

The Clerk and His Work

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Clerks do *clerical* work. What does that mean for clerks of ecclesiastical judicatories?

Introduction

A. History/Etymology

The word “clerk” was first in use before the twelfth century in the sense of “cleric,” “clergy.” It was used in the sense of “one employed to keep records” by the middle of the sixteenth century, as its use as a verb is found as early as 1551. Middle English “clerk” is from the Anglo-French “clerk” and Old English “cleric,” “clerc,” both of which are from the Late Latin “*clericus*,” from the Late Greek “*klērikos*, κληρικός” from the Greek “*klēros*, κλήρος” meaning “lot,” “inheritance” (an allusion to Deuteronomy 18:2), strictly “a stick of wood” (as used to cast lots); akin to Greek “*klan*, κλαν” “to break.”² Chaucer’s clerk (“The Clerk’s Tale” in *Canterbury Tales*) is a clergyman.

B. Remember:

The clerk is a servant. He serves the Lord, his judicatory, and the whole church. As such, he is clothed with limited, delegated authority.

I. The Clerk

So, who may be the clerk?

A. Who?

The Form of Government of the Orthodox Presbyterian Church (FG) says, “Every judicatory shall choose a clerk from among those who are or those eligible to be its members to serve for such a term as the judicatory may determine.”³ In any judicatory of the OPC, this necessarily means a minister or a ruling elder. Clerks of session are usually ruling elders, but ministers may certainly serve there, even if also moderating (as in the case of a small session). Ministers more commonly serve as stated clerks of presbytery, but ruling elders may also serve there. Both ministers and ruling elders have served as stated clerks of general assemblies.

¹ https://opc.org/os.html?article_id=1145, https://opc.org/os.html?article_id=1153. John W. Mallin, “The Clerk and His Work,” *Ordained Servant* 33 (2024): 78–90.

² “Clerk,” Merriam Webster, accessed December 22, 2023, <https://www.merriam-webster.com/dictionary/clerk>.

³ Stated Clerk of the General Assembly, The Form of Government, in *The Book of Church Order of the Orthodox Presbyterian Church* (FG, The Committee on Christian Education of the Orthodox Presbyterian Church, 2020), 19.

The question may arise, in light of the qualification, “those eligible to be its members,” whether an *inactive* ruling elder may serve as clerk. It appears from FG 25.2 that a ruling elder who is inactive (i.e., one not actively serving on a session) because he has not been reelected to a term of service “may be commissioned to higher judicatories by the session or presbytery,” and is thus eligible to serve as clerk of his session or presbytery or of a general assembly (GA).⁴ A retired minister or ruling elder might serve as clerk for the session which he had served, or its presbytery, or a GA.⁵ A ruling elder who has served another church in the North American Presbyterian and Reformed Council (NAPARC) may be used by the session on committees, but not as a commissioner to presbytery or general assembly nor as clerk of session because he is not eligible until the congregation calls him.⁶ It is not clear that a ruling elder who has transferred his membership from another congregation of the OPC where he served, but has never been elected to serve in his present congregation, is eligible to be a member of the session or may be commissioned to the presbytery and thus able to serve as clerk.

The clerk should be a competent writer; familiar with the resources listed below at III (Resources); a capable organizer of information, inclined to give attention to detail, and able to keep track of various documents, bits of information, and assorted tasks. Since at least the 1990s, he should be able to use digital technology. It should go without saying that he should be responsible, diligent, discreet, and trustworthy. And he should be able to give time to the tasks when the tasks demand it.

Clerks are officers of the judicatory they serve and are to be chosen by that judicatory, by election or, in small sessions, by unanimous (or general) consent.⁷

B. Assistants

It has become customary for stated clerks of general assemblies to ask a minister or ruling elder to serve as assistant to the stated clerk. Provision for this is made in the “Standing Rules of the General Assembly” (“Standing Rules”), where the duties of the assistant clerk are enumerated.⁸ He is to record the daily minutes of the assembly and prepare them for approval and otherwise assist the stated clerk as determined from time to time.

Some presbyteries have provided for the appointment or election of assistant stated clerks. Generally, where these are found, they assist the stated clerk of the presbytery in recording and, perhaps, preparation of minutes.

Although it is not customary for sessions to have an assistant clerk, there is no reason why they might not do so. Church secretaries may be employed by some sessions to

⁴ He would not, however, be entitled to vote or count in achieving a quorum.

⁵ See Stated Clerk, FG, 26.6–7.

⁶ NAPARC is an ecumenical organization of which the OPC is a member.

⁷ The term “common consent,” which is commonly used in the sense of “general consent” and “unanimous consent,” is not recognized in current editions of *Robert’s Rules of Order, Newly Revised (RONR)*.

⁸ Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church (SRGA), last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; see SRGA, 3.B.3–4.a, and 3.B.6 within the document.

assist in the formal preparation of minutes and, at the direction of the session, in other aspects of the clerk's work that do not require the presence of the secretary at session meetings. Such assistance should, of course, not involve the secretary in matters which call for involvement of ordained officers only.

II. The Work

The work of the clerk is the work of the judicatory he serves.⁹ The responsibilities of the clerk are listed in Robert's Rules of Order, Newly Revised (RONR), the Book of Church Order (BCO), the "Standing Rules" of the GA of the OPC, and generally in presbytery bylaws and congregational bylaws.¹⁰ Some of these responsibilities are highlighted below.

A. Records

The most obvious task of the clerk is the preparing, presenting, and keeping of records.

It should be remembered that all records kept by clerks are "public," at least in the sense that they may be seen by reviewers in broader judicatories, or by appellate judicatories, and may be requested as testimony or evidence by the civil magistrate (e.g., IRS, civil lawsuit, criminal trial). Additionally, they are historical records. For these reasons, care should be taken that records are orderly, accurate, in accordance with applicable standards, and intelligible to a reader from outside the judicatory or a reader distant in time. They should be complete for the purposes, but discrete, containing no extraneous matter. This last point is a matter for the discretion of the judicatory. It should be remembered that the records are not "the clerk's." They belong to the judicatory.

1. Minutes

The minutes of meetings are the most obvious records of those to be kept by the clerk. The bulk of these are generally the minutes of regular, "stated," meetings, but include all other meetings of the judicatory as well. Minutes should be kept in continuously paginated form, kept in permanent binders, signed by the clerk who took the record (i.e., by the clerk *pro tempore*, when the case requires) at the end of the minutes of each meeting.¹¹ The clerk must provide for the storage of approved minutes in a safe

⁹ The clerk's work is done by him on behalf of the judicatory. Someone must do the work that the clerk does because the judicatory is responsible for the work. Although the clerk does not do all the work of the presbytery, all his work is the presbytery's work. When he acts as clerk, he represents the presbytery. The requirement for a clerk and the qualification of a clerk set forth in FG 19 (see footnote 3), discussed above, are the consequence of this fact.

¹⁰ See the index under "secretary" in the current edition of *RONR*; Stated Clerk, FG, 19 and its index under "clerks," <https://www.opc.org/GA/StandingRules2021-2022.pdf>, particularly SRGA, 3.B.4–6, within the document.

¹¹ With the advent of technology that permits document sharing, it is possible for members of a judicatory, particularly a session, to compose and edit minutes during a meeting and approve them at the end of the same meeting. This is *not* recommended for at least two reasons: 1) it is the responsibility of the clerk to prepare the minutes in final form, not the responsibility of the other members of the judicatory; and 2) most, if not all, presbytery bylaws require minutes of session meetings (unlike those of congregational

place. Today, minutes are generally kept in electronic form as well; but, while this practice is a safeguard against catastrophic loss, it does not make it unnecessary for the official record to be kept in permanent binders.

Minutes should conform to a standard format. By-laws, “Instruments of the GA,” and “the Form of Government” will indicate items that are required to be included in the minutes of every meeting and particular items that must be recorded whenever they occur.¹² Beyond those matters required, nothing should be included in the minutes except by direction of the judicatory, which direction should be recorded in the minutes as an action taken by the judicatory. In addition to relevant portions of other governing documents, the current edition of RONR will dictate the language to be used in the minutes (see III.C, Resources: Robert’s Rules of Order, below).

a. Stated Meetings

Stated meetings are those regularly planned, generally by way of a pattern. A general assembly regularly meets once a year, the dates and place determined at the previous assembly. Presbyteries regularly meet two, three, or four times a year, usually depending on the geographical size of the regional church, smaller presbyteries generally meeting more often. Regular meetings of presbyteries are usually determined for a calendar year in the fall of the previous year. Examples of such patterns are the first Friday and Saturday of March and October; or the third Saturday of January, April, September, and November. Minutes of each regularly scheduled presbytery meeting should indicate that the meeting is “stated.” Sessions generally meet monthly or twice monthly and may be scheduled at each meeting. Minutes of congregational meetings (which must occur at least annually) should be kept with minutes of the session, inserted at the chronological point where they occur.¹³

b. Adjourned Meetings

An adjourned meeting is a continuation of another meeting, whether stated, adjourned, or special. It is continued to complete business that was docketed for the meeting from which this meeting is adjourned. It is scheduled at the meeting from which it was adjourned, the minutes of which meeting should indicate that the “meeting was adjourned to meet on [date] at [time] at [place].” The minutes of the subsequent adjourned meeting should indicate that the meeting is an “adjourned” meeting. This is significant because an adjourned meeting is treated as a continuation of the previous meeting, allowing some actions which are not permitted by RONR at successive meetings, such as a motion to reconsider an action previously taken.

meetings or meetings of General Assembly) to be approved at the *next* regular meeting. This allows for proper review by the judicatory. Generally, a draft of minutes should be sent to members of the judicatory before the meeting at which they are to be reviewed so that corrections may be made before the meeting at which they are presented for approval. See below at II.B.1 (“Reporting: To Your Judicatory”).

¹² Regarding recording dissents and protests and answers to protests in minutes, also note Stated Clerk of the General Assembly, BD 8, 118.

¹³ Stated Clerk, FG 16.1, 26.

c. Special Meetings

A special meeting is called specially; that is, neither a stated meeting nor an adjourned meeting. It may be called and scheduled by the judicatory at a regular or adjourned meeting, or it may be called by the moderator or stated clerk at the request of the number of ministers and ruling elders specified for the relevant judicatory in the “Form of Government” (generally, a quorum of the judicatory).¹⁴ Only business specified in the call to the meeting may be transacted. The minutes of the special meeting should indicate that the meeting is special, include the purpose(s) for which the meeting is called, and record that the call to the meeting is found to be in order by those in attendance.

d. Trials

Meetings of trials are separate and distinct from regular, adjourned, or special meetings, even if they occur within the timeframe of such a meeting. They have their own rules of proceeding and their own requirements for record-keeping. (The Book of Discipline should be consulted for these rules and requirements.)¹⁵ Minutes of meetings of trials should be kept in the book of minutes with the minutes of other meetings and may be incorporated into the minutes of another meeting if the trial occurs within the timeframe of such a meeting, as long as they are distinguishable as minutes of a meeting of trial.

e. Executive Sessions

Executive sessions held during a meeting are essentially a tool for discussion of sensitive matters in secret, excluding non-members (except upon invitation) from the discussion. Actions taken in executive session, which must be public in order to carry them out, including the determination to arise from executive session, should be reported out to open session, in the manner of committee recommendations, for action in open session. Accordingly, minutes taken in executive session, should be sealed and not included with regular minutes, except that the actions reported in open session and, at least the action to enter executive session and the fact of the exit from executive session (together with times of entrance and exit) should be recorded in the minutes of the meeting during which executive session was entered.¹⁶

f. Committee of the Whole

A judicatory may determine in the course of a meeting to go into committee of the whole or in quasi committee of the whole, which allows less formal discussion of a matter. Since, technically, the body in such a case is not the judicatory, but a committee

¹⁴ Stated Clerk, for session, see FG 13.5, 17; for presbytery, see FG 14.7, 21; for General Assembly, see FG 15.5, 24.

¹⁵ Stated Clerk, BD 4.A.2, 103.

¹⁶ See *RONR 12th Edition* (Hachette Book Group, 2020), §§9:24–9:27, 86–88; or *RONR 11th Edition* (Da Capo Press, 2011), §9, 95–96.

thereof, the committee of the whole or quasi committee may vote on recommendations, which recommendations will be “reported” to the judicatory for final decision and disposition. This will require the clerk to record the determination to go into a committee of the whole or in quasi committee (with the time of entrance), the fact of the rising and report of the committee (with the time of rising), and the text of any recommendation(s) brought by the committee, but otherwise no minutes of the committee should be recorded.¹⁷

2. Membership Rolls and Directories

The records of the judicatory for which the clerk is responsible include the roll(s) of members of the body over which the judicatory has original or immediate jurisdiction.¹⁸ Membership rolls, directories, and attendance rolls or records are not interchangeable terms, although the clerk will track, create, and keep all three. Each type of judicatory has its distinctive membership.

The membership of a general assembly necessarily changes from year to year as a GA is “dissolved” at the end of the assembly’s meetings and a new assembly is elected for the next year. The stated clerk of the GA will maintain the attendance at a given assembly, which will include all those commissioned by their presbyteries who actually attend, as well as the moderator and stated clerk of the previous assembly, the stated clerk of the current assembly, and fraternal delegates and representatives of the various committees who are in attendance and seated as corresponding members of that assembly. (The action to seat corresponding members at a meeting of any judicatory should be recorded in the minutes of the meeting.) The membership of the assembly is the ministers and elders commissioned by presbyteries and the assembly officers mentioned above. The membership of the assembly (with the presbytery represented by each commissioner) and the attendance at the assembly will be included in the minutes of the assembly. The stated clerk of the GA also publishes and distributes annually a directory, with contact information, of all the ministers and congregations presently in the OPC.

The stated clerk of a presbytery will, at a meeting of the presbytery, keep track of and record in minutes the attendance by ministers and ruling elders commissioned by their sessions, as well as any alternate ruling elder commissioners and fraternal delegates who may be in attendance and seated as corresponding members. All the ministers and all the ruling elders of the congregations of the regional church are members of the presbytery, without respect to attendance.¹⁹ The stated clerk will keep a record of the membership of the presbytery as well as any members at large of the regional church.²⁰ The stated clerk of the presbytery will also keep a separate list of licentiates and men under care of the

¹⁷ See *RONR: 12th Edition*, §52, 503–14; or Henry M. Robert III, et. al. eds., *RONR: 11th Edition*, §52, 529–42.

¹⁸ Stated Clerk, FG 13.8, 18; 14. 6, 21; 15.2–3, 23; SRGA (last modified 2021–2022), <https://www.opc.org/GA/StandingRules2021–2022.pdf>; see SRGA 3.B.4.b–c, 4–5 and B.5.n, 5 within that document.

¹⁹ Stated Clerk, FG 14.2, 20.

²⁰ Stated Clerk, FG 29.A.1, 81; and 4.a, 82.

presbytery, having recorded in the minutes their reception as men under care, licensure, ordination, and/or dismissal, as would be done with reception and/or dismissal of ministers from/to another presbytery or other denomination. Additionally, the stated clerk of the presbytery may maintain and publish a directory of the ministers and ruling elder members of the presbytery, men under care and licentiates, fraternal contacts, and members at large of the regional church.

The clerk of session may maintain and publish a directory of members of the congregation he serves, and possibly, with permission, regular attenders. He will record in the minutes attendance at session meetings and at meetings of the congregation. He will record in the minutes of session meetings the reception of members (both communicant and non-communicant), with their full names (including maiden names), dates of birth, and the date of actual reception of each. He will also record in minutes the removal from membership of any member together with the reason for removal and the effective date, as well as the movement of any member from the roll of non-communicants to the roll of communicant members together with the effective date of change (the date of public profession). These minutes may form the basis for the formation of the rolls of the congregation, which rolls include the record of past and present members, noting full names, dates of reception, dates of birth, dates of baptism, dates of censures, dates of restoration, dates of death, and dates of removal from membership in the congregation. Members of the congregation worshipping with a mission work shall be included and designated.²¹

3. Statistical Reports

The clerk of session is requested, and the stated clerk of a presbytery is required, to report annually to the general assembly certain statistical data and important changes that have taken place in the past year within the jurisdiction of the judicatory they serve.²² The information in minutes and rolls described above will be the source for reporting the non-statistical (and some of the statistical) information that is to be reported. The GA's statistician provides a form for reporting this information. Some presbytery bylaws require that a copy of each year's completed form is to be included in the session's minute book at the end of the minutes of the year; some other summary information may also be required by the presbytery for inclusion at the end of the minutes of the year.

²¹ Stated Clerk, FG 13.8, 18.

²² Stated clerk, FG 14.6, 21; SRGA, last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; see SRGA 3.C.1, 4 within that document.

4. Other Items

The clerk may be asked to record or keep track of (even temporarily) other matters, as directed by the moderator, the judicatory, or others.²³ Such other matters may or may not be recorded in minutes or otherwise kept permanently.

B. Reporting

It is important for everyone to remember that the records kept by the clerk do not belong to the clerk; rather, they belong to the judicatory that he serves. Therefore, it is necessary for the clerk to report regularly on all his work, particularly submitting the records he keeps to his judicatory whenever additions, corrections, or other changes are made to those records. This especially applies to minutes, the subject of the next comments.

1. To Your Judicatory

Minutes of meetings of sessions and presbyteries must be presented to the judicatory to whom they belong at the next regular meeting following the meeting that the minutes record. Minutes of congregational meetings must be read at the end of the meeting they record. Minutes of meetings of a general assembly are read at convenient points throughout the assembly and finally at the end of the assembly. In each case, this will involve the following three phases.

a. Review

The minutes are first presented in draft form for review by the judicatory (or congregation) so that corrections can be made. With the exception of minutes of congregational meetings, it is advisable for the clerk to distribute the draft minutes well in advance of the meeting at which they are to be formally reviewed, so that members of the judicatory can review them and suggest corrections to the clerk beforehand, so that the draft as presented at the meeting will be in the best condition for the next phase, thereby saving time at that meeting.

b. Approval

The second phase is *approval*. After the minutes have been reviewed by the judicatory (or congregation), the minutes will be approved “as presented” (that is, in the final draft form) or “as corrected” or “as amended” (at the meeting at which they are presented for approval). The minutes of the meeting must record the action to approve the minutes of the previous meeting (or of the congregational meeting or of the general assembly as a whole), *as presented* or *as corrected* or *as amended*.

²³ For example, see Henry M. Robert III, et al., eds., *RONR: 11th edition*, §61, paragraphs on “‘Naming’ an Offender,” 646, lines 20–25, and 647, lines 28–31; or in Henry M. Robert III, et al., eds., *RONR: 12th edition*, §61, paragraphs on “‘Naming’ an Offender,” 611, paragraph 61:12 and 612, paragraph 61:17.

c. Response by the Clerk

The third phase is the response to the second phase: that is, any follow-up necessary to ensure the record is in its best possible condition, clear and clean. The clerk will, of course, apply all the corrections made and approved by the judicatory (or congregation or assembly). Before printing the minutes, he should also check them for typos, spelling, punctuation errors, or other minor matters that may have been missed previously. He should not make any substantive changes in wording or content without the approval of the judicatory. He will format the minutes to be consistent with the format previously used, allowing adequate space in margins for binding and, in header or footer, for pagination.

After final formatting and proofreading, the minutes of a general assembly are ready to be sent to the printer and then for distribution; the minutes of a presbytery meeting are ready to be printed and inserted in the binder.²⁴ Session minutes are ready for the next phase, which may vary in its details, as discussed in the next paragraphs.

2. To the Next Higher Judicatory

While the clerk is responsible and accountable to his judicatory, the session and the presbytery are responsible and accountable to their next higher judicatory (the presbytery and the general assembly, respectively).²⁵ Accordingly, the clerk of session and the stated clerk of the presbytery must report to their next higher judicatory, presenting for review and approval the minutes which have been approved by their own judicatory. If the reviewing judicatory *takes exception* to any portion of the minutes presented for review, the presenting judicatory will be required to *respond* to each exception (see II.B.2.c, below, “Response by Your Judicatory”). Reporting to the next higher judicatory is required of presbyteries annually and of sessions at least annually.²⁶

a. Review

As noted above, the stated clerk of a presbytery, after applying the corrections made by the presbytery to the presbytery’s minutes, proofreading and making final corrections, formatting and properly paginating the minutes, will print the minutes that have been approved by the presbytery since the presentation of minutes to the most previous general assembly. The minutes should be printed on acid-free paper with pre-punched rectangular

²⁴ See Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; particularly see “Instruments of the General Assembly of the Orthodox Presbyterian Church,” A.1, 18 in that document, which requires that “the minutes of the presbytery shall be kept in lock-type record books with numbered pages.” These record books have become very expensive and of limited availability since many companies, law firms, and others who used them in the past have switched to all digital record-keeping. At the time of writing this note, Wilson-Jones appears to be the only remaining producer of such binders and the specialized paper used in them.

²⁵ This is the concept of review and control. See Stated Clerk, FG 12.2, 16: “The lower assemblies are subject to the review and control of higher assemblies, in regular graduation.”

²⁶ See Stated Clerk, FG 14.6, 21 and 13.8, 18 respectively. Note that sessions submit for review the minutes of the congregational meetings as well as the minutes of meetings of the session.

holes for the locking posts of the binder, sold with the binder or separately. The minutes of each meeting must be signed by the stated clerk (or clerk *pro-tempore*, for meetings where the stated clerk was absent).²⁷ After printing the minutes, together with the current bylaws of the presbytery and a copy of the current Rules for Keeping Presbytery Minutes, the pages must be inserted into the binder and carried to the general assembly and presented to the stated clerk of the general assembly for review.²⁸ Each general assembly erects a temporary committee to review presbytery records and make recommendations for approval.²⁹

The clerk of session, after applying the corrections made by the session to the session's minutes, proofreading and making final corrections, formatting and properly paginating the minutes, will have ready for printing a digital copy of the minutes that have been approved by the session since the last presentation of minutes by the session to the presbytery. However, depending upon the process of review used by the presbytery, he may or may not print the pages and insert them in the binder. Because the session minutes must finally be printed on the same expensive acid-free paper with pre-punched rectangular holes for the locking posts of the binder, which are sold with the binder, some presbyteries provide for review of digital copies of minutes, allowing preliminary comments by reviewers and corrections of typos and some errors that would be exceptions before final presentation of the minutes. Although this requires a few extra steps, it may save time ultimately and certainly can save expensive paper; and furthermore, it results in better, clearer, and cleaner minutes. Other presbyteries may review digital or hard copies before the meeting but not allow corrections before a final report of the reviewers. Some presbyteries may do the review at a meeting that takes place over more than one day. Review may be by a standing committee, by a session assigned by a committee to review the records of another session, or by other reviewers assigned by the committee. In any case, printing, signing, and inserting minutes in the

²⁷ Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; see “Instruments of the General Assembly of the Orthodox Presbyterian Church,” A.18, 19 in that document.

²⁸ Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, A.19–21, 19; on inclusion of bylaws and Rules for Keeping Presbytery Minutes, see Instrument A; particularly note Instrument A.20–21. On presentation of minutes to the stated clerk of the GA, see Instrument A.19. Rule 19 states that “the Stated Clerk [of the presbytery] shall be responsible for the presentation to the General Assembly for approval of all minutes of the presbytery which have been approved by the presbytery and not previously approved by the General Assembly.” This means that if the stated clerk of a presbytery is not a commissioner or otherwise present at the beginning of a general assembly, he must arrange for the delivery of the minutes of the presbytery to the stated clerk of the assembly by a commissioner or other person or other means on time. Presbytery bylaws may provide for similar responsibility of clerks of sessions vis-à-vis presentation of minutes for approval by the presbytery; if not, such responsibility of the clerk of session may be understood *inter alia* in light of Stated Clerk, FG 19.30.

²⁹ See Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; particularly see SRGA 10.1, 12, and 4.a.(1), 14 within that document and also Instruments of the General Assembly of the Orthodox Presbyterian Church, B.1, 19 within that document.

binder will be done before the final report to the presbytery by the committee or assigned reviewers.³⁰

b. Approval

The committee of the presbytery or of the general assembly that reviews the records of the session or of the presbytery, after the review is complete, will recommend to the presbytery or to the GA approval of the records that have been reviewed, either with or without exceptions and/or notations. In other words, records that have been reviewed will be approved by the reviewing judicatory. If there are no errors, the records are approved with no exceptions and no notations. If there are violations of the Bible, confessional standards, Book of Church Order (BCO), or Rules for Keeping Presbytery (or Sessional) Records, the records are approved with *exceptions*, which are numbered and listed in the minutes of the reviewing judicatory. If there are typos, spelling errors, grammatical errors, or the like, the records are approved with *notations*, which are numbered for the record and listed for the benefit of the judicatory whose minutes were reviewed, but the individual notations are not recorded in the minutes of either judicatory.³¹ In any case, the minutes for the calendar year 20__ (or from page __ to page __) will be approved.³² The moderator of the reviewing judicatory will sign the minute book at the end of the minutes which have been reviewed, indicating that they are “approved with (or “without”) ___ exceptions and/or ___ notations” along with the date of approval.

c. Response by Your Judicatory

If the records of the session or presbytery have been approved by the higher judicatory without exception (whether with or without notations), there is nothing further to be done by the clerk or the judicatory with respect to those minutes that have been reviewed.³³ If the records of a lower judicatory have been approved by the higher judicatory with exceptions, the clerk of the lower judicatory must record the exceptions in the minutes of the meeting of his judicatory following the meeting of the higher judicatory at which the exceptions were found and taken, as those exceptions will have been recorded in the minutes of the higher judicatory. The lower judicatory must then respond to each of the exceptions taken (which responses may be proposed by the clerk

³⁰ Clerks of session should consult the bylaws of their presbytery to learn the presbytery’s process of review of sessional records and what is thus required of the clerk of session and when it is to be done.

³¹ Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; see Instruments of the General Assembly of the Orthodox Presbyterian Church, A.22–23, 19.

³² So, minutes may be approved “without exception or notation;” or “without exception and with x notations;” or “with x (perhaps ‘no’) notations and the following x exceptions” (followed by a list of the exceptions, including in each case the rule or provision violated and the page and paragraph at which the exception occurs).

³³ Notations are minor matters which need not be corrected or addressed in any way (and generally, are not capable of correction without changing pages that have already been approved, which would corrupt their status as official, certifiable records. The clerk should, however, take note of the kinds of notations made in order to take care not to repeat those kinds of errors in future.

for consideration by his judicatory), and the clerk must record those responses in the minutes of the meeting at which the responses are adopted by the judicatory.³⁴

A response to a given exception may acknowledge the cited error or dispute it. If the exception is disputed, the response as recorded in the minutes will necessarily provide the reasons for reconsideration and removal of the exception. If the exception is acknowledged, the response as recorded in the minutes will state that acknowledgement and provide whatever information is necessary and possible to correct the error, e.g., supplying missing information, clarifying a passage that was unclear, correcting a citation or cross-reference, etc.³⁵ It is important to note that this information or other correction by way of response should not be inserted in the minutes where the missing information ought to have appeared originally; it should be recorded in the minutes that record the response adopted by the judicatory (minutes that have not yet been reviewed by higher judicatory). The responses to the previous year's exceptions will thus be submitted to the higher judicatory at a following meeting of the higher judicatory *and* in the minutes presented for review and will be explicitly deemed sufficient (or not) together with approval of the minutes of the period under current review.

C. Correspondence

In addition to bearing the responsibility to prepare and maintain records, the clerk is also responsible for correspondence. In judicatories where there are two clerks, their labor may be divided so that one is a recording clerk and the other a corresponding clerk.³⁶ The "Standing Rules" and the bylaws of some, if not all, presbyteries enumerate in some detail the duties of their respective clerks, many of which will involve various types of correspondence.

³⁴ See Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; particularly see Instruments of the General Assembly of the Orthodox Presbyterian Church, A.22–23, 19. The instruments of the GA explicitly require presbyteries to follow the procedures outlined here. Presbytery bylaws may require sessions to follow similar procedures by way of exercising review and control (see Stated Clerk, FG 12.2, 16); if not, some comparable procedure must be adopted in order that the presbytery will be able to exercise its responsibility.

³⁵ Responses will vary according to the nature of the particular exception and the particular circumstances surrounding the record to which the exception was taken. For instance, an exception to a presbytery's minutes might be for failure to record the appointment of a moderator or clerk *pro tempore* in the absence of the previously elected officer; the response might acknowledge the failure and state that Mr. So-and-so was appointed to serve *pro tempore* for the duration of the meeting. An exception to a session's minutes might be for failure to record the full name, including middle name, of a candidate for baptism (required by the rules for keeping sessional records in the presbytery's bylaws), where the minutes provide only "A B Smith;" the response might provide the clarifying information that the "A B" in Mr. Smith's name are not initials but rather his actual name, thus arguing for removal of the exception.

³⁶ The roles of recording and corresponding clerks may be analogous to a recording secretary and corresponding secretary in some organizations. This is not the division of labor among the general assembly's stated clerk and assistant clerk, however, where the assistant clerk's primary responsibility is to assist the stated clerk in preparation of the minutes of the assembly for approval and printing for distribution. See Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; particularly see SRGA 3.B.6, 6 for the duties of the assistant clerk of the general assembly.

1. Regular Correspondence

Regular correspondence includes all correspondence properly addressed to the judicatory or sent on behalf of the judicatory. Correspondence may be regularly transmitted by digital means (that is, by email, or email attachment; generally, not via texts, chats, etc.), by electronic facsimile or by postal service, or hand-delivered; but not by voice, whether in person, telephonically, or over video-conference connection.

a. Received

Correspondence received regularly will include that from members (individuals or judicatories) of, or under the jurisdiction of, the receiving judicatory. For example, a session might receive a request from a member of the congregation for a letter of transfer, or a presbytery might receive correspondence from a session or an individual member of the regional church or from a ministerial member of the presbytery.

Regular correspondence will also include that from judicatories (or their representatives) under the same jurisdiction. For example, a session might receive correspondence from another session in the same presbytery, or one presbytery might receive correspondence from another presbytery.

Regular correspondence will also include that from higher judicatories or from fraternal bodies. Sessions and presbyteries may receive correspondence from the stated clerk of the general assembly or from a committee of the general assembly; sessions also may receive correspondence from the stated clerk or a committee of their own presbytery. Generally, correspondence from a fraternal body, including formal fraternal greetings, will be from a general assembly or synod or ecumenical organization (i.e., North American Presbyterian and Reformed Churches or the International Conference of Reformed Churches) to GA, from a presbytery or classis to a presbytery, or from a session or consistory to a session.

All of these communications will be considered formal correspondence; so will judicial appeals, complaints, protests, information regarding requests that require action such as proposals from a higher judicatory to amend a governing document (i.e., confessional standards, BCO, Standing Rules and Instruments of the General Assembly, or bylaws of a presbytery), requests from a congregation for assistance in some situation of distress or opportunity for ministry, and calls to a minister in the presbytery or from a congregation in the presbytery.

Routine correspondence for information will include distribution of minutes of meetings of a higher judicatory or exchange of minutes from a fraternal body.

Information regarding changes in an officer's status will also be received routinely.³⁷ Notice of changes in the status of mission works or congregations may also be received.³⁸ This information, which the stated clerk of the GA requires for directories and databases and the GA statistician requires for his annual report, should be distributed by stated clerks of presbyteries to the stated clerks of all the presbyteries, together with the stated clerk of the GA and his assistants, as well as *New Horizons*.³⁹

b. Sent

See the immediately previous paragraphs on correspondence received regularly and the footnote to the last paragraph for the correspondence that must accordingly be sent by the stated clerk of the GA, the stated clerks of presbyteries, and the clerks of sessions.

Note particularly that the "Book of Discipline" requires that when a minister has been indefinitely suspended or deposed, the judicatory shall immediately notify all the presbyteries of the church.⁴⁰

Note also that the "Form of Government" requires that the presbytery "shall also report to the general assembly each year the licensures, ordinations, the receiving or dismissing of members, the removal of members by death, the organization, reception, union, or dissolution of congregations, or the formation of new ones, and in general, all the important changes which have taken place within its bounds in the course of the year."⁴¹

³⁷ Instances of changes, notice of which should be received by all presbyteries and the stated clerk of the general assembly, include: ordination, installation, transfer in or out (whether from or to another OPC presbytery or to a judicatory in another denomination), dissolution of a called relationship, suspension, erasure, demission, deposition, retirement and/or emeritization of ministers. Similarly, ruling elders' and deacons' ordinations, installations, additions to or removals from active service on the session or board of deacons, etc., would be instances of changes received by the stated clerk of a presbytery from clerks of sessions within the regional church.

³⁸ Organization of a mission work as a particular congregation, realignment of a congregation to or from another denomination, reception of an independent or unorganized group as an organized congregation, closure of a mission work or an established congregation would all be instances of changes that may be received.

³⁹ A recent trend might be observed in an increasing number of stated clerks of presbyteries distributing to other presbyteries and to the stated clerk of the general assembly more than the aforementioned information, such as the bringing of men under care, licensures, and the like. It is generally not necessary to distribute such information, although it should be included in minutes. In some instances, changes in status of a candidate for ministry should be communicated to a GA committee, such as the Committee on Christian Education (e.g., in the case of a funded intern) or the Committee on Home Missions and Church Extension (e.g., in the case of a man who is prospectively to be called as organizing pastor of a work to be funded by the committee).

⁴⁰ Stated Clerk, BD 6.B.3.c and sec. 4.d, 113; the stated clerk of the GA should be copied on this notice.

⁴¹ Stated Clerk, FG 14.6, 21; this information is included in the annual statistical report to the general assembly's statistician, which should be inserted at the end of the presbytery's minutes for the calendar year. Sessions also provide relevant similar information on their annual statistical report, which is to be included in similar fashion in their minutes. See above, 2.A.4, "Other Items" in "Records." Some of this information from presbyteries should be sent to the stated clerk of the general assembly before the submission of the statistical report, namely information that will be included in denominational records, such as the Directory of the Orthodox Presbyterian Church, the Ministerial Register of the Orthodox Presbyterian Church, the OPC website, and a current mailing list for churches and mission works. See the previous paragraphs in this section, 2.C.1, "Regular Correspondence."

Stated clerks of presbyteries are required to report annually to the stated clerk of the general assembly the names and contact information of commissioners to the next general assembly. Notification regarding those commissioners shall be given no later than ten weeks prior to the beginning of the next assembly.⁴² Changes in commissioners and/or their contact information should be likewise reported.

2. Other Correspondence

Other correspondence may be received or sent.

a. Received

Any correspondence that a judicatory *officially* receives, and especially on which a judicatory takes action, should be noted in minutes as having been received and kept in a separate file (not otherwise recorded in minutes).⁴³

b. Sent

Any changes in contact information for ministers or congregations, or changes in moderators or clerks of presbyteries or sessions, should be communicated to the stated clerk of the general assembly as soon as possible.

Clerks should note the requirements of the “Book of Discipline” to submit the entire record of a judicial case on appeal or the papers related to a complaint in an appeal to a higher judicatory, and the reference in the “Form of Government” to extracts of records whenever properly required.⁴⁴

D. Standards (Bylaws)

The clerk of session, the stated clerk of presbytery, or the stated clerk of the general assembly is responsible for keeping and distributing the bylaws of the congregation or presbytery or *Book of Church Order* and the Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, respectively, together with a record of amendments to those standards, which he will generally have some responsibility for editing and formatting, at the direction of and subject to the approval of the judicatory.

E. Dockets

Presbytery and general assembly stated clerks are responsible to prepare a proposed docket or agenda for each meeting of their judicatory. Preparation of proposed dockets

⁴² Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; see Standing Rules of the General Assembly, Chapter 1, rule 8, 3.

⁴³ Not all communications received by the clerk are necessarily *acknowledged* by the judicatory, as some such may be inappropriate for consideration, but the clerk should present all communications for the *judgment* of the judicatory. Communications officially received should be listed with identifying information, such as the date of the communication, the sender, and a brief description of the communication, but the text of the communication is generally not transcribed in the minutes.

⁴⁴ Stated Clerk, BD 7.5, 116 and 9.4, 119–20; Stated Clerk, FG 19.30.

for session meetings may be the responsibility of the clerk or moderator of the session. These are generally prepared by using previous and customary dockets and minutes of previous meeting(s), as well as correspondence received since the previous meeting and other items that have come to attention.

F. Directory

The clerk of session may be responsible for compiling, printing, and keeping a directory of the congregation; he will at least contribute the necessary information to the church secretary or other person who compiles and prints it. Likewise, the stated clerk of presbytery and of the general assembly is responsible for producing a directory of their respective body.

G. Filing and Reminders

Because the clerk is the custodian of records and correspondence as indicated above, he will need to have a filing system, which enables accessibility to these materials. His system must be usable by others, particularly his successors. This certainly includes a system that retains and organizes hard copies of these materials (filing cabinets and file folders appropriately labeled). Organization should be arranged in a chronological order, storing correspondence, dockets, and minutes pertaining to a given meeting together, so that the order of meetings becomes a key to finding relevant materials. An index of meetings will then be useful in finding particular files.

1. Computer Filing

In addition to hard copies, the clerk today will also have digital copies of much, if not all, the materials that he produces and receives. His computer filing system should be similarly organized with a view to accessibility by himself and others. Digital copies in .pdf format are not subject to change on different computer devices, applications, or systems, so materials in other digital formats should also be saved as .pdf files. This avoids the problems that can arise because of different or obsolete computer hardware and/or software. Digital files should be backed up and stored in multiple locations (e.g., external drives, cloud storage, or sent to multiple members of the judicatory) in case of catastrophic loss. Hardcopies should also be made of digital files and included with other hardcopy materials.

2. Calendar Reminders

In view of the many and varied tasks of the clerk, he will benefit from having reminders in a digital calendar, which can be repeated easily. He will thus avoid failure to do regular or occasional tasks, such as some specific required correspondence.

H. Other

The clerk may be called upon to function in other ways apart from his regular duties because he is the most convenient servant of the judicatory to do so.

1. Parliamentary Assistance

As noted below (III.C. Resources: *Roberts Rules of Order, Newly Revised*) (*RONR*), the clerk is often the *de facto* parliamentarian for his judicatory. This is, perhaps, naturally the case, because he must record the motions made and actions taken in a manner that conforms to parliamentary standards. (This is not the place to make the case for having such standards, but the case can certainly be made that without them no actions can have been certainly made with any sure effect.) The clerk is, then, the final gatekeeper for what is parliamentarily admissible before review of records by the next higher judicatory. It will be advantageous to him, to the moderator, and to the judicatory he serves, if he is able to raise or suggest points of order or perfections of language, at the time motions are being made, in order to avoid parliamentary and/or record-keeping problems at a later time.

2. Temporarily Functioning as Other Officers

The Clerk may be requested to serve as acting chair or moderator if circumstances make it impossible or inappropriate for the designated chair or moderator either to remain in the chair or to request another to take the chair at his discretion. Frequently, in our circles, it is customary for a moderator to ask the most immediately previous moderator available to take the chair when the moderator needs to leave the chair to give a report, make a motion, enter debate, or otherwise engage in activity that would be inappropriate while in the chair. However, *RONR* describes a circumstance in which the chair should be turned over to the clerk.⁴⁵

3. Calling Special Meetings

When an emergency or other occasion arises upon which a request is properly made for a special meeting of the judicatory, it is the responsibility of the stated clerk of the GA or of a presbytery to call the judicatory to meet.⁴⁶

4. Congregational Meetings

The clerk of session serves as clerk at congregational meetings, whether annual or special meetings.⁴⁷

III. Resources

Because the clerk is an ordained officer in the church, it may be presumed that he will be sufficiently familiar with the Bible to enable him to commit himself to submit to it unequivocally. Similarly, it may be presumed that he will be sufficiently familiar with the doctrinal standards of the church (i.e., the *Confession of Faith and Larger and Shorter*

⁴⁵ Henry M. Robert III, et al., eds., *RONR: 11th Edition*, §62, “Removal of Presiding Officer from Chair for All or Part of a Session,” 651, lines 24–27 through 652, lines 1–2 and footnote *, 652; or Henry M. Robert III, et al., eds., *RONR: 12th Edition*, §62, “Removal of Presiding Officer from Chair for All or Part of a Session,” 616–17, paragraph 62:11 and footnote 4, 617.

⁴⁶ See Stated Clerk, FG 14.7, 21 and 14.5, 24.

⁴⁷ Stated Clerk, FG 16.4 and 5, 26–27.

Catechisms of the Orthodox Presbyterian Church) to enable him to take vows to “receive and adopt” them “as containing the system of doctrine taught in the Holy Scriptures.”⁴⁸ Thus, more need not be said here about the significance or imperative necessity of these as resources for the clerk. However, a few remarks may be helpful regarding the following resources.

A. The Book of Church Order

While it may be presumed that the clerk, as an ordained officer in the church, will have read the *Book of Church Order of the Orthodox Presbyterian Church* (comprised of “the Form of Government,” the “The Book of Discipline,” and the “Directory for the Public Worship of God”) in order to affirm his approval of them, real familiarity with the BCO by any ordained officer may not be presumed. The clerk must have, at the least, sufficient familiarity with the BCO to know: a) what it requires of him as clerk and of the judicatory he serves (including what must be recorded in certain circumstances); and b) how and where to find relevant passages of the BCO in order to supply the appropriate citation of the BCO when required.

B. Standing Rules and Instruments of the General Assembly

The clerk of the GA and the clerk of a presbytery (as well as assistant clerks) should be sufficiently familiar with the current Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church to know what bearing these will have on their work, including what may be required of them. The clerk of session may benefit from acquaintance with the Standing Rules and Instruments but will not usually need to cite or refer to them.

C. Robert's Rules of Order, Newly Revised

The “Standing Rules” state that “all cases that may arise which are not provided for in the foregoing Rules shall be governed by *Robert's Rules of Order [Newly Revised]*”.⁴⁹ The bylaws of many, perhaps most—possibly all—presbyteries have a similar provision. Congregational bylaws may have such a provision. (If a presbytery or congregation does not have a similar provision, they should have one, whether the governing document is *RONR* or some other similar comprehensive set of parliamentary rules.) The current edition of *RONR* prescribes language and forms of procedure for making motions and taking actions (and thus recording these). It is thus incumbent upon the clerk to be familiar with *RONR* and any equivalent parliamentary authority serving as a standard for the judicatory he serves or for another judicatory to which his judicatory is subject.

Additionally, because the clerk is often the *de facto* parliamentarian of the judicatory he serves, it will be wise and prudent for a clerk to read the current edition of *RONR* in

⁴⁸ Stated Clerk, FG 23.8, question (2), 47 and 25.6.b, question (2), 70.

⁴⁹ Standing Rules and Instruments of the General Assembly of the Orthodox Presbyterian Church, last modified 2021–22, <https://www.opc.org/GA/StandingRules2021-2022.pdf>; see Standing Rules of the General Assembly, 14.1, 16.

order to acquaint himself, if not to familiarize himself, with its contents. It is the only way to know all that might be required, especially in unusual circumstances.

The clerk does not necessarily need to be an “expert in the book” (either BCO or *RONR*), but he ought to know how to find applicable passages of the book in question and, importantly, when he needs to look for them.

D. Presbytery Bylaws (For Stated Clerks of Presbytery and Clerks of Session)

The stated clerks of presbytery and clerks of session should be quite familiar with the bylaws of the presbytery that they serve or that govern the regional church of which their congregation is a member. The presbytery’s bylaws will state the duties of the stated clerk of presbytery and provide the rules for keeping sessional records in detail not included in the BCO or *RONR*.

E. Congregational Bylaws (For Clerks of Session)

The clerk of session should be familiar with the bylaws of the congregation he serves, so he will know particular requirements to which the session and congregation are subject, which requirements apply to the congregation, and which may vary somewhat from congregation to congregation. He may thus give some guidance to the session and the congregation in their meetings.

F. Directories

The clerk will need to have directories of the judicatories subordinate to and superior to his own, as well as the directory of his own judicatory (and/or congregation).

G. Minutes (Yours and Those of Higher Judicatories)

Finally, the clerk will benefit from familiarity with the previous minutes of his judicatory and acquaintance with the current and previous minutes of higher judicatories, so he knows what actions have been taken which may bear on his own work and the work of his judicatory.

Conclusion

Presbyterians have a reputation for their desire to adhere in all things to 1 Corinthians 14:40, “But all things should be done decently and in order.” The clerk is in a position to help ensure that the work of his judicatory is orderly, and is, of course, responsible to see that his own labor is also done decently and in order. The work of the clerk is varied and sometimes tedious and may sometimes, in meetings, tax the patience of the body he serves. However, it is work done in service to the Lord of the Church. So, he can do it with joy and zeal.

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