functions as a **commission**, making **final rulings** on judicial cases.

## Recording Committee and Commission Actions in Minutes

### ✦ For a Committee Report:

*"The Church Planting Committee reported on the new mission work in Smithville. After discussion, Session approved their recommendation to allocate \$10,000 to the project."*

### ✦ For a Commission's Final Action:

*"The Commission appointed to oversee the installation of Rev. John Doe met on April 10, 2024, and installed him as Pastor of Grace PCA. The commission adjourned with prayer, having completed its task."*

## Final Thoughts: Why This Matters for Clerks

- ✓ **Knowing the difference between committees and commissions** prevents errors in recording decisions.
- ✓ **Recording committee recommendations accurately** ensures that **Session or Presbytery acts properly**.
- ✓ **Tracking commission actions correctly** helps maintain the **church's legal and ecclesiastical records**.

By carefully managing **committee and commission records**, you help **be certain church governance remains faithful, accountable, and orderly**. 🚀

## Chapter 8: Handling Congregational Meetings and Elections

Congregational meetings are critical moments in the life of the church—whether for **electing officers, approving budgets, or making significant decisions**.

As Clerk, your role is to **record that the meeting follows proper procedure, votes are conducted legally, and records are kept accurately**.

This chapter covers **who can vote, how to run elections, and best practices for ensuring a fair and orderly process**.

### Who Can Vote?

Not everyone who attends a congregational meeting is **eligible to vote**. The PCA's ***Book of Church Order (BCO)*** provides clear rules on voting rights:

- ✓ **Only Communicant Members in Good Standing Can Vote** (BCO 24-3)
  - A **communicant member** is a **baptized and professing believer** who has been admitted to the **Lord's Table**.
  - They must be **in good standing**, meaning they **are not under church discipline**.
- ✗ **No Proxy or Absentee Voting Allowed** (BCO 24-3)
  - Members **must be present** to vote—there is **no mail-in, email, or proxy voting**.

- This ensures **biblical accountability and real-time decision-making** within the church body.

### ✗ Who Cannot Vote?

- **Non-communicant members** (eg, baptized children who have not yet made a profession of faith).
- **Visitors or non-members** (even if they are regular attenders).

## Running Congregational Meetings Smoothly

### ✦ Scheduling and Notifying the Congregation

- Meetings **must be properly called** according to the church bylaws and *BCO 25-2*.
- **Adequate notice** should be given—typically **at least one Lord’s Day in advance**.

### ✦ Quorum Requirements (BCO 25-3)

- **Check the bylaws** to determine how many members **must be present** for a valid vote.
- If a quorum is **not met**, the meeting **cannot proceed with business**.

### ✦ The Clerk’s Role During the Meeting

- ✓ **Record accurate attendance records** for voting eligibility.
- ✓ **Distribute ballots or voting materials** (if applicable).
- ✓ **Record motions, votes, and outcomes** in the official minutes.

📌 **Pro Tip:** Approve the minutes of the congregational meeting as the final order of business before closing the meeting in prayer and adjourning.

**NOTE:** In a congregational meeting, one of the first orders of business is to elect the Clerk of the meeting. While this is usually the Clerk of the Session, other Members may be nominated and elected to the role.

## Handling Elections for Elders and Deacons

### ✦ Election Process (BCO 24-1 to 24-7)

- **Nominations** are made in accordance with church policy.
- **Candidates must be examined by the Session** before being presented to the congregation.
- **Elections are conducted by ballot**, with a majority vote needed to be elected.

### ✦ Recording Election Results

- The Clerk **must document all elections in the minutes**, including:
  - **Who was nominated**
  - **How the vote was conducted**
  - **Who was elected or not elected**

- Example: “A ballot vote was conducted for the election of two new ruling elders. Mr. John Doe and Mr. Mark Smith were elected with a majority vote.”

## Final Thoughts: A Clerk’s Role in Congregational Meetings

- ✓ Ensure that **only eligible members vote**.
- ✓ Maintain **fair and orderly elections**.
- ✓ Keep **accurate records of all proceedings**.

By following these **BCO guidelines and best practices**, you will help **your church’s congregational meetings remain biblically faithful, orderly, and well-documented**. 🚀

## Chapter 9: What If Something Goes Wrong?

Even in the best-run churches, **conflicts, grievances, and judicial matters** may arise. When they do, the Clerk plays a **critical role** in ensuring that the process is **fair, orderly, and properly documented**.

This chapter provides guidance on **handling judicial complaints, maintaining accurate records, and following the PCA’s constitutional process**.

### What Constitutes a Judicial Complaint?

A **judicial complaint** occurs when a member or officer of the church is accused of a **chargeable offense**.

#### 🚩 Chargeable offenses include:

- Violations of **divine law or the PCA Constitution** (BCO 29-1).
- Doctrinal errors, moral failures, or misconduct that requires church discipline.

### The Clerk’s Role in Judicial Complaints

The Clerk is **not a judge** but is responsible for **ensuring procedural integrity and accurate records**.

### ✓ Facilitate a Fair Process

- The accused must receive **due notice of charges** and have the **opportunity to respond**.
- A trial or hearing should be **conducted decently and in order (BCO 31-2)**.

### ✓ Keep Accurate Records of All Proceedings (BCO 32-3)

- Document **all charges, evidence, testimony, and rulings**.
- Maintain **confidentiality** where necessary.
- If an appeal is made, **Session minutes must include all judicial actions** for Presbytery review.

## What Happens If a Session Member Is Accused?

✦ **If an elder or deacon is accused**, the Session **must follow judicial process** as outlined in the *BCO*.

✦ **If a pastor (Teaching Elder) is accused**, the Presbytery, not the local Session, handles the case (BCO 34-1).

### Steps in the Process:

- 1 Charges are Filed**—The complaint must be presented in writing.
- 2 Session Determines if the Charges Warrant a Trial** (BCO 31-7).
- 3 A Trial is Conducted (if necessary)**—Evidence is presented and a verdict is reached.

**4 The Decision is Recorded**—The Clerk records all decisions and actions in the Session minutes.

**5 Appeals May Be Made**—If a decision is appealed, it moves to **Presbytery** and potentially to **General Assembly's Standing Judicial Commission (SJC)**.

✍ Pro Tip: When handling judicial cases, double-check all records for accuracy—they may be reviewed at the Presbytery or General Assembly level.

## Handling Complaints Against Session Decisions

If a member **disagrees with a decision made by the Session**, they may file a **complaint** (BCO 43-1).

### ✦ The Clerk's Responsibilities:

- ✓ Ensure that the complaint is **submitted in writing**.
- ✓ Include the complaint in **Session minutes** and **notify Presbytery if it escalates**.
- ✓ **Track deadlines** for responding to complaints or appeals.

## Final Thoughts: Why This Matters for Clerks

- ✓ **Judicial complaints must follow due process**—ensuring fairness and accountability.
- ✓ **Accurate records protect the church** and help resolve disputes properly.

✓ **The Clerk plays a key role in maintaining order** and ensuring that justice is done in a **biblical, Presbyterian way**. By handling judicial complaints **wisely and according to the BCO**, you help maintain the **peace, purity, and unity of the church**. 🚀

## Chapter 10: How Orderly Meetings Can Simplify Your Role as Clerk

### The Challenge of Staying Organized

Being a Clerk is a **rewarding but demanding** role. Between:

- **Preparing for meetings**
- **Recording accurate minutes**
- **Tracking motions, votes, and membership changes**
- **Submitting records to Presbytery and General Assembly**

... it's easy to feel **overwhelmed**.

But **what if** there was a **tool** to help automate, organize, and simplify these tasks—allowing you to focus on the **spiritual shepherding of the church** rather than **administrative headaches**?

### What Orderly Meetings Does for You

#### ✦ **Simplify Minute-Taking**

- **Currently Available:** Stop scrambling to **format minutes manually**—The Orderly Meetings Agenda and Minutes Builder tools encourage standard formats.
- **Currently Available:** Motions, amendments, and votes are **captured** and stored securely.

### ✦ Organizes Meeting Agendas & Dockets

- **Currently Available:** Clerks and Moderators can **build and distribute agendas in advance.**
- **On the Roadmap:** Track **which items need discussion, referral, or decision** in real time.

### ✦ Tracks Motions & Voting Outcomes

- **On the Roadmap:** Never lose track of **who moved what, what was amended, and how it was voted on.**
- **On the Roadmap:** Built-in **vote tracking** for elections and major decisions.

### ✦ Ensures Compliance & Easy Record Submission

- **Currently Available:** Export **Presbytery-ready records** in just a few clicks.
- **Currently Available:** Secure **cloud storage** ensures that nothing is ever lost.

## Why Clerks & Sessions Love Orderly Meetings

- ✓ **Saves Hours of Administrative Work**—Spend less time formatting minutes and tracking motions.
- ✓ **Reduces Errors**—Keeps records consistent and compliant with BCO standards.
- ✓ **Secure & Accessible Anywhere**—No more lost paper records or outdated spreadsheets.

## Get Started with Orderly Meetings Today

The best way to see how **Orderly Meetings** can support your Clerk duties is to **try it for yourself.**

➔ Visit [OrderlyMeetings.com](https://OrderlyMeetings.com) to schedule a free demo or start your trial today.

# APPENDICES


- A. Sample Docket and Meeting Agenda for Session and Presbytery Meetings
- B. Checklist for Reviewing Session and Presbytery Records
- C. Common Parliamentary Motions and When to Use Them
- D. Glossary of PCA and *Robert's Rules* Terms


## Appendix A: Sample Docket and Meeting Agenda for Session and Presbytery Meetings


Having a **well-structured docket (agenda)** ensures that Session and Presbytery meetings remain **orderly, efficient, and productive**. Below are **sample dockets** for both **Session meetings** and **Presbytery meetings** to help guide Clerks in planning and recording official business.

### Sample Docket: Session Meeting

#### [Church Name] Presbyterian Church

 **Date:** [Insert Date]

 **Time:** [Insert Time]

 **Location:** [Insert Location]

#### 1. Call to Order and Prayer

- Moderator opens the meeting.
- Scripture reading or devotional (optional).

#### 2. Roll Call & Quorum Declaration

- Clerk records attendance of **Session members (elders)**.
- Declare **quorum present (BCO 12-1)**.

#### 3. Approval of Previous Minutes

- Review and approve **minutes from the last Session meeting**.

- Clerk makes any necessary **corrections or amendments**.

#### 4. Reports

**Pastor's Report**—Updates on ministry, pastoral care, upcoming initiatives.

**Clerk's Report**—Review of correspondence, membership changes, and statistical reports.

**Diaconate Report**—Financial updates, mercy ministry actions, facility needs.

#### Committee Reports:

- Finance Committee
- Missions Committee
- Christian Education
- Worship Committee

**Presbytery Updates**—Review of any communications from **Presbytery or General Assembly**.

#### 5. Old Business

- Follow-up on any **previously tabled discussions or unfinished business**.

#### 6. New Business

- Introduction of **new motions or topics for discussion**.
- Review of **upcoming events, church policies, or special projects**.

#### 7. Review of Action Items & Next Meeting Date


- Clerk summarizes **decisions made** and **tasks assigned**.
- Confirm **date and time of next Session meeting**.


#### 8. Adjournment with Prayer


- Closing prayer by Moderator or designated elder.

### Sample Docket: Presbytery Meeting

#### [Presbytery Name] Presbytery of the PCA

 **Date:** [Insert Date]

 **Time:** [Insert Time]

 **Location:** [Insert Church Name]

#### 1. Call to Order and Worship

- Opening **prayer and Scripture reading**.
- **Sermon or devotional** (if part of the agenda).

#### 2. Roll Call & Quorum Declaration

- Clerk **calls the roll** of Teaching Elders and Ruling Elders present.
- Quorum **confirmed according to BCO 13-4**.

#### 3. Approval of Previous Minutes

- Review and approve minutes from **the last Stated or Called Presbytery Meeting**.

#### 4. Reports from Committees & Ministries

**Stated Clerk's Report**—Correspondence, statistics, recommendations.

**Ministerial Committee**—Updates on pastoral calls, examinations, transfers.

**Review of Records Committee**—Approval of Session minutes from local churches.

**Missions & Church Planting Report**—Updates on church plants and missionaries.

**Christian Education Report**—Seminary student updates, ministry training.

**Diaconal Ministry Report**—Mercy ministries and financial assistance.

### 5. Examination of Candidates for Ministry

- Ordination and licensure exams (if applicable).
- Questioning and approval of pastoral candidates.

### 6. Judicial Cases & Complaints (If Necessary)

- Review of any **judicial matters, complaints, or disciplinary cases** (BCO 31-2).

### 7. Old Business

- Follow-up on **Presbytery-wide initiatives** or unfinished discussions.

### 8. New Business



- New motions, overtures to General Assembly, scheduling of next meeting.

### 9. Adjournment with Prayer

- Prayer for churches, ministers, and upcoming ministry work.

## Final Thoughts: Why a Structured Docket Matters

- ✓ Keeps meetings **focused and efficient**.
- ✓ Makes sure that **important matters are addressed in order**.
- ✓ Makes minute-taking **easier for the Clerk**.

 Pro Tip Use Orderly Meetings to create, distribute, and track your docket seamlessly—making meetings more organized and productive. 

## Appendix B: Checklist for Reviewing Session and Presbytery Records

A **well-kept set of records** ensures **accountability, transparency, and compliance with PCA polity**. Each year, **Session minutes are reviewed by Presbytery**, and **Presbytery minutes are reviewed by the General Assembly's Review of Presbytery Records (RPR) Committee**.

This checklist will help **Clerks prepare for these reviews**, ensuring **accurate and complete records** that avoid exceptions or corrective actions.

### 1. Checklist for Reviewing Session Records (BCO 12-7)

#### ✦ General Requirements

- ✓ **Minutes are properly formatted** (bound, paginated, and clearly structured).
- ✓ **Meetings are recorded chronologically** with clear headings.
- ✓ **Quorum is declared** for every meeting (BCO 12-1).

#### ✦ Content of Session Minutes

- ✓ **Approval of previous minutes** is recorded in each meeting.
- ✓ **All official actions are documented** (eg, motions passed, financial approvals).
- ✓ **Reports received** (Treasurer, Committees, Diaconate, Presbytery, etc.).
- ✓ **Membership changes recorded properly (BCO 12-8,57-5):**

- New members received.
- Baptisms recorded.
- Members transferred or removed.

#### ✦ Administrative & Legal Compliance

- ✓ **Annual Statistical Report submitted** to the PCA.
- ✓ **Session records reviewed and approved by Presbytery**.
- ✓ **Church bylaws and corporate filings** (if applicable) are up to date.

#### ✦ Judicial & Discipline Matters

- ✓ **Any church discipline cases are recorded in compliance with BCO 31-2 and 32-2**.
- ✓ **Confidential records are properly stored and not included in general minutes**.

### 2. Checklist for Reviewing Presbytery Records (BCO 14-6)

#### ✦ General Requirements

- ✓ **Minutes are complete, bound, and paginated**.
- ✓ **Quorum declared** for every meeting (BCO 13-4).
- ✓ **Meetings follow proper docket structure** (opening, reports, motions, etc.).

#### ✦ Content of Presbytery Minutes

- ✓ **Session minutes were reviewed, and exceptions noted**.
- ✓ **Ministerial calls, licensures, and ordinations recorded properly** (BCO 21-4).

- ✓ Judicial cases recorded with due process (BCO 31-2, 32-2).
- ✓ Actions regarding overtures or referrals to General Assembly.
- ✓ Financial reports presented and approved.

#### ✦ Annual Compliance & Reporting

- ✓ Annual report submitted to General Assembly.
- ✓ Presbytery's minutes reviewed by the General Assembly's RPR Committee.

## Final Thoughts: Stay Ahead of the Review Process

- ✓ Check your minutes quarterly rather than waiting for annual review.
- ✓ Use Orderly Meetings to automatically track motions, votes, and reports.
- ✓ Keep digital backups of all Session and Presbytery records for easy retrieval.

This checklist will help you **avoid common errors** and ensure that your records **pass review without exceptions.** 🚀

## Appendix C: Common Parliamentary Motions and When to Use Them

Presbyterian meetings operate under *Robert's Rules of Order (RONR)* to provide **decency and order** (1 Corinthians 14:40). Understanding **how and when to use parliamentary motions** allows Clerks and Moderators to **facilitate fair, efficient, and biblically ordered decision-making.**

This guide outlines **common parliamentary motions**, how to handle **multiple amendments and substitutions**, and best practices for Clerks to **accurately record proceedings.**

### 1. Main Motions (Used to Introduce Business)

A **Main Motion** brings **new business** before the body.

#### How to Make a Main Motion:

🗣️ "I move that we allocate \$10,000 to the missions fund."

#### ✦ Rules for Main Motions:

- ✓ Requires a second
- ✓ Is debatable
- ✓ Requires a majority vote to pass

### 2. Subsidiary Motions (Modify or Dispose of a Main Motion)

Subsidiary motions **alter, delay, or dispose of a Main Motion.**

Motion	Purpose	Debatable?	Vote Required
Amend	Modify the motion (change amount, wording)	✓ Yes	Majority
Refer to Committee	Send for further study	✓ Yes	Majority
Postpone to a Certain Time	Delay discussion to a later time	✓ Yes	Majority
Table (Lay on the Table)	Temporarily set aside	✗ No	Majority
Postpone Indefinitely	Kill the motion without voting on it	✓ Yes	Majority

✦ Example of an Amendment:

🗣️ "I move to amend the motion to allocate \$8,000 instead of \$10,000."

✦ Example of a Referral to Committee:

🗣️ "I move to refer this matter to the Finance Committee for further study."

### 3. Processing Multiple Amendments or Substitutions

When multiple amendments or a **substitute motion** are introduced, follow these rules:

✦ **First Amendment (Primary Amendment)**

- The **first amendment** is debated and voted on **before** voting on the original motion.
- **Example:** If the original motion is to **allocate \$10,000 to missions**, the first amendment might be to **change the amount to \$8,000**.

✦ **Second Amendment (Secondary Amendment)**

- A **secondary amendment** may be offered to **modify the first amendment** but **not the main motion directly**.
- **Example:** A secondary amendment may adjust the amount further **from \$8,000 to \$9,000**.

✦ **Handling Substitute Motions**

- A substitute motion **replaces the entire main motion with new wording**.
- The **substitute motion is voted on first**.
- If the substitute fails, debate continues on the **original motion or amendments**.
- **Example:** Instead of allocating \$10,000 to missions, the substitute motion may propose that the church **fund a different project instead**.

✦ **Recording Amendments and Substitutes in Minutes**

- Always **record the original motion** and all amendments.
- Clearly state whether amendments **passed or failed** before the final vote.
- **Example Minute Entry:**  
*"Mr. Smith moved that the church allocate \$10,000 to the missions fund. Mr. Jones moved to amend the*

amount to \$8,000, which was seconded and passed. The main motion as amended was then approved.”

## 4. Privileged Motions (Used for Urgent or Procedural Matters)

These motions **do not relate to the pending motion** but **address urgent concerns**.

Motion	Purpose	Interrupt Speaker?	Vote Required?
<b>Call for the Orders of the Day</b>	Enforce agenda schedule	✔ Yes	✘ No vote required
<b>Raise a Question of Privilege</b>	Address urgent personal or meeting issues	✔ Yes	✘ No vote required
<b>Recess</b>	Take a short break	✘ No	Majority
<b>Adjourn</b>	End the meeting	✘ No	Majority

✦ **Example of Raising a Question of Privilege:**

🗣️ “I rise to a question of privilege. The room is too hot—can we adjust the temperature?”

## 5. Incidental Motions (Used to Clarify Procedures)

These motions deal with **procedural questions**.

Motion	Purpose	Interrupt Speaker?	Debatable?
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<b>Point of Order</b>	Call out a rule violation	✔ Yes	✘ No
<b>Appeal the Decision of the Moderator</b>	Challenge a ruling	✔ Yes	✔ Yes
<b>Suspend the Rules</b>	Set aside a procedural rule temporarily	✘ No	✘ No

✦ **Example of a Point of Order:**

🗣️ “Point of order! That motion requires a two-thirds vote.”

## 6. Motions to End Debate and Vote

These motions **speed up decision-making**.

Motion	Purpose	Vote Required
<b>Call the Question (Previous Question)</b>	End debate and force a vote	<b>Two-thirds</b>
<b>Limit Debate</b>	Set time limits on discussion	<b>Two-thirds</b>

✦ **Example of Calling the Question:**

🗣️ “I move the previous question.” (If passed, debate stops, and a vote is taken.)


## 7. Summary: Clerk's Best Practices for Handling Motions

✦ **Ensure that the motion is stated clearly** before debate begins.

✦ **Track amendments and substitute motions carefully**—vote on them in the proper order.

✦ **Clarify vote requirements** (majority vs. two-thirds).

✦ **Record all decisions in minutes accurately.**

 **Pro Tip:** Use Orderly Meetings to track motions, amendments, and voting outcomes without confusion or lost details.

By following this guide, you'll ensure that **your Session and Presbytery meetings run efficiently, fairly, and in good order.**



## Appendix D: Glossary of PCA and *Robert's Rules* Terms

Understanding **Presbyterian polity** and **parliamentary procedure** is essential for Clerks. This glossary provides **quick definitions** of key terms from the **PCA's *Book of Church Order* (BCO)** and ***Robert's Rules of Order* (RONR)**.

### 1. PCA-Specific Terms

#### ***Book of Church Order* (BCO)**

The constitutional document of the PCA, outlining **church government, discipline, and worship**.

#### **Call (Pastoral Call)**

A formal invitation from a church to a pastor to serve as its minister, requiring **approval by Presbytery** (BCO 20-6).

#### **Clerk of Session**

An elected elder responsible for **recording and preserving** Session minutes and handling official correspondence (BCO 10-4).

#### **Commission**

A group with **delegated authority** to act on behalf of Session or Presbytery (BCO 15-1). **Their decisions are final** unless appealed.

#### **Committee**

A group that **studies an issue** and reports back with recommendations. **It does not have final decision-making power** (BCO 15-1).

## **Communicant Member**

A baptized member of the church who has made **a profession of faith and been admitted to the Lord's Table** (BCO 6-2).

## **Diaconate**

The body of **deacons** who oversee **mercy ministries, church finances, and physical needs** (BCO 9-1).

## **Judicial Case**

A church trial involving **charges against a member or officer** (BCO 29-1).

## **Moderator**

The **chairperson of a meeting**, usually the pastor for Session meetings and a ruling or teaching elder for Presbytery or General Assembly meetings (BCO 10-3).

## **Overture**

A formal **request from a lower court (Session, Presbytery) to a higher court (Presbytery, General Assembly)** to take action on a particular issue.

## **Presbytery**

The **regional governing body** of PCA churches, consisting of all teaching elders and ruling elder representatives from local churches (BCO 13-1).

## **Quorum**

The minimum number of members required to **legally conduct business** (BCO 12-1 for Sessions, 13-4 for Presbyteries).

## **Ruling Elder**

An elder elected by the congregation to **shepherd and govern the church alongside the pastor** (BCO 8-8).

## **Session**

The **governing body of a local PCA church**, made up of the pastor(s) and ruling elders (BCO 12-1).

## **Standing Judicial Commission (SJC)**

The body within the **General Assembly that hears judicial cases and appeals** on behalf of the denomination (BCO 15-4).

## **Teaching Elder**

An ordained pastor in the PCA (BCO 8-2).

## **Trustees**

Individuals appointed to handle **legal or financial matters** for a church or Presbytery (BCO 25-7).

## **2. Robert's Rules of Order (RONR) Terms**

### **Adjourn**

A motion to **end a meeting** (requires a majority vote).

### **Amend**

A motion to **modify the wording of a main motion** before a vote.

### **Call the Question (Previous Question)**

A motion to **end debate and move directly to a vote** (requires a two-thirds vote).

### **Chair**

The **Moderator or presiding officer** leading a meeting.

### **Division of the Assembly**

A request for a **formal counted vote** instead of a voice vote.

## **Floor**

The right to **speak during debate**.

## **Lay on the Table (Table a Motion)**

A motion to **set a motion aside temporarily** without debate.

## **Main Motion**

A formal proposal for the assembly to **take action on an issue**.

## **Minutes**

The **official record of meeting proceedings**.

## **Motion**

A formal proposal to **introduce, change, or dispose of business**.

## **Out of Order**

A statement indicating that a **speaker or action violates rules of procedure**.

## **Point of Order**

A call to **correct a procedural mistake**.

## **Refer to Committee**

A motion to **send an issue to a committee** for further study.

## **Second**

A statement that **another member agrees** a motion should be considered.

## **Substitute Motion**

A motion that **replaces the original motion entirely**.

## **Unanimous Consent**

An action **adopted without a formal vote** when no one objects.

# So, you're the clerk... now what?

We wrote this little book as a quick start guide for Clerks. Whether you just got the job or are on year two, or three, or ten, it's for you.

This isn't intended to be a treatise on *Robert's Rules* or the *Book of Church Order*, but we do intend it to be practical, accessible, and actionable.

The job of clerk goes well beyond taking the minutes, and this little book will get you started on the key responsibilities of the clerk's role in the Presbyterian Church in America.

We hope you find it helpful!

## Disclaimer:

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