

# Serving as Clerk of Session

*Some tasks and tips for clerks of session*

## Introduction

Have you agreed to serve as clerk of session and now find yourself wondering what you have done? Read on to learn about your responsibilities as put forth in the Constitution of the Presbyterian Church (U.S.A.) . . . and other duties you might be asked to do.

The first thing to know is that the *Book of Order* is your handbook. Although it says little about clerks, you will want to become familiar with it, either in print form or online at the denominational Web site, [www.pcusa.org](http://www.pcusa.org). The *Book of Order* has four sections: the Foundations of Presbyterian Polity, the Form of Government, the Directory for Worship, and the Rules of Discipline. For clerks, the important section is the Form of Government. You won't need to go to the Rule of Discipline unless a case regarding a member of the congregation is brought before the session. If that happens, confer immediately with the stated clerk of your presbytery.

## Two Officers

According to the *Book of Order*, two officers govern the session: the moderator and the clerk (G-3.0104). But don't let this power go to your head. Other officers are elected by the session or may be mandated by the incorporation statutes of the state. The moderator is ordinarily the clergyperson installed as pastor of the congregation. The clerk "shall be a ruling elder elected by the session for such term as it may determine" (G-3.0104). Your tenure can be a year or forty years, but you are elected for a specific term. Some sessions elect the clerk for one year at a time; others, for longer terms, such as three or five years. "Clerk for life" is not a specific term, however.

Some sessions elect a clerk from those ruling elders on the session, while other sessions select someone not currently on the session. If you are currently serving on the session, you have voice and a vote. If you are not on the session now, you do not have a vote and should refrain from speaking except to ask for clarification for the minutes. If you have pertinent information from past minutes or records for the matter under discussion, you may request the floor from the moderator in order to offer that information. As one who has served under both condi-



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tions, I recommend a clerk who is not currently serving on the session. You have plenty to do to record the meeting faithfully without trying to formulate a comment or decide how to vote.

## What Do Clerks Do?

The basic duties of the clerk of session can be found in the Form of Government (G-3.0104). However, that short list is a bit misleading and is certainly an understatement. So here you will find a bit more information about what those responsibilities actually entail.

*The clerk shall record the transactions of the session.* No doubt, you expected this responsibility. After all, "clerk" is another word for "secretary." You may even have accepted this office because you enjoy taking minutes. (Yes, some of us actually do.) Note the word "transactions." You need not record every statement pro and con during a discussion. Technically, all that is required are any motions before the session, the votes taken, and whether or not they passed. Generally the vote is not recorded, except when voting on a call of a pastor. However, it is good practice to note a unanimous vote if the topic is controversial. For the sake of historians in the future, you might want to add a bit more. But the minutes of the session are not a gossip rag, so keep personalities out of the recording and certainly do not add comments of your own (good or bad) about the business reported.

The minutes should indicate the type of meeting (stated, called or special, or adjourned), the name of the body (for example, Session of First Presbyterian Church, Baldwin,

## Some Ideas for Recording Session Transactions

- Ask the maker of a motion that is substantive to give it to you in writing.
- Read minutes of previous meetings as a guide. If you feel they are not adequate, read the minutes of a meeting of your presbytery. Another source for the basic format for recording minutes can be found in *Robert's Rules of Order* (I.41).
- Distribute the minutes before the next meeting of the session to allow time for them to be reviewed thoroughly. And don't take corrections personally.
- Don't forget to sign the minutes after they have been entered into the official book.
- The records of the congregation held by the clerk are to be examined annually by the presbytery (G-3.0108). Keep up to date with minutes and membership rolls.

Illinois), the date and place, the time it convenes and adjourns, the presider's name, and the names of those present. Each session meeting is opened and closed with prayer by mandate of the *Book of Order* (G-3.0105), and that is to be noted in the minutes as well.

*The clerk keeps the congregation's rolls of membership and attendance.* Perhaps this is a surprise to you. Yes, you are responsible for keeping the membership rolls accurate and up to date. I once heard about a new clerk who had opened the membership rolls book and found that nothing had been recorded for the previous thirteen years. Not a good idea!

Maintaining the membership rolls means that letters requesting transfers of membership will come to you to be directed to the session for action. Either you or the church office will issue the letter of transfer after it has been approved by the session.

As new members join, they are listed on the rolls, indicating how they joined (transfer of membership, reaffirmation of faith, or profession of faith). You may be responsible for writing the letter of transfer. Do so promptly. The death of a member is also recorded in the membership rolls. For specifics on types of membership and the information recorded about the membership, see G-1.04.

Baptisms are also entered into the records book, so be sure the pastor obtains all the information needed when meeting with the family. Some hints to make this task easier are:

- Provide forms to be completed by new members and parents of children who are baptized. This will save you hours of searching for such information as the maiden name of the mother or the name of the church to request a transfer. Check with the stated clerk of your presbytery or other clerks of session for sample forms.
- Keep the membership records up to date, rather than entering all the information at the end of the year. You have enough to do then as you prepare the report that goes to the General Assembly (GA) in February.
- As soon as the GA report form is available online, begin to gather the information, which will come from a variety of sources. Filing your report early is encouraged.

*The clerk shall preserve the records carefully.* Where are the official records stored? Not under your bed, I trust, although I have heard such rumors. More information on the permanent safekeeping of records is found in G-3.0107. According to Margery Sly of the Presbyterian Historical Society, the best way to preserve these records is to put them on microfiche. Records that you no longer need to keep for handy reference can be taken to the Presbyterian Historical Society or one of the seminaries of the denomination for storage in a temperature- and humidity-controlled environment. For more information or if you have specific questions about storage, contact the reference desk at the historical society, 215-627-1852 or [refdesk@history.pcusa.org](mailto:refdesk@history.pcusa.org).

*The clerk shall furnish extracts from the records when required by another council.* This responsibility is the final one listed in G-3.0104. You are not likely to be called on to do this unless the information is requested as evidence by a higher council.

## Recommendations Regarding Records

- Find out what the previous clerk did regarding storage. Today is not too late to start on the right road.
- If your congregation has a historian, work with that person to see that the history of your congregation is properly sorted and preserved.
- Check out the Web site of the Presbyterian Historical Society at [www.history.pcusa.org](http://www.history.pcusa.org).



Use your good sense about what to report to the session. Certainly correspondence from higher councils must be reported. If in doubt, confer with the moderator.

and clerk communicate about the docket before the meeting, meetings run more smoothly and the clerk can be more helpful to the moderator during the meeting. Generally, it is the clerk's task to distribute the docket to the session. With e-mail, the clerk can easily send this along with the other materials for the meeting.

*Correspondence.* Occasionally the session will instruct the clerk to write a letter. A common request is to thank a ruling elder or deacon who has resigned for his or her service and to acknowledge that the resignation was acted upon. Use church letterhead and write the letter as soon as possible. Mail of all sorts will come to the church addressed to the clerk.

## And What Else?

*The clerk shall be secretary of meetings of the congregation.* Because clerks are elected to serve as an officer of the session, the Form of Government (G-1.0505) specifically appoints the clerk as the secretary for any congregational meeting. While this task probably does not surprise you, you may not be aware of the specifics when it comes to approving the minutes of a congregational meeting. Here are the options:

1. You read the minutes before the adjournment, and the congregation approves them on the spot. (This is not as overwhelming as you might think. For routine meetings, such as the election of officers, develop a template based on the previous meeting for this purpose and fill it in as the meeting takes place. You can't imagine how this impresses the congregation as well.)
2. If that does not happen, the minutes can be approved by the session, and that action is reported to the congregation the next time it meets. In that case, you are to have copies of the minutes available. The congregation may ask to have the minutes read, and additional corrections can be made. (I don't know about your congregation, but I can't imagine anyone requesting that the minutes be read at one of our congregational meetings.)
3. While the clerk signs the session minutes, the clerk and moderator both attest to the accuracy of the minutes of a congregational meeting by signing those minutes.

The minutes of congregational meetings are entered into the session minutes book.

## Tasks That Are Not Specified in the Form of Government

As with every office or job, you will likely discover some expectations that no one told you about. Perhaps you have already discovered some of them.

*Meeting docket.* Some moderators prefer to set up the agenda or docket for the meeting themselves. Others are happy to let the clerk take care of it. In either case, when the moderator

### Hints for Survival That You Won't Find in the Form of Government

- Set up a list of agenda items done annually. See the sample in the appendix. Begin with the minutes from the previous year. This will help you remember such things as approving the dates for the celebration of the Sacrament of the Lord's Supper annually . . . if you don't forget to look at your list.
- Review the minutes of a year ago before a stated meeting. This is especially important if you are still developing an annual chart.
- Always review the minutes of the previous meeting before determining the docket for the next meeting. Look for baptisms that have been approved and must now be entered as having taken place. Is there unfinished business?
- Get any checklist for the annual review of the minutes and membership records used by your presbytery. The first year I took the records for review was the first time I saw this very helpful sheet. Now I use it to be sure that the membership records are complete and that the session has complied with all requirements, such as the annual meeting of the deacons with the session.
- Sit next to the moderator at the meeting. You want to be close enough to whisper a reminder, such as "No one has seconded that motion." Or you might even give a nudge and say, "Let's move this meeting along."
- Keep your sense of humor. This is a joyous task, not drudgery.

Some of it, junk mail, can go right to the recycling bin. Use your good sense about what to report to the session. Certainly correspondence from higher councils must be reported. If in doubt, confer with the moderator.

*Parliamentarian.* Although the moderator of the session will be thoroughly acquainted with the *Book of Order* (having been required to pass an ordination test on it) and is the officer who rules on points of procedure, she or he may turn to you for assistance. Take some time to become acquainted with the *Book of Order* and with *Robert's Rules of Order*. At least know your way around the two sources so you can research an answer quickly.

*Other tasks.* You know that most job descriptions include “and other tasks as determined by.” Well, the moderator may have some of those tasks in mind, or they may crop up from time to time in particular session business. One such task may be to moderate the session meeting or the congregational meeting when the call of the pastor(s) is reviewed.

Additional responsibilities will come your way when your congregation is without a pastor. When that happens, become very friendly with the presbytery committee on ministry.

Truly, when the moderator and clerk communicate and work well together, serving as the clerk of session is a joy and an honor. As I said to the moderator who asked me to be clerk nine years ago, “Why, I can’t think of anything more interesting than to be at session meetings without a committee responsibility!” I think he almost dropped the phone, but I continue to find it interesting and challenging, even a kind of spiritual discipline. I pray that this will be true for you too.

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#### About the Writer

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# Checklist for the Clerk

**Note:** This is a sample for you to adapt to your particular congregation.

- Every month** Report significant correspondence, baptisms performed, and communions celebrated since previous meeting.  
Approve minutes of previous meeting.  
Approve planned baptisms.  
Report weddings performed by clergy or in church building by other clergy.  
Keep membership book up to date with new members, transfers, baptisms, deaths, and weddings.  
Distribute minutes and other materials pertinent to the meeting to the session.
- January** Begin working on the statistical report for the General Assembly, so session can approve it before it is submitted.  
Elect commissioners to the presbytery.  
Prepare list of times to celebrate the Sacrament of the Lord's Supper for approval by session or get the list from the pastor or appropriate committee.  
Schedule a congregational meeting to elect deacons, ruling elders, auditing committee, and members-at-large for the nominations committee.
- February** Submit statistical report to the General Assembly.  
Send list of presbytery commissioners to the presbytery.
- March** Prepare a report for the annual report of the congregation, if requested.  
Serve as secretary for the annual meeting of the congregation.
- April**
- May** Sign the confirmation certificates.  
  
Although not a requirement for sessions, many clerks provide the nominating committee with a statement about the composition of the session and board of deacons and how it matches the composition of the congregation (see G-3.0111).
- June** Elect officers of the corporation.
- July** No session meeting.
- August** No session meeting.
- September** Approve list of church school teachers and any changes in curriculum.
- October** Prepare minutes and membership rolls for presbytery annual review.
- November** Attend annual meeting with board of deacons.
- December**