

# Report Writers Guide for the 225th General Assembly (2022)

The Report Writers Guide provides general instructions for writing reports on behalf of entities, commissions, and committees to the General Assembly. An additional guide for how to submit reports is available through PC-Biz, entitled *Report Submission Guide for the 225th General Assembly (2022)*.

This guide was developed in conversation with many partners to ensure each report receives the best chance for equitable discernment by commissioners and advisory delegates.

Before you begin, take a moment to review the guide, and please keep in mind that reports from entities, commissions, and committees of the General Assembly must be submitted by **11:59 EST on Friday, February 18, 2022**.

## Contents

Deadlines and Word Limits

Principles of Report Writing

Equity in Report Writing

Reports with Recommendations

Reports without Recommendations

Agency Summaries

Referrals

Comments and Advice

Formatting Reports

Copyright

Financial Information

Submission Preparation Tool

Submission

Deadlines

Questions or more information? Contact **Kate Trigger Duffert**, Manager for General Assembly Business and Per Capita Promotion, at [kate.duffert@pcusa.org](mailto:kate.duffert@pcusa.org).

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## Deadlines and Word Limits

All reports from entities, commissions, and committees of the General Assembly must be submitted through PC-Biz **on or before the [120-day deadline](#)**. Please be advised that PC-Biz will automatically prevent the ability to submit reports after 11:59 EST on that day.

**All reports shall be limited to 5,000 words**, except the report of the Presbyterian Mission Agency, which will be determined by the Stated Clerk and Executive Director of the Presbyterian Mission Agency.

Requests for length exemptions are due to the Stated Clerk **[45 days prior to the 120-day deadline](#)** (or 165 days prior to the assembly convening). Requests should include the anticipated length of the report. Approval of these requests is not guaranteed; therefore, report writers should engage creative ways of sharing information, such as charts, video links, and

additional attached resources. Should a request be granted, the Stated Clerk may assess a fee for the costs of preparing the additional text for publication. In addition, the body may be asked to submit an executive summary of no more than 800 to 1,000 words. If the Stated Clerk and the representative(s) of a body are unable to come to an agreement, the Committee on the Office of the General Assembly will determine the length of the report.

Reports recommending amendments to the *Book of Order* should be both submitted through PC-Biz and emailed to Laurie Griffith at [laurie.griffith@pcusa.org](mailto:laurie.griffith@pcusa.org) as reference for the Advisory Committee on the Constitution. Reports recommending amendments to the Standing Rules of the *Manual of the General Assembly* should be submitted in PC-Biz and emailed to Kerry Rice at [kerry.rice@pcusa.org](mailto:kerry.rice@pcusa.org) as reference for the Office of the General Assembly.

A complete list of [deadlines](#) is available at the end of this guide.

## Principles of Report Writing

When writing a report, it is important to consider the accessibility of the content. Commissioners and advisory delegates are expected to consider a large amount of business throughout the assembly. A report that reflects the following considerations sets the stage for quality engagement and discernment throughout the General Assembly.

**Embrace brevity.** State the recommendation or resolution and then write one or two important points to support its approval.

**Organize.** Use headings and alphanumerical indicators to make information easy to find.

**Present creatively.** While the PC(USA) has a history of emphasizing the written word, we recognize the diverse learning and cultural communication styles that shape commissioners and advisory delegates. Charts, images, and links to video/audio/websites improve accessibility and form more opportunities for your report to be well-understood. When using audio or video, you are encouraged to include captions and interpretation into Spanish, Korean, and/or English.

**Be clear.** Recommendations should use strong action words to spell out exactly what you want done, by whom, and by when. For example: “*Encourage the PC(USA) to review*” is not as effective as “*Direct the Office of the General Assembly to review by the 226th General Assembly.*”

**Use Additional Resources.** The report should be limited to recommendations and a brief rationale that supports the actions being taken. Any supporting information, such as narratives and surveys, should be included as an Additional Resource. These documents will be considered only as part of the assembly’s vote on the recommendation if the recommendation includes language such as:

**... approve the attached Study Guide for use by the Presbyterian Church (U.S.A.) and distribute to all mid council stated clerks by email.**

Items in Additional Resources intended for voting approval may be copy edited by the assembly prior to possible approval. Writers are strongly encouraged to seek translation of these documents into Spanish and Korean through Global Language Resources. Information on how to upload these resources to your submitted reports is available in the *Report Submission Guide*.

## Equity in Report Writing

As report writers consider the contents and formatting for their report, including those proposing new studies or programs, they are encouraged to approach this work with a lens for equity. A few questions to consider:

- Who has been at the table since the start of composing this report?
- Who is being empowered to tell their own story and who is having their story told for them?
- Have advocacy committees, caucuses, and/or other parties of the church been consulted?
- Does the report provide ways for people with differing learning and cultural communication styles to access the information?

- Does the language used in the report require “insider knowledge”? (e.g., unexplained acronyms, highly specialized language, references to other events or actions without description or link to sources)
- Does the report use inclusive language for people and expansive language for God? See: [Well Chosen Words](#) from Racial Equity and Women’s Intercultural Ministries of the Presbyterian Mission Agency.
- Are all influences and contributors cited and recognized?
- Will all collected data support transformation of communities rather than simply an accrual of statistics?

## Reports with Recommendations

### Recommendations

When writing a recommendation, report writers should observe the following:

**Use boldface type.**

**Use specific and concise directives.** The language chosen for a recommendation can inform financial implications, who will be responsible for completing the work, and any necessary follow-up by future assemblies.

**Format the recommendation according to one of the styles below:**

- Original items arising from the work of the agency/committee/commission or in response to business referred from a previous assembly: **The [agency/committee/commission] recommends that the 225th General Assembly (2022) \_\_\_\_\_.**
- Original items with more than one recommendation: **The [agency/committee/commission] recommends that the 225th General Assembly (2022) direct ... [or] authorize ...**
- Recommendations that emerged from a referred item should include the title of the referral in the first paragraph: **This recommendation is in response to the following referral: [Referral Year] [Referral Number] [Referral Title] [(Minutes citation)].**

Referral information can be found in the *Minutes of the General Assembly* for the appropriate year. These are available online at <https://oga.pcusa.org/section/ga/ga/publications/>.

This is an example of a formatted referral title:

*2014 Referral: 25.037. Response to Recommendation Directing ACSWP to Develop Resolution Addressing Need for Advocacy on Behalf of Uninsured Persons, Especially with Low Incomes, with Necessary Funding, for Presentation to the 221st General Assembly (2014)—From the Advisory Committee on Social Witness Policy (Minutes, 2014, Part I, pp. 41, 308).*

### Rationale

The rationale is a brief statement that provides insight into the reasons for a recommendation. The material included in the rationale is for information only and is not a part of the action nor does it become a policy of the Presbyterian Church (U.S.A.). The rationale provides context for commissioners as they consider the recommendations of the report and should be limited to supporting statements. Any text within the rationale that calls for action (including the approval of reports or minutes) will not be considered by the assembly.

### Unique Recommendations

- **Letters from the Stated Clerk.** Should the recommendation include a request asking the Stated Clerk to send letters, the text of the letter and the names and addresses of the recipients should be an Additional Resource. The assembly may choose to edit this document prior to approval. Participants will receive instructions for this parliamentary process prior to the General Assembly.

- **Study Guides.** Study guides should not be included in the text of the recommendation or rationale. If a recommendation includes the approval and distribution of a study guide, it should be attached as an Additional Resource for the commissioners to use during their discernment. The assembly may choose to edit this document prior to approval. Participants will receive instructions for this parliamentary process prior to the General Assembly.
- **Letters or information to be sent to the church at-large.** If a recommendation includes sending a resource to the PC(USA) at-large, it should include the format and who will send it and who should receive it. For example:
  - ... direct the Office of the General Assembly to distribute [resource] via email to all stated clerks.

The assembly may choose to edit this document prior to approval. Participants will receive instructions for this parliamentary process prior to the General Assembly.

## Reports without Recommendations

Reports that do not include recommendations will be shared with the General Assembly for information only. These reports should also follow the 5,000-word limit.

## Agency Summaries

The format of agency summaries will be determined by the Presbyterian Publishing Corporation. These files should be uploaded into PC-Biz in a Word document as a Report without Recommendations.

## Referrals

Referrals sent from previous General Assemblies to an agency are tracked as either a Referral in Progress (i.e., the work is ongoing) or a Final Response to Referral.

### Referral in Progress

Referrals **in progress and not yet complete** will be included in an informational chart for the General Assembly plenary, with only the referral title, the responsible entity, and the anticipated year of final response.

Referrals **in progress that were instructed to provide a progress report** to the assembly should submit an informational report that includes the name of the referral, a brief progress update, and expected outcomes.

### Final Response to Referral

Referrals that have been completed and **do not have recommendations** should include a brief summary outlining what occurred as a result of the referral. This should be in a file separate from any referrals in progress.

Referrals that have been completed and **have recommendations** should be submitted as a Report with Recommendations. The title of the original referral and the title of the report should be listed in the file with Final Response to Referrals but without additional summary.

## Comments and Advice

### Comments

Entities of the General Assembly, organizations in which the PC(USA) holds membership, and other denominations in correspondence with the General Assembly are empowered to provide insight on business already under consideration by the assembly in the form of comments. Comments must:

- be written in response to business that does not originate from one's own entity**
- not exceed 1,000 words for each item**
- be submitted no later than the [45-day deadline](#)\***
- not include new business recommendations**

*\*Comments may be submitted later for items of business posted after the 45-day deadline, e.g., Commissioner's Resolutions or Overtures submitted and concurred on or close to the final deadline.*

## Advice and Counsel

Advisory and Advocacy Committees may submit advice about existing policy, current work on specific topics, recent developments, and other factors that may be useful to commissioners as they consider an item of business. **Advice and counsel should follow the parameters listed above for comments, with the exception of the word limit, although the 1,000-word limit should be considered in order to embrace brevity.**

Advice and counsel may come from the Advisory Committee on Social Witness Policy (ACSWP), the Advocacy Committee for Women's Concerns (ACWC), the Racial Equity Advocacy Committee (REAC), and the Advisory Committee on the Constitution (ACC).

## Formatting Reports

Please ensure the report has met the following guidelines before it is submitted.

- Documents must be uploaded in a Word file (.doc, .docx).
- Margins should be set as follows:
  - o Top .25
  - o Bottom .25
  - o Left .75
  - o Right .75
- Typeface for general text should be 10 pt Times New Roman.
- **Only recommendations should be in bold.**
- Block quotes should be indented .25 from the left and in 8 pt font.
- Appendixes and attachments should be in 9 pt font.
- Do not include headers or footers, track changes, comments, or additional formatting features.
- Charts and images may be included in text, however, they should also be submitted as individual resource materials in either a .jpg or .png file.

**Each Report with Recommendations and Report without Recommendations should be submitted in a separate file.** In addition, you may submit:

- 1 file for Final Response to Referral
- 1 file for Referral in Progress
- 1 file for Agency Summaries

## Copyright

Permission must be obtained in writing to use the following content in a report: sermons, poems, songs and hymns, short works, websites, long quotations from a larger work, photographs, and other images covered by copyright law.

The author of the report is responsible for securing this permission. Brief quotes from periodicals, books, or other copyrighted material do not need permission but should be accurately referenced using the exact source of such material. If citing a brief quote, include the following with the report:

- scan/copy/image of the quoted material in its original context
- scan/copy/image of the title page of publication (including the author and publisher's information)

If you are unsure if your report requires copyright permissions, err on the side of caution and contact the copyright holder.

## Financial Information

**A Financial Implications worksheet must be uploaded as a resource with all Reports with Recommendations**, even if the recommendations do not contain financial implications. A copy of the form is available at the end of the guide.

Any report with financial implications that may impact the budget of another entity **must include evidence that the budget manager or other relevant staff member from that entity has been consulted prior to the submission of the**

**report.** This can take the form of a .jpg, .doc, and/or .pdf that documents an email exchange or includes a statement signed by the relevant contact. This file should be uploaded in addition to the report and the Financial Implications form. In order to complete this form accurately or to access an Excel spreadsheet version of the file, contact DeAmber Clopton in the Office of the General Assembly at [deamber.clopton@pcusa.org](mailto:deamber.clopton@pcusa.org).

## Submission Preparation Tool

A preparation tool for finalizing reports is available. By moving through a series of yes or no questions, writers and submitters can confirm if there are outstanding items to be completed or if the report is ready to be submitted. Writers and submitters are encouraged to refer to this tool as they complete the different forms and until they receive confirmation that they are ready. The tool can be found here: <https://forms.gle/dkpwd59hqYSf2wqGA>.

## Submission

All reports should be submitted into PC-Biz using the designated login information for the entity, committee, or commission authoring the report. Further information on submitting these reports through PC-Biz can be found in the *Report Submission Guide for the 225th General Assembly (2022)*.

Resource material may be added to a report once the initial file has been uploaded. This includes financial forms, images, appendices, and study guides.

Referral documents and other reports without recommendations, including agency summaries and committee minutes, may be uploaded as a Report without Recommendations.

Once submitted, the Office of the General Assembly will have the reports copy edited and the recommendations translated. When these steps are complete, the report will be made available for public viewing on PC-Biz. Until that point, only submitters will be able to see and track their reports.

Information on submitting comments is also available in the *Report Submission Guide for the 225th General Assembly (2022)*.

## Deadlines

<b>180-day deadline</b>	<b>December 20, 2021</b>	Commissioners and Advisory Delegates submitted
<b>165-day deadline</b>	<b>January 4, 2022</b>	Requests for report extensions to Stated Clerk
<b>120-day deadline</b>	<b>February 18, 2022</b>	Overtures requesting amendments to/interpretation of Book of Order
		Decisions regarding referral of 224th overtures
		Reports
		Recommended deadline for decisions re: 224th
		Reports
<b>60-day deadline</b>	<b>April 19, 2022</b>	Overtures with financial implications
<b>45-day deadline</b>	<b>May 4, 2022</b>	All other overtures
		Concurrences
		Comments
<b>30-day deadline</b>	<b>May 19, 2022</b>	Slate of nominations

*Note: All overtures require at least one concurrence before the due date to which the overture itself is subject. All remaining concurrences must be submitted before the 45-day deadline.*

## Sample Reports and Referrals

### Report with Recommendation

The General Assembly Committee on Ecumenical and Interreligious Relations nominates the following churches to the 224th General Assembly (2020) to invite to the 225th General Assembly (2022):

***International:*** The Presbyterian Church of Trinidad and Tobago, Iglesia Reformada Calvinista de El Salvador (Reformed Calvinist Church of El Salvador), Presbyterian Church of Vanuatu, Christian Church of Fiji and Samoa, Gereja Masehi Injili di Minahasa (Indonesia), Spanish Evangelical Church, National Evangelical Synod of Syrian and Lebanon, Presbyterian Church of Rwanda, Church of Jesus Christ in Madagascar, South Sudan Presbyterian Evangelical Church.

***United States and/or Canada Churches:*** Christian Church (Disciples of Christ), Progressive National Baptist, Inc., Syrian Orthodox Church of Antioch, Reformed Church in America, Korean Presbyterian Church in America.

#### ***Rationale***

The General Assembly Committee on Ecumenical and Interreligious Relations nominates to each General Assembly churches to be invited to send ecumenical advisory delegates to the subsequent assembly (Standing Rule B.2.g.). Ten overseas churches and five churches from within the United States are recommended. Of the overseas churches, we recommend at least one church from each area staffed by the World Mission area. Of the churches within the United States, we recommend at least one church from full communion and/or covenant relationships, and at least one church in our conciliar relationships.

### Referral in Progress

*Item 05-09. Commissioners' Resolution: On the Challenge of Being Black in the PC(USA). Recommendation 1. Reaffirm the Committee on Representation Requirements for Inclusiveness as Stated in the Constitution (G-3.0103), Paying Careful Attention to Issues of Inclusiveness and Fair Practices by the Pastor Nominating Committees and Committees on Preparation for Ministry. (Minutes, 2018, Part I, pp. 24, 224).*

Final response will be presented to the 225th General Assembly (2022).

### Referral in Progress with Report

*2018 Referral. Item 03-06: 4. Direct the General Assembly Nominating Committee to Share Representation Data on All Applicants for Service on Bodies for Whom They Nominate on Regular and Timely Basis. (Minutes, 2018, Part I, pp. 65–66, 164–65)*

Progress Report: The General Assembly nominations database is currently in the process of being enhanced and developed by a contracted software company. One of the reporting functionality enhancements will provide General Assembly Committee on Representation staff with the ability to pull down representation data on all applicants and currently serving members in real time. This enhancement is scheduled for future production. Because these enhancements are still in the planning and development stages, sharing reports on statistical data is delayed and must be done manually. As of the publication of this response, the portal for new applicants is still open; once the portal is closed, a manual report will be provided to the GACOR. Reporting functionality through the database is expected to be available in Fall, 2020. A final response to this referral will be reported to the 225th General Assembly (2022).

### Final Response to Referral without Recommendation

*2018 Referral: Item 04-05. Report of the All-Agency Review Committee to the 223rd General Assembly (2018). Recommendation 5. Instruct the Six Agencies of the Presbyterian Church (U.S.A.) to Engage in a Collaborative Self-Study of the Per Capita Model and Its' Ability to Adequately Fund the Office of the General Assembly and the Presbyterian Mission Agency in the Immediate and Longer-Term Future and to Explore Alternative and Creative Funding Resources for Both. (Minutes, 2018, Part I, pp. 44, 49, 176–78).*

*Response:* The Board of Pensions appreciates the opportunities to collaborate on the work of the church. The Stated Clerk combined this recommendation with others to create the Special Committee on Per-Capita Based Funding and National Church Financial Sustainability. The Board was asked to provide multiple years of financial data. Our president met with the committee at its initial face-to-face meeting in Fort Worth, Texas, and provided a presentation on the financial structure of the Board, answering questions derived from the written report and the oral presentation. Subsequently, the committee sought additional insight by conducting a detailed survey of each agency executive. The Board provided full and forward-looking answers about current realities and potential alternatives. That survey was followed by another two-day meeting in Dallas, Texas, where those survey results and ideas were discussed. The Board has completely fulfilled this recommendation.

## **Final Response to Referral with Recommendation**

*2018 Referral: Item 10-01. On an Initiative to Repair Critical Infrastructure Needs of the Churches and Properties in the Historic Native American and Alaskan Native Mission Field of the PC(USA). Recommendation 2. Report—Findings of the Inventories Will Be Reported to All Responsible Parties During the Two Years Between Meetings of General Assembly and a Report Would Be Made to the 224th General Assembly (2020) in Baltimore, Maryland. To Be of Value, This Report Must Contain Estimates of the Identified Repairs and Improvements. Of Equal Value Is the Necessity to Provide a Mechanism to Prioritize the Repairs and Improvements and the Associated Estimated Costs—From the Presbytery of Grand Canyon (Minutes, 2018, Part I, pp. 28, 29, 279 of the print copy, pp. 809–11 of the electronic copy).*

*Response:* This referral is answered by the “Native American Church Property Report,” refer to *(Item number to be inserted by OGA)*.

Referrals and Referrals in Progress from 2020 are available at <https://www.pc-biz.org/#/search/3000721>.

Examples of reports and other items from past assemblies can be found at <https://www.pc-biz.org>.





**225th General Assembly (2022)  
 Presbyterian Church (U.S.A.)  
 Financial Implication Cost Worksheet**

<b>Item Title:</b>	<b>Item #:</b>
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<b>Requested Action(s):</b>

<b>Resource Person(s):</b>
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<b>Cost Component(s):</b>	<b>2023</b>	<b>2024</b>

<b>Annual Cost:</b>	\$0	\$0
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<b>Total Cost:</b>	\$0
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<b>Source of Funding:</b>	<b>Per Capita:</b>	OGA [ ]	PMA [ ]
	<b>PMA:</b>	Unrestricted [ ]	Restricted [ ]

<b>Prepared By:</b>	<b>Date:</b>
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<b>Per Capita Authorization:</b>	<b>Date:</b>
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<b>PMA Authorization:</b>	<b>Date:</b>
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<b>Committee Action</b>
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<b>Amendments:</b>	YES [ ]	NO [ ]
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<b>Committee Suggested Sources of Funding to Support the Action:</b>

<b>Committee Action:</b>	Approved [ ]	Disapproved [ ]
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<b>Approved with Attached Amendment(s):</b>	[ ]
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<b>Committee Assistant:</b>	<b>DATE :</b>
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**225th General Assembly (2022)  
Presbyterian Church (U.S.A.)  
Financial Implication Cost Worksheet**

**Item Title:**

**Item #:**

**Requested Action(s):**

**Resource Person(s):**

**Cost Component(s):**

**2023**

**2024**

**Annual Cost:**

\$0

\$0