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The University of San Francisco

'FORMATION IN DISTINCTIVE DIMENSIONS OF OUR WAY OF PROCEEDING':
PREPARATION OF LAY DIRECTORS OF WORKS IN JESUIT SCHOOLS

A Thesis
Presented to the Faculty of the School of Education of the
University of San Francisco

In partial fulfillment of the requirements for the degree of

MASTER OF ARTS
in
Catholic Educational Leadership

By
Perry T. Petrich, S.J.

Spring 2020

This thesis, written by
Perry T. Petrich, S.J.
University of San Francisco
15 August 2022

under the guidance of the project committee,
and approved by all its members,
has been accepted in partial fulfillment
of the requirements for the degree

MASTER OF ARTS

In

Organization and Leadership

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Prof. Jane Bleasdale

(Faculty Advisor)

14 August 2022

Acknowledgements

So many people have worked for each of us to get each us to where we are. Our accomplishments depend on the generosity of so many other people.

Of course, for me, that starts with my parents. Their love and support and hustle to offer me a great education is the first reason that this work is complete. I especially want to acknowledge my Dad who passed away during the writing of this thesis. Without his emphasis on education and unconditional support in my studies, I would not be here.

I want to thank Jane, Ursula, Mike, Alex, and all of the faculty and staff of the Catholic Educational Leadership program. I learned a lot and had a lot of fun. You pushed me to grow in all kinds of ways. I also want to acknowledge my classmates. It was a privilege and joy to learn alongside this community. I hope to collaborate with each of you long into the future.

Let me also acknowledge Cristo Rey De La Salle East Bay High School at St. Elizabeth campus where I interned while completing this degree. My gratitude to all of the students there and all the faculty and staff. No worker is harder than starting a school but no work is more rewarding either.

I would also like to thank my Jesuit brothers. Without their love and support, none of this would be possible. I especially want to acknowledge Chris, who hounded me to finish this thesis up and Scott who missioned me to study in this program.

Abstract

The purpose of the study was to determine how lay directors of works in Jesuits West secondary schools can be formed to best serve as faith leaders. The study consisted of secondary research in which interview data and surveys from studies on lay formation in Jesuit universities and lay leadership of Bay Area Catholic High Schools were used to determine whether or not formation of lay directors of works in faith leadership is possible, what the objectives of that training should be, and how that training can be offered. This analysis determined that lay formation is both possible and necessary. It also found that lay formation should focus on both the interior spiritual lives of the leaders as well as their familiarity with the history, philosophy and jargon of the Jesuits. Programs now exist that successfully accomplish those two goals.

‘FORMATION IN DISTINCTIVE DIMENSIONS OF OUR WAY OF PROCEEDING’:

PREPARATION OF LAY DIRECTORS OF WORKS IN JESUIT SCHOOLS

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Chapter I

Statement of the Problem

In Rome, in the fall of 1540, St. Ignatius of Loyola and nine of his companions won approval from Pope Paul III to found the Society of Jesus, a Roman Catholic religious order of men. In 1548, at the invitation of the local citizenry, the nascent religious order opened their first school in Messina (O'Malley, 1993). Today, there number more than 15,000 Jesuits—as members of the Society of Jesus are now widely called—who labor in 112 countries on six continents (*The Society in Numbers: Year 2018*, 2019). They operate more than 850 schools (Jesuit Institute, 2016).

Opening a school was a departure of sorts for Ignatius and his companions. They saw themselves as heirs to the twelve Apostles, traveling widely as missionaries to bring God's consolation—both spiritual and physical—around the world. Now, they began an apostolic institute—an institutional work grounded in a specific location. This would prove consequential. Unlike the apostles who were sent in pairs to discover ways to offer consolation in various environments around the world, apostolic institutes need direction. They require stable governance.

As would be expected, the models of governance for these schools have evolved quite a bit since their start in Italian early modernity. Originally, the same Jesuits assigned by the provincial superior to be superior of the Jesuits in a community was also the director of the apostolic institutes served by that community. But, as those Jesuit works grew more complicated and required more time and specialized knowledge to govern, separate directors of works and

superiors of communities were appointed (*Guidelines for the Relationship Between the Superior and the Director of the Work*, n.d.).

Eventually, out of an increasing “conviction that God has called us to work [with laypeople] as apostles and that the results of this collaboration will be a renewal of the Church and faith,” the Jesuits affirmed that “lay people must have access to and be trained for positions of responsibility according to their qualifications and commitment” (Mesa, 2013, p. 178; Padberg, 2009 G.C. 34, d. 13, n. 13). Since that 1995 decree, lay people serving as directors of works (D.W.s) has become common. Out of the 15 independent, Jesuit-sponsored, secondary and pre-secondary schools in the Jesuits West province, 10 currently have lay directors of work (*What We Do*, n.d.).

The 35th General Congregation recognizes the importance of training these lay directors of work, affirming that “they should receive suitable formation in the distinctive dimensions of our way of proceeding, especially the integration of apostolic discernment in decision making” (Padberg, 2009, G.C. 35, d. 6, n. 20). While Jesuits receive training in discernment and socialization into ‘our way of proceeding’ in their typical 15-year period of formation, beginning with novitiate and ending with tertianship followed by their final vows, lay D.W.s do not. So, to fill a role that originated for a Jesuit, lay D.W.s must be offered appropriate formation to bridge this gap. This study is a first step in that work.

First, through a null hypothesis, it establishes that lay directors of works can indeed be formed to serve in those roles successfully. Second, it asks what specific kinds of preparation are required to serve successfully as lay directors

of works. Finally, finally, it asks how that preparation might be provided. (Cf. G.C. 35, d. 6).

Background and Need

God is increasingly calling qualified and committed lay people to be authentic apostolic partners in the mission of Jesuits. This blessing has resulted in a blossoming of lay leadership in Jesuit (and other Catholic) institutions, especially schools (Bryk, 2008; Hunt et al., 2001). “The signs of the times since the Second Vatican Council,” the Jesuits proclaimed in 1995, “shows unmistakably that the Church of the next millennium will be called the ‘Church of the Laity’” (G.C. 34, d. 13, n. 1). The universal call of baptism to be priest, prophet and king is being fulfilled more and more in the works of the church (U.S. Conference of Catholic Bishops, 2003, para. 783). This responds to Pope John Paul II’s call for laity to “take an active, conscientious, and responsible part of the mission of the church at this great moment of history” (John Paul II, 1988 n. 3). The Jesuits have sought to “respond to this grace by offering ourselves in service to the full realization of the mission of the laity” (G.C. 34, d. 13, n. 1). Part of that mission is leadership and governance in works of the church (Cf. G.C. 35, d. 6, n. 12).

It is important to note that this development comes not primarily from dwindling numbers of Jesuits that must be replaced by lay people. Rather, it is a response to God’s call of lay people to governance (Mesa, 2013). Collaboration of lay leadership in Jesuit works is not simply a means to the end of keeping the work functioning; it is a good in itself desired by God (Huang, 2012). For the Jesuits, an important aspect of responding to this call goes beyond simply

appointing qualified and committed lay people to leadership roles. It also demands sharing Jesuit formation so that those individuals can be authentic lay partners in mission (Sosa, 2019).

This formation must cover a lot. The responsibilities of a lay D.W. are vast. In addition to the obligation to care for the apostolic institute itself—which is, presumably, the primary reason a board of trustees would hire a president, the typical title given to a director of a school—D.W.s also have responsibilities to the provincial superior of the Jesuit province in which a work finds itself. They have received a mission directly from the provincial to carry out the specific mission of their apostolic institute and are asked to engage and be supported by that provincial superior (G.C. 35, d. 6, n. 12). This becomes more complex with the separate incorporation of Jesuit secondary schools where in their capacity as presidents, D.W.s also report to a lay board of trustees. They must manage the tension between the mission from the provincial and the mandate from the board (Caretti, 2013; Cody, 1980, Cons. 406f.). The D.W. also maintains a complicated relationship with the superior of the Jesuit community (*Guidelines for the Relationship Between the Superior and the Director of the Work*, n.d.). In addition, the D.W. is the person charged with animating the apostolic community that is the core of the school, a complicated notion in itself (Huang, 2012). And all of this is supposed to happen within the distinctive Jesuit way of proceeding.

What are the ‘distinctive dimensions of our way of proceeding?’ It is laid out most clearly in two places. The first is the concluding decree of the 34th General Congregation in 1995. It has the following list of “certain attitudes, val-

ues and patterns of behavior[:] Deep personal love for Jesus Christ, Contemplative in action, An apostolic body in the church, In solidarity with those most in need, Partnership with others, Called to learned ministry, Men sent, Always available for new Missions, and Ever searching for the Magis.” These are no small challenge to unpack and understand, much less put into practice.

The second model of the distinctive dimensions of our way of proceeding are the ideals personified in the job description of the general superior of the Jesuits in part IX of the Constitutions, that founding document of the Jesuits. O'Malley describes some of the more salient elements: “large-minded, courageous, compassionate, of good judgement, energetic in undertaking and in seeing tasks to completion, and, above all, ‘closely united with God our Lord and intimate with Him in prayer and all activities” (O'Malley, 1993, p. 371, Cons. 723). He adds that a Jesuit is ‘flexible, not rigid,’ ‘approachable,’ and ‘straightforward and unpretentious in style of personal life’ (O'Malley, 1993, p. 371). They should cultivate a direct and ongoing sense of God’s presence that should direct their actions and seek to lead by changing the hearts of both their charges and those to whom they minister. Finally, in the Jesuit way of proceeding, a particular process of discernment forms the core of major decision making (G.C. 35, d. 6). This refers to a technical process of prayer and discussion that leads to a better sense of God’s will for a person or apostolic institute.

Jesuits are daily socialized into this way of proceeding over their typical 20-year formation. Three of those years are given over primarily to the study and appropriation of ‘our way of proceeding’ and the balance of years serve as practice in carrying it out (Kolvenbach, 2003). Though these terms might sound general, unclear or superficial to an outsider, through this formation

process they take on an existential character whether or not they are lived out to perfection. The question as to if and how lay D.W.s can appropriate this is an important one.¹

General Congregation 36 makes this same point. “The formation of Jesuits for collaboration,” the decree entitled ‘Collaboration at the Heart of Mission’ details, “however, must be accompanied by a parallel formation of those with whom we minister, so that they might deepen their understanding of the mission they share with us” (GC 36, d. 6, n. 18). For this reason, intentional formation programs must be designed to aid in lay D.W.s’ appropriation of this way of proceeding. Without this formation, the lay D.W.s’ ability to be successful in their mission is threatened (G.C. 35, d. 6). Indeed, without shared formation, any attempt at authentic partnership in mission between lay people and Jesuits is hamstrung by a lack of shared context and understanding (Sosa, 2020). The 35th General Congregation gives some outline for the content of this formation. It “should provide professional skills, develop a special understanding of Ignatian spirituality regarding mission, and include opportunities for growth in the interior life” (G.C. 35, d. 6, n. 19). The decree goes on to explain that since lay leaders’ “challenging work is important for the mission of the Society, they need ongoing support and care from the Society and one another. Further, they should receive suitable formation in the distinctive dimensions of

¹ It seems like, from these documents, that there is little but membership in a religious congregation and prior experience that distinguishes authentic partners in mission from Jesuits. This begs an obvious question: what’s the difference? Is a successful lay leader simply a someone who attempts to become more like an ideal Jesuit? Or is there a special charism that lay people formed in ‘the distinctive way of proceeding of ours’ bring? This is an important question but lies outside of the scope of this paper.

our way of proceeding, especially the integration of apostolic discernment in decision-making” (G.C. 35, d. 6, n. 20).

Beyond the realm of the Jesuits, leaders of any Catholic school must be faith leaders. Indeed, implicit in leading any Christian institution is service as a faith leader. And what does it mean to serve as a faith leader? According to Daniels (2013), a faith leader (1) Fosters the faith development of school members, (2) Builds Christian community within the school and with stakeholders, (3) Promotes the moral and ethical formation of school members, and (4) Advances the mission of Catholic education. There is a substantial overlap between these four characteristics and the characteristics of the Jesuit way of proceeding. These can be seen as particular ways of leading within the Jesuit way of proceeding that applies within the context of schools and can be more easily measured. These the capacity to carry out these concrete responsibilities, then, is what we mean by a lay director of work properly formed to carry out their mission.

This study is a first step in the process of creating a formation program that can form lay faith leaders to direct Jesuit schools. In order to design a successful program, it must ask whether such a program is possible and then search for an effective curriculum and pedagogy. Similar research has been done on this topic, but nothing with the same focus on the Jesuit way of proceeding for secondary and pre-secondary school lay D.W.s toward the purpose of creating a formation program. Daniels writes on appropriation of faith leadership practices in secondary education administrators but neither focuses on D.W.s or the specific Jesuit way of proceeding (2013). Carey discusses the appropriation of ‘Ignatian Education’—the theoretical framework of Jesuit

schools—by lay administrators but remains focused on knowledge of principles of education rather than leadership in the Jesuit style for D.W.s (Carey, 1987). Rebores explores the formation programs for new teachers at Jesuit schools and discovers that they are successful in creating a shared Jesuit culture among faculty (Rebores, 2012). However, he does not evaluate that shared culture by the standard the Jesuit way of proceeding as outlined in the Jesuit’s foundational documents or look at programs for administrators or with reference to the characteristics of a faith leader. The most comprehensive research on the topic of lay D.W. appropriation of the Jesuit way of proceeding studies university leadership (Cole, 2013; Franco, 2016). This author’s study would be a first study of that topic focusing on the leadership formation of secondary education D.W.s in a contemporary context. Without its data, it would be difficult to construct an effective formation program for lay D.W.s to appropriate the Jesuit way of proceeding.

Purpose of the Study

The purpose of the study was to determine whether or not it is possible to form lay directors of works to serve as faith leaders in the Jesuit way of proceeding, and, if so, what formation would be needed and how it would be delivered.

As qualified lay people take over jobs that originated for Jesuits that presumed specific and shared experiences of Jesuit formation in the distinctive Jesuit way of proceeding, those lay people may take on responsibilities and tasks for which they have not been explicitly prepared in the same way. This situation can be both detrimental to the lay directors-of-works whose jobs increase in difficulty without this formation and, consequently, the apostolates

themselves. In order to discover whether lay leaders can be formed to serve successfully as faith leader in the distinctive Jesuit way of proceeding, it is important to look at how lay leaders are being formed and evaluate how successfully those programs function.

For the secondary research of this study, qualitative data from the work of two other researchers is examined. This data consists of document review, interviews, and surveys. The content of this data is then scanned for the curriculum and pedagogy of lay leadership formation mentioned. The germane data was analyzed for patterns. These patterns were then applied to answering the research questions.

The goal of this study was to evaluate if formation of lay leaders is possible, to examine what that formation should consist of and how that formation should be offered. This information could be used to design a formation program for lay D.W.s designed to meet their needs while building on the opportunities already in place. This program could close a knowledge and skill gap for lay D.W.s to help their ability to execute the missions of their apostolates more effectively.

Research Questions

The three questioned to be researched are:

- 1) Can lay directors of works be effectively formed to serve as faith leaders of schools? This presenting a null hypothesis to be disproven.

The null hypothesis as follows: the formation programs for lay leaders in Catholic institutions make no difference in their capacity as faith leaders.

- 2) What kinds of skills need to be developed for lay directors of works to succeed as faith leaders?
- 3) How can those skills that allow lay directors of works to excel as faith leaders be acquired?

Limitations of the Study

Any secondary research requires using data sets created in one context to answer questions in another context. The questions that this study considers are different from the questions presented in surveys and interviews. Therefore, the research questions presented in this study are only indirectly answered and through the interpretation of the original researcher and then this study. Second, the characteristics of what accounts for a well-formed lay leader are so broad as to defy assessment. Hopefully, narrowing the scope of this researcher to the faith leadership characteristics already well-examined in Catholic educational research will yield both measurable insights and allow this study to interact with other studies on Catholic educational leadership. Finally, the context of leadership within Jesuit institutions continues to change and develop, so the insights of this study may no longer apply to the future context of leadership of Jesuit schools.

Significance of the Study

This study is of use to all those who work in or around Jesuit apostolates, especially schools. It can provide a basic grounding in the kinds of knowledge and practices required for serving as authentic lay partners in mission. In this way, it is most important to those people, especially Jesuits, who hire and supervise D.W.s. It can give a sense of the kinds of questions that new, lay D.W.s might bring into their jobs and which might be addressed. Most

importantly, it can serve as a ground for developing a formation program for lay D.W.s, both as suggestions for curricula and a framing strategy to engage D.W.s where their interests and questions lie. It can also serve lay directors of work to both get a sense of what their peers think and wonder as well as give some introductory context to what it means to serve as a lay D.W. In a less direct way, this study is of use to those in higher education who are asking the same questions or in any lay-led apostolate.

Finally, it is of use to those who study the Jesuits as an example of the way that the Constitutions, complementary norms, general congregations, and other curial documents affect the daily practices and governance structures a specific slice of Jesuit apostolates on the ground. It is a snapshot of how ideals can become incarnate in concrete, specific realities.

Definition of Terms

- *Apostolate (or Apostolic Institute)*: A work in which Jesuits and their collaborators imitate the work of the first Apostles in the “Service of faith and promotion of Justice.” They are selected by the general superior or provincial superior and are under the care of a director of work appointed by either the general superior or provincial superior (G.C. 32, d. 4, n. 2; O’Malley, 1993, p. 66ff.; C.N. 255).
- *Board of Directors*: A board supervised by the board of members that has the responsibility to hire, evaluate, and fire the president of a school (Caretti, 2013).
- *Board of Members*: A board appointed by the provincial that has oversight powers over boards of directors (Caretti, 2013)

- *Complementary Norms (C.N.):* “The annotated Constitutions and their norms are the expression of the revised legislation particular to the Society of Jesus as a religious order in the Church.” The Constitutions are the original Ignatian foundational document of the Jesuits which have been over time changed by church law and decrees of General Congregations (see below). The complementary norms express the spirit of the Constitutions and the “appropriate way in which those Constitutions are to be lived out in the contemporary renewal of our life and our apostolates” (Padberg, 1996, p. vii). The most widely used English edition of the Constitutions and complementary norms is John Padberg’s 1996 translation and excerpts are referenced by paragraph number.
- *Constitutions (Cons.):* See *complementary norms*
- *Director of Work (D.W.):* A juridical role within an apostolate of the Society of Jesus to whom the provincial superior “habitually delegates responsibility for directing ... the apostolic work ... who is immediately dependent [to either the local superior or provincial superior] in carrying out his [sic] function, with due observance of any existing civil regulations.” The director of work “has the religious-apostolic authority, as defined in his [sic] appointment that enables him to effectively direct [Jesuits] who work with him [sic] and the institute itself to the end proposed, according to its proper Ignatian character.” In Jesuit secondary and pre-secondary schools, this role is almost always fulfilled by the president (C.N. 406-407).
- *Discernment:* A formal process of prayer and discussion by which Jesuits make major decisions regarding the missioning of Jesuits and apostolic institutes (G.C. 36, d. 2).

- *Distinctive Way of Proceeding*: see *Our Way of Proceeding*.
- *General Congregation (G.C.)*: The highest governing assembly of the Jesuits which gathers only after the death of the general superior (see below) or other serious reasons. These assemblies set policy for the whole Society of Jesus and elect a new general superior, if necessary. The policies are promulgated in decrees which are named and number. The paragraphs within these decrees are also number. For example, G.C. 32, d. 4, n. 2 refers to the second paragraph of the fourth decree of the 32nd General Congregation. Three General Congregations are of special note for this paper: the 32nd General Congregation that finished in 1975 and defined the mission of the Jesuits as the service of faith and promotion of justice, the 34th in 1995 that issued the decree “Cooperation with the Laity in Mission” which laid out a framework of lay leadership in Jesuit works, and the 35th in 2008 which developed the policy regarding lay collaboration (O’Malley, 1993, p. 52).
- *General Superior*: The highest governing officer in the Jesuits. Elected by a General Congregation, he is responsible for appointing provincial superiors who have governing authority over certain geographical areas (C.N. 719, 677, 343).
- *Jesuit*: A member of the religious order, Society of Jesus. As an adjective, refers to anything pertaining to the Society of Jesus. Today, there are around 15,000 Jesuits serving in 112 countries on six continents (Jesuit Institute, 2016; *The Society in Numbers: Year 2018*, 2019).
- *Jesuit Formation*: The initial period of a Jesuit’s time in the order. It consists of set periods of study—graduate work in philosophy, theology and per-

haps another discipline—and experiments—where a Jesuit undertakes apostolic work. This process is explicitly designed to integrate a new Jesuit into the Society of Jesus as a whole and typically takes 20 years but can vary greatly depending on circumstance. It proceeds in seven stages, more or less. The process begins with a two-year spiritual program called novitiate which includes a 30-day silent retreat and several short-term apostolic experiments. The Jesuit next studies philosophy for typically 2-3 years before advancing to regency. In this phase, the Jesuit has an apostolic mission for typically 2-3 years. This is followed by theology studies after which the Jesuit is ordained. He begins an apostolic assignment as a priest for a number of years before advancing to tertianship which repeats parts of the novitiate over the course of a single year. After that program, the Jesuit awaits final vows and full incorporation into the Society of Jesus (Kolvenbach, 2003).

- *Lay Person (laity)*: a person or people who are not clerics, i.e. people who are not priests (*Code of Canon Law - IntraText*, n.d., sec. 207).
- *Our Way of Proceeding*: St. Ignatius’s favorite way of referring to the Jesuit style of doing things. G.C. 34, d. 26, n. 1 calls these certain “attitudes, values, and patterns of behavior.” It continues with this list of characteristics: “Deep personal love for Jesus Christ, Contemplative in action, An apostolic body in the church, In solidarity with those most in need, Partnership with others, Called to learned ministry, Men sent, always available for new Missions, and Ever searching for the Magis.” Outside of this decree, this is most clearly laid out in Part IX of the Constitutions where the ‘ideal general

superior' is described. O'Malley describes some of the more salient elements: "large-minded, courageous, compassion, of good judgement, energetic in undertaking and in seeing tasks to completion, and, above all, 'closely united with God our Lord and intimate with Him in prayer and all activities.'" (O'Malley, 1993, p. 371, Cons. 723). He adds to this that a Jesuit is 'flexible, not rigid', 'approachable', and 'straightforward and unpretentious in style of personal life' (O'Malley, 1993, p. 371). They should cultivate a direct and ongoing sense of God's presence that should direct their actions, seek to change the hearts of those to whom they minister and seek to aid souls as much as possible. They were to be 'apostolic' in imitating the first followers of Jesus and trust that God is acting directly upon each creature and all creation (O'Malley, 1993). Finally, as G.C. 35, d. 6, discernment is at the heart of this way of proceeding. These attitudes and dispositions of the heart are not abstract but issue forth in the choice and execution of daily activities. In the context of leadership, they affect how collaboration takes place and, especially, how decisions are made.

- *Province*: A geographically-based administrative region of the Jesuits to which certain Jesuits and apostolic institutes belong. These Jesuits and works are under the governance of a provincial superior (C.N. 187ff.).
- *Provincial Superior*: Appointed by the general superior, he is the governing officer of a geographical region in the Jesuits, called a province. His authority over those Jesuits is broad and his responsibilities include missioning the Jesuits of that area to different apostolates, choosing the apostolates of the province and appointing the directors of work for those apostolates (C.N. 343, 255, 258, 406-407).

- *Society of Jesus*: A Roman Catholic religious order founded in 1540 by St. Ignatius of Loyola and his first companions. Metts explains that “The first members of the Society placed themselves at the service of the Pope and engaged primarily in spiritual ministry. Gradually the Society became involved in education with the first Jesuit school founded at Messina in 1548.” Now, they operate a network of around 850 schools across the world (Jesuit Institute, 2016; Metts, 1995, p. 125).

Chapter II

Review of the Literature

The purpose of the study was to determine whether or not it is possible to form lay directors of works to serve as faith leaders in the Jesuit way of proceeding, and, if so, what formation would be needed and how it would be delivered.

This literature review will cover three themes of this study:

1. The distinctive Jesuit way of proceeding,
2. Lay leadership of Catholic secondary and pre-secondary schools, and
3. Development of lay leaders as authentic partners in mission

The first section will explore the content of the Jesuit way of proceeding, especially as it has been incarnated in leaders and institution. The second section will include a brief history of lay leadership in Catholic schools and the attributes of successful lay leaders. The final section will examine research on programs that form lay leaders to be authentic partners in mission.

Review of the Literature

The distinctive Jesuit way of proceeding. The phrase ‘distinctive Jesuit way of proceeding’ can seem devoid of any content. This is problematic because ambiguity here can prevent any imagining of what a successful director of a Jesuit work looks like. John O’Malley (1993), in his landmark study of the documentary history of the early Jesuits, explains that this phrase originates with Ignatius of Loyola, the founder of the Jesuits, himself. It resists definition because it simply refers to the “spontaneous and actualized ideals and attitudes that distinguished Jesuit life and ministry from that of others” (O’Malley, 1993, p. 8). While this description gives some idea of the role of the distinctive Jesuit

way of proceeding and where it might be found, it sets no concrete or descriptive boundaries as to what aspects it might contain. O'Malley continues to explain how Jesuits communicated the content of the distinctive Jesuit way of proceeding among themselves. This came in the form of circular letters to all Jesuits in which was summarized the more important activities of the Jesuits around the world. These were communicated in "concrete details about what Jesuits were doing, how they were received, how they dealt with the problems they faced" (O'Malley, 1993, p. 10).

In the end, it seems that the Jesuit way of proceeding simply refers to the way Jesuits do things in a given time. It is expressed primarily through storytelling and ought to inform daily decision making. It is a style that manifests the character of and deepest values and sensibilities of the organization. Less important are the concrete, superficial practices than the internal life of a person and how that drives action, thoughts, and feelings. This approach—focusing on the nuances of a biography to find the content of the Jesuit way of proceeding—is confirmed by others (Worcester et al., 2017).

Helpfully, there is a relatively contemporary source that articulates the current core of the Jesuit way of proceeding. Schneller (2006) summarizes this by applying principles laid out by a recent general congregation of the Jesuits to the biographies of exemplary Jesuits. He lays the eight way out: a) deep personal love for Jesus Christ b) contemplatives in action c) an apostolic body in the Church d) in solidarity with those most in need e) partnership with others f) called to learned ministry g) men sent, always available for new missions h) ever searching for the more, the magis. He proceeds through the biographies of three Jesuit exemplars—Peter Favre, Francis Xavier, and Ignatius of Loyola.

For Ignatius, deep personal love of Christ manifested in his “reverent familiarity with Jesus” in prayer (Schineller, 2006, p. 4). This includes mystical visions of nearness to Jesus, the audacity to name a religious order after Jesus and three core questions used for self-evaluation before Jesus on the cross: what have I done for Christ? What am I doing for Christ? What ought I to do for Christ? The next characteristic of the Jesuit way of proceeding, ‘contemplatives in action,’ is seen in the way Ignatius’s mind could be brought to God by the smallest thing, including as an early companion charmingly put it, from “consideration of a little worm” (Schineller, 2006, p. 7). This characteristic also extended to seeing the whole daily life as serving God, not just times in daily prayer.

‘An apostolic body in the church,’ the next characteristic, requires a ‘union of minds and hearts’ among Jesuits to the general superior. The fourth characteristic, ‘in solidarity with those most in need,’ is revealed in how the well-educated Jesuits who had access to royal courts and wealthy households founded their first apostolic institute as a home for prostitutes. ‘Partnership with others’ is seen in the way that first Jesuit work was administered –after its founding, it was handed off to a noble group of women who would run it. The mission of a Jesuit work ought to be carried out by those most suited to do so, Jesuit or not. So, responding to the needs of the poor and doing that with whomever might labor for the same cause form this part of the Jesuit way of proceeding.

‘Called to learned ministry,’ the sixth characteristic, could be seen in an admonition that Ignatius offered young Jesuits. He told them that completing academic work is as necessary as growing in brotherly love, at least in terms of how they might become effective co-workers with Christ. Jesuits should be

properly prepared for the works of love that they undertake. The next characteristic, 'Men sent, always available for new missions' is at the core of Jesuit work. It means that each Jesuit work ought to be flexible so as to nimbly respond to the evolving needs and changing persons who, in the words of an early Jesuit, "are either totally neglected or inadequately attended to" (Schineller, 2006, p. 13). In the last characteristic, 'ever searching for the Magis,' is exemplified in one of Ignatius's most common prayers to God. He begged God to be sent to serve the greater need with greater fruit.

So, perhaps a starting place for understanding the distinctive Jesuit way of proceeding is being grounded in personal relationship with God; collaborative with others in heart, mind, and work; flexible and committed to responding to the greatest need; and ever seeking better training and means of responding to that need.

Cura Personalis. Another common phrase in Jesuit patois is 'cura personalis.' This refers to the personal care offered to those who labor in Jesuit works (Dreher, 2012; Geger, 2014; McGinn, 2015). When administering a Jesuit work, the director cares not only for the mission of the work, but also for the people executing that mission. The meaning of this term is nuanced. Oftentimes it is employed to explain how Jesuit education looks to form the whole student. However, this meaning is not found in its original sense. 'Cura Personalis' in a Jesuit context appeared for the first time in a 1951 letter from the general superior to the provincial superiors. In the letter, the provincials were exhorted to take into account the personal needs of Jesuits and not just the missions of institutions when deciding where to assign them (McGinn, 2015).

Contemporarily, this means that Jesuits have an obligation to care for lay directors of works on a personal level. Dreher (2012) explains what this might consist of. She documents how the Jesuit Santa Clara University offers speakers, support groups, and counselors to aid employees with work-life balance. They have further put policies in place to consider the changes in workload to employees when making decisions.

Geger (2014) turns to early texts of the Jesuits to have a better sense of what *cura personalis* is and why it is important. He sees this term referring to the importance of setting Jesuits up for success in their jobs long-term and thus avoid burnout, exhaustion, shame, lost confidence, or vocational doubts as a consequence of failure or overwork. This is concretely expressed in being mindful of the health and energy levels of employees in order to safeguard it. For example, Ignatius suggested that each community have access to a modest residence outside of the city where Jesuits could find quiet and rest. Ignatius summarizes the importance of '*cura personalis*' like this: "If a horse is exhausted in the early stages of a trip, it usually does not complete the journey; instead it ends up making others have to care for it" (Geger, 2014, p. 11). Just as Jesuits receive in their formation, part of the formation of lay directors of works is support in completing their jobs in the long term.

Jesuit prayer. Two forms of prayer particular to the Jesuits bear special consideration. The first are the Spiritual Exercises of St. Ignatius. These exercises refer to different methods of praying over various themes and topics. Just as weightlifting and swimming are kinds of physical exercise, the prayers suggested by St. Ignatius are spiritual exercises. And just as each kind of exercise improves the health of the body in a certain way, each spiritual exercise

strengthens the soul in certain ways. According to George Ganss, S.J. the Spiritual Exercises of St. Ignatius originate from a moment in his own prayer (1969). It took the form of psychologically intense love-experience of God that changed his heart to orient him toward service of God and God's people. Part of this spiritual experience was a desire to share these spiritual experiences with others. He eventually developed a series of contemplations to be given to retreatants in solitude for thirty days. They primarily, though not exclusively, consist of imaginative exercises, oftentimes with scripture, especially of the life of Jesus.

George Ganss explains how they work:

There is a sequence of themes which puts before the exercitant the whole history of salvation: God's communication of Himself, [humanity's] response of sin, God's new communication of Himself in Christ all arranged to stimulate the retreatant to make his personal response of love which will prove itself by deeds. There is a logical sequence of topics which is well calculated to produce a strong psychological impact of total commitment to God. This sequence is a march through conversion toward surrender to God through generous love, a whole series of stirring experiences for the exercitant. The Exercises are a school of prayer. In their entirety, they are addressed only to willing or eager exercitants, whom they stimulate to open themselves to the Holy Spirit's advances; to seek God's will and carry it out with vigor; to come to big decisions like the choice of a state of life without being moved by disordered affections; to desire to know, love, and follow Christ, come pleasure come pain, without being moved by disordered attachments, and to cooperate with Him in achieving His redemptive plan; to carry on by one's own inner energies in cooperation with God's grace. (1969, p. 6 f.)

They consist in a director personally guiding a retreatant who desires to make these exercises (Ganss, S.J., 1969, p. 10). The twin roles of a director are to both give exercises for the retreatant to accomplish and to aid the retreatant in discerning where and how God is acting during the retreat. Or, as Ganss puts it, the director's is to "stimulate the [retreatant's] desires, moderate [the re-

treatant's] progress and speed through the sequence of topics, ask how the contemplations were succeeding, and be available for counseling and help in discerning the spirits" (1969, p. 11). One might imagine a coach giving drills to a tennis player according to the tennis player's needs. This includes examining how the player responds to different drills and focusing future drills on those experiences.

People come to the Spiritual Exercises for many reasons. The person might be a Jesuit in his early formation or a lay person seeking to prepare a confession. Some might aim for general spiritual progress or learning new ways to pray, others for seeking spiritual direction or growth in virtue (Ganss, S.J., 1969, p. 12). While the original Spiritual Exercises were given over 30 days of silence, from the beginning, in cases when there it was important that a person develop spirituality but that person had obligations that prevented the person from thirty days leave, they could spend an hour and one half a day in prayer and complete the full Spiritual Exercises. This form of giving the Exercises – referred to as the '19th annotation' (after the note Ignatius made explaining this method) or the Spiritual Exercises in Everyday Life (SEEL), is commonly given to lay people in leadership at Jesuit institutions (Carroll, S.J., 1990).

One particular Spiritual Exercise merits additional consideration. It is the Examen. According to the guru of the contemporary Examen, George Aschenbrenner, the Examen is a "daily intensive exercise of discernment in a person's life" (1972, p. 14). The Examen presupposes that "welling up in the consciousness and experience of each of us are two spontaneities, one good and for God, another evil and not for God" (1972, p. 14). The goal of the prayer is to

learn what the good spontaneity feels like when it arises. Through daily practice, one grows in sensitivity to the “unique, intimately special ways that the Lord’s Spirit has of approaching and calling us” (1972, p. 14). With this sensitivity, one is more ready to respond to the invitations of God. Growing in this sensitivity is, of course, a skill that takes a good deal of practice.

The prayer proceeds in five steps. The first step is remembering that each of us is created by God and that everything and every moment in our lives is a gift from God. The second step asks God to make the person’s heart sensitive to God’s movements throughout the course of the day. In the third step, the person contemplates the events of the day asking, “what has been happening in us, how has God been working in us, and what the God has been asking us” (1972, p. 18). Daily repetition of this practice builds perceptual habits of noticing and responding to God’s invitation. Fourth, the person expresses contrition for inadequate responses to the invitations of God. This should flow naturally from the third step rather than proceed as some act of self-flagellation at poor self-image. Finally, the person makes a resolution for the future grounded in desire and hope.

From this examination, it seems that there is a distinct Jesuit way of proceeding, and its presence might be evaluated through certain clear if broad criteria. Further, there exists a comprehensive tradition of personal care for those who labor in Jesuit works which might also be successfully evaluated. Finally, there are particular modes of prayer that animate the Jesuit way of proceeding.

Lay leadership of Catholic secondary and pre-secondary schools.

Lay leadership of Catholic schools has taken off following the Second Vatican

Council (1962-1965). This is alternately seen as a response to declining numbers of priests and religious who used to lead schools or an increase in God calling lay people to leadership ministry in the church (Bryk, 2008; Heft, 2011, G.C. 34 d. 13 n. 1; Hunt et al., 2001). In 2011, two-thirds of school leaders across the country were lay people, which is a number that matches the leadership makeup of Jesuit secondary and pre-secondary schools in Jesuits West (Heft, 2011).

What makes a successful lay director of work? Rentner's (2010) study looks closely at the transition from religious leadership to lay leadership at schools sponsored by the Holy Cross order. His research questions concern the difference between lay and religious in enacting the distinctive Holy Cross way of proceeding and what factors contribute to the successful incarnation of that charism in a school. This was done with 90 individuals participating in various interviews and focus groups, as well as digital images of campus visits, collected archival materials at the schools and a questionnaire offered to all participants. The interviews and focus groups produced stories which were coded by etic codes from preexisting literature and then recoded based on emic codes that emerged from the etic coding and from the photos and archival materials. These codes were validated by multiple readers and compared across multiple school sites. Data that triangulated were then considered for interpretation and developing conclusions.

Results indicated that current lay leaders perform as well as Holy Cross brothers in "maintaining a strong commitment to the Holy Cross traditions and values found within these schools" (Rentner, 2010, p. 245). The most important leader characteristics that contributed to this success were personal zeal and

commitment to the values and mission of the Holy Cross brothers. This zeal and focus on charism may have been passed on through that province-level programming, retreats, and literature may be models of formation—especially in as much as they facilitate relationships among lay directors of works to connect and support one another. Finally, the study concluded by noting how a change from religious to lay leadership may actually be part of a change in the Holy Cross way of proceeding entirely. It may be that the charism must be re-developed as much as simply passed on.

This study is limited by researcher bias as the principal investigator is a member of the Holy Cross order and moderately familiar with the research sites prior to conducting the research. Further, he has a vested interest in the continuing success of these schools. Additionally, owing to the depths of the data collected, only four sites could be studied. It is hoped that the quantity and depth of the data at each site is sufficient to make generalizable claims from only four sites. Also, because the interviews and focus groups were conducted by a researcher who has a public, vested interest in the results of the study, participants might censor or alter their statements. And beyond that, their statements—which are the participants' self-reported perceptions—are conditioned by the biases of the participants.

This study reflects how there can be identifiable traits in lay leaders that lead to success in mission through a particular way of proceeding. It also models a method to discover those characteristics. However, it can only speculate at the precise vectors by which lay leaders acquired and refined these characteristics. Still, it offers possibilities for channels through which formation might have happened.

The role of faith leadership. Franco (2016) examines the interior life of some exemplary leaders at a successful Catholic, Marianist University. His goal is to understand the lived experience of successful lay leaders to understand what characteristics they might share. This is done by generating ‘portraits-in-words’ of eight individual leaders through in-depth interviews, assessing those portraits collectively to create three themes within the lived experience of those leaders and from those construct a brief ‘statement of essence’ which contains meanings that remain consistent across the eight leaders in the study. The possible participants in the study were identified by their prior reception of mission-based awards, their membership in the Marianist order, or their training in mission through a special program. The final eight participants were selected by their (1) peers through voluntary nomination and public recognition, (2) whether they consider themselves a well-trained leader, and (3) whether they were willing to sit for extensive interviewing. The interviews were long and open ended looking to evoke a comprehensive description of the interviewee rather than find an answer to a set of questions.

Twelve essential characteristics emerged. Exemplary lay leaders are a) authentically committed to embodying values in dialogue with others b) accepting of a personal responsibility of service to the mission and creating buy-in from others c) connecting broadly with people across the organization d) learning about the history and traditions of the organization e) integrating the charisma, academic responsibilities, personal interactions and day to day work f) practicing intentional embodiment of the charisma in every interaction g) emanating warmth, respect and joy h) striving to become better at these characteristics i) witnessing the mission as an example, voice, and mentor j) nurturing

commitment to mission in others k) persevering through the cost of this leadership and l) growing in ability to live in tension, accept failure and see the charisma as a gift for the whole world.

These results are limited by their very narrow contexts—a particular kind of recognized leader at a particular university with a particular charisma. The study is focused on developing further practice in that context rather than producing generalizable conclusions. And the context of that study differs sizably from that of a secondary or pre-secondary director of work, so perhaps the specific contours of successful leadership differ. However, it is helpful in clarifying that successful leadership is based not only on knowledge and skills, but on a total embodiment of a charisma reflected in interactions with others.

Beale (2013) looks closely at what makes Generation X school leaders successful. She sought to find whether the religious background and spiritual formation of these Catholic school leaders is sufficient for their success as well as come to understand the principals' self-understanding of their development and sustainment of the Catholic identity of the school. She offered a survey to 33 potential interview subjects in the greater New York area and selected six for further interviews as well as site case-studies which included informal conversations and photographs from the specific school site. Through triangulation, these data were used to develop conclusions about the status of lay Catholic school leaders.

The study concluded that Generation X Catholic school leaders saw Catholic identity as living out through words and actions the Catholic faith. As such, Catholic identity resides within each person at the school and is visible in interactions. As leaders, then, Catholic identity is inextricably a part of their

whole being. Yet beyond this palpable commitment to Catholic identity, the leadership styles of the leaders in the study diverged considerably. Catholic identity remains central to these leaders even though none of the six leaders in this study have formal religious formation beyond secondary school. Yet all have a strong commitment to spirituality and faith. All the leaders sought out additional training in the faith and foundations of Catholic education and wished that this training was more available. Finally, these educators all came from stable two-parent families and attended Catholic school. From these findings, the researcher recommends developing additional professional development activities including formalized leadership trainings and retreats.

This study is limited by its narrow focus. It looks at younger leaders in a specific geographical region. This, coupled with the small sample sizes, threatens the generalizability of the conclusions. Further, researcher bias is an issue. The researcher is herself a Generation X school leader. Still, the study illuminates the experiences of lay leaders in Catholic works and their desire for continuing formation.

Belmonte and Cranston (2009) concur with Beale. They studied Australian Catholic school lay leaders in order to find what leads to successful leadership outcomes. They asked how lay principals perceive their role as carrying the mission of Catholic schools, how they promote and make explicit their schools' Catholic character and culture to others, what tensions they experience in this realm, and how they perceive the appropriateness of their preparation. The researchers proceeded by case study, interviewing principals, taking notes and journaling during fieldwork, directly observing their participants in action and

analyzing documents developed or endorsed by their subjects. The conclusions were triangulated through member checks and further data analysis.

They found that the first way that lay leaders provided faith leadership was as gatekeepers, selecting the students and faculty and staff on campus. They also choose the particular cultural issues on which to concentrate. Second, they promote a network of interpersonal relationships among those in the school community. Third, they ensured the quality of religious instruction. Most importantly, they led the school by modeling the personality and disposition that transmitted the values, attitudes, philosophies, and norms of the school. The principals found their primary formation for this role happened in childhood where they were imbued with the Catholic faith and its traditions. These experiences were reinforced by their own family and Catholic educational experiences. Principals also drew from experiences of members of religious orders with whom they worked to prepare themselves for faith leadership roles.

The breadth of this study – essentially documenting any contact between the Catholic character of a school and the role of the principal -- perhaps creates much in the way of information, data points, and conclusions. However, the small sample size of six subjects and the peculiar Australian context of rural New South Wales, Australia, hamper the generalizability of the vast number of inferences and intuitions surfaced by this work. However, it is helpful to note that it is primarily life experience and encounters with members of religious orders that formed principals to serve as faith leaders.

This research shows that lay leaders, in as much as they embody the characteristic way of proceeding of the religious organization, can be just as effective as their colleagues who are members of religious orders. It also suggests

that there are specific kinds of formation that help leaders achieve success.

This is the topic of the final section of this literature review.

Development of lay leaders to be authentic partners in mission. How are exemplary lay leaders formed to embody these traits? Rieckhoff (2014) collected data surrounding a principal training program to show how faith leadership can be developed and how that allows leaders to be successful across leadership categories. She sought to understand the particular difficulties of being a novice principal, how the faith-leader aspect of the role plays out, and how the Catholic mission affects decision making. She did this by surveying and interviewing participants in a “Catholic School Principal Support Program,” a ten-month long mentorship program of first- and second-year Catholic school leaders in a large, urban diocese.

Unsurprisingly, a ten-month long program of one-to-one mentorship did not affect the principals’ self-perception of their preparedness for the role very much. But, the survey data was revealing. Faith leadership and developing faith leadership in others – an important role as a principal – proved a different kind of skill than other leadership skills. First, developing the faith leadership of employees solely through workplace activities and experiences proved difficult. Being a faith leader is a deeply personal attribute that requires deeply personal means to cultivate. Accordingly, principals claimed that their most important training to be faith leaders came from daily prayer, Mass attendance, reception of Sacraments and participation in parish social ministries. Rieckhoff also found that principals who reported success in faith leadership saw faith leadership as their primary duty and all other responsibilities as subordinate. Unlike those other domains of responsibilities where skills can be acquired or

expertise can be sought –enrollment, marketing, or instructional leadership – faith leadership requires pre-existing attitudes and practices that cannot be developed on the job. This suggests a clear need for a long-term personal leadership training pathway aimed at preparing aspiring principals to be faith leaders.

This survey is limited by both size and context. The schools studied averaged more than 90% Catholic. This does not align with the reality of Jesuit schools in the West. Further, there were only 10 subjects, and so generalizability is hampered through the small sample size. Still, this study is important in its suggestion that faith development functions differently than other skill development: it is more personal, attitudinal, and practical – things that cannot be developed through short-term training alone.

Kline-Kator (2016) studies how a particular religious way of proceeding is passed on. She asks how a particular charism – that of the Sisters of Mercy – is passed on to staff members of Mercy secondary schools in the United States, with a particular focus on professional development, including induction programming for new staff members and proposes a model of professional development in order to convey and reinforce the Mercy identity. The researcher emailed faculty and staff at ten different Mercy secondary schools a survey with quantitative and qualitative questions regarding these topics.

One learning from the study was how incredibly varied both the format and content of charism-focused professional development was at different schools. Some schools focused on the biography of the founder while others looked at the history of the Mercy sisters' schools. Some had lectures and information presentation while others had small group discussions and self-eval-

uations. Out of all of these, it seems that day-long retreats focused on understanding the charism coupled with ongoing experiences for prayer and self-reflection were most effective. It's also clear that different staff members take away different things from the same experiences. Because of this, effective formation needs to be personalized to ensure that the proper take-aways are established.

The study is limited by its method. There is only so much depth that can be gleaned from two surveys distributed over e-mail. A tremendously varying response rate suggests that certain characteristics in some people are more likely to respond to this survey than others, so the sample is not representative. Finally, since the terms of this study are so specific, its generalizability is questionable – more suggestive than predictive. All that said, there is evidence that the Mercy charism lives on in at least some way at each Mercy school though ensuring that requires a substantial amount of time and resources.

Cole (2013) looks specifically at how lay leadership is developed on Jesuit university campuses. He looked closely at programs that formed lay leaders in mission and identity on Jesuit campuses, trying to ascertain the perceived influence of each program and how differences in program design led to differences in outcomes. To do so, he conducted 34 in-person interviews across three Jesuit university campuses.

From those interviews and analysis, he discovered six themes about mission transmission:

1. Invitation and hospitality are key to mission and identity involvement.
2. Mission and identity programs build connection, community, and culture.
3. Mission and identity participation builds confidence in understanding the Jesuit, Catholic context and provides new language.
4. Mission and identity programs build reflective practices in participants, and in some spirituality.

5. Some participants report “living in the tension” between Jesuit and Catholic contexts. 6. Mission and identity programs impact leadership development in participants. (Cole, 2013, p. 171)

He also discovered that rather than developing leadership capabilities, mission and identity programming served to create a common language that builds a sense of community on campus. These programs also served as a ‘gateway drug’ to deepening involvement in leadership. The programs also have value in building reflective practices and jumpstarting spirituality. Because of this, inviting broad participation in these programs and focusing on their spirituality and depth holds the greatest promise for mission transmission. The most effective programs proved to be two year cohorted programs, focusing on the Jesuit context in year one and making some version of the Spiritual Exercises in year two with an additional international immersion experience.

Though this study is remarkable for its sampling of subjects across three very different Jesuit universities and across different institutional roles, no study could track the experiences of all participants in mission formation programs. Also, hourly staff proved difficult to interview because of their work schedules, so the study leans heavily toward the experiences of salaried administrators who participated in the programs. Further, participants in the study were suggested by mission and identity officers at the schools, so there is a possibility of selection bias. All that said, the study is important for suggesting a particular kind of program that has proven effective across relatively diverse contexts.

Daniels (2013) studied factors that prepared principals and presidents for their role as faith leaders, a core feature of a successful director of a Catholic institute. Through survey research and telephone interviews, he asked

Catholic secondary school presidents and principals how they see themselves exercising faith leadership. He also asked what influences their faith leadership and what and how their formation contributed or did not contribute to their faith leadership.

He found that seven factors most prepared people for their roles as faith leader:

a) experience as Catholic school students, (b) experience as Catholic school teachers, (c) participation in Religious order sponsored activities, (d) participation in school formation activities, (e) participation in Catholic educational degree programs, (f) their relationships with a faith leader or mentor, and (g) Catholic family background. (Daniels, 2013, pp. 105–106).

Like most studies on Catholic school leadership, the sheer particularities of a given circumstance in addition to the small sample size limit the generalizability of the study. However, by suggesting that faith leadership ability grows over time, through practice of the faith rather than explicit training, Daniels draws the focus on faith leadership development away from short-term programming and toward longer-term, experiential formation and the importance of the cultural and religious capital that leaders bring with them into their roles.

Finally, Durow and Brock (2004) look at some factors that lead to the retention and attrition of Catholic school principals which may shed light on kinds of personal care that ought to be offered to lay directors of works. They selected 25 principals in a Midwestern Catholic diocese who had left principal jobs in the past year to complete a survey and participate in an interview.

The findings in the study were clear and consistent: principals left their jobs not because they disliked being principal or were undercompensated. Rather, they left because of three reasons. First, they left because of changing

personal needs, including geographical location, need for a flexibility of schedule or relocation for family needs, and avoiding burnout. Second, they left in order to pursue career advancement, moving into roles with more responsibilities and better prospects, e.g. archdiocesan administrator, Catholic school president, or university professor. Finally, they left because of conflict in governance, including changes in a school's mission and vision especially involving autocratic priests. This third cause of attrition invites solutions, especially by ensuring that a priest, school president, or board of trustees does not intervene in the daily operation of the school. Further, explicit training must be offered to both priests and lay school administrators to aid in positive working relationships.

Again, while the results of the study are illuminating, the sample size is too small to be generalizable. The results are more suggestive than definitive. But it is very helpful to note that special care must be taken to avoid conflicts in governance that come from overlapping and mismatched understandings of responsibility and authority.

All in all, faith leadership formation can improve all aspects of a person's leadership capacity. Varied programs to support this already exist, though the most effective formation happens either earlier in the life of the leader or through programs designed specifically to provide experiences of encounter, reflection, and prayer over an extended period of time. Finally, support and care received from employers is important in the success of lay Catholic school leaders.

Summary

From this review, there is specific content to the Jesuit way of proceeding, even if it is imprecise and only known biographically. Through this, the Jesuit character of a leader might still be provisionally evaluated. Second, there is a long tradition of ‘cura personalis’ or caring for the individual needs of a person working in a Jesuit apostolate which certainly applies to current lay directors of works. There is also a particular spiritual practice that aligns with the Jesuit way of proceeding.

It is also clear that lay people are increasingly in leadership in Catholic schools, and that these leaders are just as effective as religious leaders. This effectiveness is conditioned by the leaders’ personal appropriation and embodiment of the way of proceeding of a certain religious order. Finally, there are multiple, budding formation programs that look to aid leaders and all workers at Catholic schools in that process of appropriation and embodiment. Still, the most effective formation happens biographically—through formative experiences in the leader’s life and persistent experiences working in Catholic education. The exception to this are structured, cohorted programs aimed at shaping the heart of the leader through encounter, reflection, and action and some form of spiritual retreat. This current study should complement this prior research by looking at precisely what leaders need to be formed in to be successful and how that formation occurs.

Chapter III

Methodology

As the number of Jesuits decreases, more and more Jesuit schools are headed by lay directors of works. These leaders take on roles that were designed to be filled by men who are members of the religious order of the Society of Jesus and who are priests. The leader of any Catholic institution is by definition a faith leader, and faith leadership is especially a core feature of the leader of any Catholic school. While Jesuit priests have had many years of training to be faith leaders from their seminary training, their experience of the Spiritual Exercises of St. Ignatius, and years of daily spiritual practice, oftentimes lay leaders come into this role with less preparation and experience. The goal of this study is to examine how those lay leaders can be formed to thrive in this faith leadership role.

The research questions are:

- 1) Can lay directors of works be effectively formed to serve as faith leaders of schools?
- 2) What kinds of skills need to be developed for lay directors of works to succeed as faith leaders?
- 3) How can those skills that allow lay directors of works to excel as faith leaders be acquired?

To answer these questions, a secondary research approach was taken. Studies were sought that responded to those questions with sample sets as broad as possible.

Research Methodology

This research will use data from two previously completed studies that also took as their starting point the increase of lay leadership owing to a decline in the number of members of religious orders. These two studies focused on the competencies required to serve as faith leaders of schools or as stewards of the Jesuit mission within an institution. They also examined the experiences that were effective at preparing leaders to fulfill both those roles. Further, these studies had significantly larger sample sizes than other available data sets which allows these studies to be more generalizable beyond a single specific context. Finally, this research approached the reality of increasing lay leadership not as a regretful problem to be solved but as a natural and hopeful development of 21st century Catholic schools in the United States.

The first study is titled “Answer the Call: An Examination of the Development of Lay Leadership on Jesuit, Catholic University Campuses” from 2013 by Xavier Alexander Cole. His research took as its starting point the declining numbers of Jesuits and increasing numbers of lay people charged with carrying on the mission of the Jesuits. From there, it looked to programs that exist to form lay leaders to carry on that mission. And, of those programs, the study asked two questions: ‘What is the influence of these programs on their participants?’ and ‘What are the design and expected outcomes of those programs?’ His first question yields data that allows the first research question of this study to be answered: ‘Can these programs work?’ His second question matches the second and third research questions of this study: ‘What the necessary skills are to serve the Jesuit mission as a director of work? and ‘How are those skills passed on?’

The second study is titled “Perceptions of the Catholic Secondary School Presidents and Principals of Six Dioceses in Northern California Regarding Their Faith Leadership Practices and Preparation” from 2013 by Michael Daniels. He takes as his starting place the need for Catholic school leaders to serve as faith leaders. His research questions pertain to how presidents and principals at Catholic schools exercise their faith leadership, what factors influence their faith leadership and to what degree, and what preparedness for this role as faith leaders do they perceive themselves as having. Through Daniel’s research, the three research questions of this study can be answered: whether or not lay leaders can be prepared to serve as faith leaders, what skills are required for faith leadership and how those skills are acquired.

Research Setting/Participants

In Cole 2013, data were collected through semi-structured interviews and document analysis. The participants were employees of Jesuit colleges and universities who had participated in an extended lay person formation program with a focus on Jesuit, Catholic mission and identity within the last two years. They were selected from three Jesuit universities. In Daniels 2013, data were collected through surveys and telephone interviews. The participants were 41 of the presidents and principals of Catholic secondary schools in Northern California.

Data Collection/Data Analysis

In Cole 2013, semi-structured interviews and document analysis created a data set that could be analyzed for patterns of meaningful themes. After interviews, the researcher recorded thoughts and ideas about emerging themes. Interviews were then transcribed and checked for accuracy. The data was then

analyzed through the block and file method to more than 130 codes grouped to develop 13 broader themes. Commonalities of participant responses with regard to each theme form the basis for the analysis. Reliability was ensured by a consistent interview protocol with questions based upon documents produced by the mission and identity programs themselves. Validity was assured by connecting the analysis to contemporary writings of the Society of Jesus that set expectations regarding formation for mission and identity.

The commonalities between the responses to certain themes respond to the research questions of this study. Commonalities in the themes of “participation in mission and identity impacts understanding Jesuit, Catholic context,” “participation in mission and identity impacts leadership capacity,” “participation in mission and identity impacts spiritual development,” “competency as a lay person for mission and identity,” “challenges of mission and identity work,” and “training still needed for mission and identity work” respond to the three research questions of: 1) Can lay directors of works be effectively formed to serve as faith leaders of schools? 2) What kinds of skills need to be developed for lay directors of works to succeed as faith leaders? 3) How can those skills that allow lay directors of works to excel as faith leaders be acquired?

In Daniels 2013, an online survey was developed by the researcher. It asked questions relating to the roles, responsibilities, and competencies of faith leadership. The questions included forced choice responses, write-in comments and Likert scale responses. The forced choice responses allowed for standardized measurement of the self-perceptions of faith leadership practices and preparedness while the Likert scale responses allowed for the relative degree of

influence of certain factors on faith leadership to be compared. Comments allowed additional data to be collected. This survey was then validated by a panel of 10 experts. A test-retest reliability method was used to check for internal consistency and reliability of the instrument. Followup telephone interviews of 30 minutes were conducted a sample of participants afterwards. These interviews were transcribed, verified, and analyzed for common themes and unique insights.

Data collected in the survey instrument was considered in total, disaggregated by role of subject (president or principal), and disaggregated by type of school governance (religious order v. diocesan v. independent). The data regarding how faith leadership is exercised and how prepared participants were to be faith leaders were analyzed by percentage of frequency of response in the forced choice questions. Data collected regarding the factors that affect faith leadership and the degree of influence each of those factors has were analyzed both by mean and by relative percentages. All data were then cross-referenced with the experience each participant had with Catholic education and analyzed relative to the study's demographic variables: gender, lifestyle, age range, race/ethnicity, religious association, and educational background.

Data from this survey will help answer the research questions of this study in the following ways. The rankings of the degree of influence each factor has on faith leadership will show whether or not formation programs proved influential in forming faith leaders. This answers this study's first research question of "Is formation in faith leadership in lay leaders possible?" Further, mean scores of the levels of preparedness of school leaders possessed will demonstrate whether or not lay leaders can be prepared to serve as faith leaders.

These mean scores will also show what aspects of faith leadership that principals and presidents feel unprepared for. This will indicate what formation needs exist and what lay formation programs should seek as outcomes., answering the second second research question of this study. Qualitative responses can answer the third research question of this study by explaining on how such preparation can take place.

Chapter IV

Results

The goal of this study is to examine how those lay leaders can be formed to thrive in this faith leadership role. It approaches this goal from three angles: (a) whether or not that formation is possible, (b) what particular skills prepare lay leaders to thrive in their roles, and (c) how do lay leaders develop those skills. To answer those questions, a secondary research approach was taken. Two studies about the formation of lay leaders of religious schools were selected. These were “Answer the Call: An Examination of the Development of Lay Leadership on Jesuit, Catholic University Campuses” from 2013 by Xavier Alexander Cole and titled “Perceptions of the Catholic Secondary School Presidents and Principals of Six Dioceses in Northern California Regarding Their Faith Leadership Practices and Preparation” from 2013 by Michael Daniels. An analysis of the data from these two studies revealed findings within the areas of the research questions. The applicable findings are grouped by research question below.

Summary of this Study’s Findings for Research Question 1

Research question one of this study asked, “Can lay directors of works be effectively formed to serve as faith leaders of schools?” Evidence from both studies indicates they can. Most simply, Cole shows that lay leaders are able to learn and appropriate the history and philosophy of the Jesuits. As one of his subjects said in an interview:

“I remember thinking that [this formation program] was going to be an opportunity for me to learn more about the history of the Jesuits and more about the Jesuit philosophy. And so for me, because I didn’t know a lot, it was a welcome opportunity to do so through conversations about how you actualize it [mission] here on the campus” (2013, p. 92)

Not only did this person actually learn about the life of St. Ignatius, the founding of the Jesuits and the role of schools to labor with Christ in the vineyard of the Lord, but she also felt that she was able to turn that knowledge into action in the name of mission. Cole also shows how this learning of history and philosophy can create a common language on a campus that focuses conversations on the mission. As he puts it, “Participants from all three universities revealed an increased confidence that comes from the ability to utilize and understand a shared mission language which enabled action for mission through increased participation in, and perhaps. Facilitation of future mission programs” (2013, p. 189). This lines up with another of Cole’s findings. By training lay people to mentor other lay people in mission, Xavier University was able to create a program where the mentors are so well trained in the “assimilation of the Ignatian vision” that they are able to teach their own set of mentees how to do the same (2013, p. 126).

Cole also unearths a powerful finding about the effectiveness of forming lay leaders in their interior, spiritual lives. He explains that there is a critical component of Jesuit formation that lay people who take over roles designed for Jesuits oftentimes do not have: a years-long development of an interior life of prayer according to the Spiritual Exercises. He found that offering lay people versions of this training had “unexpected and long lasting effects on participants” (2013, p. 96). In a program for leadership development at Xavier University, participants said that more than the history of the Jesuits or the philosophy of Jesuit education, it was completing a modified form of the Spiritual Exercises that influenced their leadership styles and practices. In a program at Seattle University, participating in the Spiritual Exercises unlocked an ability for

deep reflection that was life changing. The key to this experience was beginning to practice daily prayer

Between these two descriptions of ways that lay people assimilate the Ignatian charism—namely, (a) teaching the history of the Jesuits and Jesuit educational philosophy as well as (b) giving the Spiritual Exercises—the null hypothesis that lay people cannot be formed to serve as faith leaders of schools is disproved. In these two ways, it is clear that lay people develop faith leadership skills through formation programs.

Daniels makes it clear that, indeed, formation programs offered by religious orders, formation programs that function within a school, and mentorship programs increase the self-reported capacity for faith leadership among lay people. Further, repetition of these programs adds to that capacity for leadership. This shows that the null hypothesis is false and faith leadership can be developed in lay leaders.

However, Daniels also discovers how important early life experiences are in forming faith leaders. Having attended Catholic schools, coming from a Catholic family of origin, having practiced the Catholic faith, and having already worked in Catholic schools are shown to be very influential in preparing a lay person for faith leadership. So, though faith leadership skills can be developed later in life, some faith leadership capacity is gained before a lay person can be formed at a Jesuit school. This qualifies the answer to this research question.

In summary, lay Catholic school leaders can be effectively formed, though the life experiences that lay leaders bring in with them remain important aspects of preparation for faith leadership. The null hypothesis is rejected.

Summary of this Study's Findings for Research Question 2

Research question number 2 asked, "What kinds of skills need to be developed for lay directors of works to succeed as faith leaders?" Cole and Daniels show that both (1) an interior life of prayer as well as (2) fluency in the history, philosophy and jargon of a religious context are core skills for faith leaders. In addition, faith leaders must be able to form their subordinates in these skills as well. Finally, faith leadership skills functioned differently than other leadership skills. Unlike other skills that can be broadly defined as the ability to complete a task well, the skills for faith leadership are more like personal practices that develop skills over time. It is the repeated experience of these skills in action that contributes to faith leadership ability.

Cole says that there are two specific capacities of spiritual interior life that support faith leadership capacity. The first is the practice of the Examen prayer. This prayer seeks to find the work of God in one's daily life. It also asks God to help the person making the prayer to conform their life to that will of God. The second capacity is practice of the Spiritual Exercises. Cole summarizes these effects nicely:

Program participants were acutely aware of the transformative impact of making the spiritual exercises. The transformation served as one of the more consistent surprises as a takeaway for program participants. The exercises heightened awareness for many participants and elevated a prayer life for some. The outcomes of participation in the exercises were positive for participants interviewed across all three institutions. The positive impact of the exercises resulted in a deepened involvement in mission and identity programs, and therefore, essential to the successful implementation of any mission formation program. (2013, p. 195)

Another program participant explained how making the exercises, "taught the concepts of deep reflection that transferred into greater awareness. This heightened awareness assisted in making connections in daily life, and provided more

meaning, simply because that existence was being studied with some significant intentionality.”

Indeed, Cole answers this research question very succinctly. Such programs, he claims, provide “opportunities for lay persons to experience critical components of clerical formation, specifically, a development of the interior life. It is this component of Ignatian spirituality ... that had the most unexpected and long lasting effects on participants” (2013, p. 95).

In addition to spiritual components, learning the history of the religious order, the philosophy of education specific to that order, and the jargon associated with both help prepare lay leaders. Indeed, knowing deeply the ideals of an organization and their originating context is necessary to be any good at promoting those ideals (2013, p. 107). Further, the simple visibility and modeling of members of leadership appropriating those historical and philosophical ideals has an inviting effect on others in the institution to also learn and appropriate the same. Finally, knowing history and philosophy and their associated jargon creates a common language that adds clarity to conversation, builds a sense of community and creates a culture centered on the mission of the institution. The importance of the development of the interior life cannot be overstated. However, it also remains the case that developing fluency in religious and educational jargon remains a necessary part of the formation of lay directors of works.

Rather than specify certain skills that prepare lay people to be faith leaders, Daniels discovered that it was certain experiences that lay leaders felt prepared them for their task. It is less about building skill capacity and more about experience that prepares a lay person to lead a religious work. Just as he

notes that whatever happens to a person through the practice of the Catholic faith over the course of one's whole life leads to self-perceived preparedness, whatever is acquired through the collaborative practice of faith leadership are the skills that lead to success as a faith leader. For example, he notes that it is experience as a Catholic school teacher and experience as a Catholic school administrator that prepared lay leaders best for their work (2013, p. 103). Faith leaders emerge from practice.

In Daniels's research, learning about the history, philosophy of education, and jargon of a particular religious institution is also important. In addition to the community-building and perspective-orienting reasons that Cole lists, Daniels writes that the capacity to teach this material to others is the skill that leaders feel allow them to feel prepared to lead (2013, p. 144). The importance of learning about the religious background is found in how it allows faith leaders to develop the Christian community of their institutions by forming faculty, staff, students, and others in the school community to celebrate their faith. Daniels sees a threefold dimension to this faith leadership: faith leaders need to (1) know enough to use the background of their institution to build community, (2) form that community morally and ethically, and (3) foster the faith development of the broad school community.

In summary, the studies indicated that there are three broad areas of formation that prepare lay faith leaders. They are (1) forming the interior life of the leaders; (b) teaching the history, philosophy and jargon of the particular religious background of the school; and (c) prior experience as teachers and administrators. The formation of interior life requires daily prayer, making a daily

Examen, and marking some form of the Spiritual Exercises of St. Ignatius Loyola.

Summary of this Study's Findings for Research Question 3

Research question number three asked, “How can the skills that allow lay directors of works to excel as faith leaders be acquired?” The research of Cole and Daniels is rich with successful examples of how this formation can take place. Cole lays out eight ways that form the interior life of the lay leader and teach the lay leader the history, philosophy, and jargon of a religious order. They are 1) teaching the Examen, 2) participating in immersion trips, 3) participating in retreats, 4) making the Spiritual Exercises in everyday life, 5) mentorship, 6) weekly readings and study, 7) national meetings, and 8) financial incentives. Each method will be explained more below.

At one Jesuit university, faculty and staff are challenged to pray the Examen prayer for one week. This helped imbue participants with a greater sense of reflection. This growing sense of reflection was intensified in immersion trips and retreats. After completing an international immersion trip, one faculty member described how the experience of that trip shifted their worldview, “especially in what reflective practice looks like—a place of asking reflective practice question more regularly about places I am drawn for good or for bad; or a different way of noticing what I am attracted to and what I don’t want” (2013, p. 95) Further, on retreats faculty can “gain perspective on their work and talk freely about the rewards and challenges of academic life” (2013, p. 86). This perspective allows a participant to integrate the mission of the institution and their work in concrete ways. Just as with immersion trips, these shared experiences create a sense of community around mission.

Perhaps the retreat experience that affects the lay leaders most is called the Spiritual Exercises in Everyday Life or SEEL program. It adapts the month-long Spiritual Exercises to be made over the course of a nine-month period so that one need not find thirty days to be away from work and other life obligations. This experience deepened participants' spiritual life, taught practice of daily prayer, engendered a habit of reflection, and integrated one's faith life into each participants' work at the Jesuit institution. Further, it created a sense of freedom that allowed the participants to make better decisions – an important attribute of a faith leader (2013, p. 163).

Mentorship has also proven an effective way to form leaders, for both the mentees and the mentors. At one university, future leaders are matched with Jesuits who mentor them one on one. Each pairing is selected between a Jesuit and a person who can be effectively affirmed and supported by him. After an initial period of mentorship, the mentee is also expected to begin mentoring the next set of leaders along with the Jesuit. Through this process, a layperson is formed in practices of mission and identity and has those practices reaffirmed as she herself forms the next set of leaders (Cole, 2013, p. 121).

Cole also demonstrates that reading groups – both informal and structured – are effective formation tools. He mentions two different programs, each with weekly readings followed by an hour or two for discussion. In one program, the topics range from studying the “historical elements about the forming of the Society of Jesus, the life of Ignatius Loyola, early Jesuits, Jesuit core values. Year two features a semester-long introduction to the spiritual exercises” (2013, p. 120). Another program focused on contemporary Jesuit writings

-- writings from General Congregations 34 and 35 on Jesuit-Lay collaboration or the “way of proceeding” in Jesuit education. The impact of these programs can be extraordinary. One participant described it like this: “I’ve seen people in tears because of the power of a revelation that came to them somehow through this and it just overwhelmed them. It’s just – it’s an extraordinary thing” (2013, p. 156). And like immersion trips and retreats, these groups create a powerful sense of community. Another faculty member described it like this:

Just to walk in to a seminar with 14 people who are willing to be there and do the readings and have the conversations. It is very humbling and fulfilling experience just to be in that space. Just to see the possibilities of the kind of engagement that can take place and to create the relationships. I mean just to have those relationships with people where you can talk about these things that are important to you and encourage one another to think about why they are important. (2013, p. 156 f.).

National programs also bear formational fruit. Through the Ignatian Colleagues Program, senior lay leaders from around the country are formed into 18 month cohorts where they study together online and also share retreats, an immersion trip, an Ignatian spirituality experience and capstone project (2013, p. 209). Institutions are not on their own to create programs and structures that help form lay leaders. And, as with any other of these methods of formation, all these programs involve developing the interior life of the lay person as well as teaching about the context of their work – historically and philosophically. And they do this with others – forming a community based around service to the mission through prayer.

The final approach to forming lay leaders is providing financial incentives. Offering a stipend creates both an incentive to join formation programs and also sends the signal that formation should be thought of as work to take

seriously. This also makes clear that this formation is central to the institution – so much so that it is willing to devote financial resources to support it. In total, these eight methods provide multiple answers to this research question.

Daniels points to six distinct ways that lay leaders can be developed. He cites (1) life experiences with Catholicism outside of the school context, (2) programs sponsored by religious orders, (3) work experience in Catholic schools, (4) graduate school, (5) mentorship and (6) participating in retreats and other faith activities offered by the school. Each of these six methods will be explained below.

According to Daniels, to prepare faith leaders, there is no substitute for having a Catholic family background, attending Catholic school as a child, and continuing to practice Catholicism. Though, obviously, one cannot be formed a leader to have a background in Catholicism retroactively, one can encourage lay leaders to practice Catholicism. All these experiences conspire to give leaders internalized understandings of the mission of the Catholic church and the particular religious charisms of the institutions they attended (2013, p. 146 f.).

Participating in religious order sponsored programs and experience working in Catholic schools seem to have the same effect on leaders. They deepen a leader's lived understanding of mission. Included in these sponsored programs are faculty retreats that can introduce the indispensability of relationships with colleagues at a Catholic school. These retreats can also aid in deepening the understanding the particular religious charism that animates the school (2013, p. 148 f.). Additionally, prior work in Catholic schools gives leaders experience as architects of culture. As teachers, they see what practices succeed in building culture among themselves and their peers. Later, as administrators they

gain experience implementing those practices and learn by trial, error, and reflection (2013, p. 145 f.). Finally, and intuitively, those leaders who have spent more years working in Catholic schools find themselves more prepared to be leaders. Interestingly, there seems to be a marked increase in self-perceived leadership capability after 20 years (2013, p. 152 f.).

Graduate school in Catholic education also successfully prepares leaders. This time of focused learning and reflection allows leaders to learn and evaluate different ways to exercise faith leadership. And, as with Cole, mentoring proves an effective way to form faith leaders. Daniels notes this is especially true when the mentors are members of the religious order. The formation offered by the mentors goes beyond simple teaching and encouragement. It is most effective when the mentor acts as a role model for faith leadership (2013, p. 148). Finally, participating alongside students in the faith activities offered by the school contribute to this formation. This builds an experience of community that is indispensable in faith leadership. And this is most powerfully experienced in attending retreats with students.

In summary, there are myriad ways that lay leaders are formed to be faith leaders. They range from early life experience to participation in many different programs offered by institutions to mentorship and groups to experience on the job. What all these programs have in common is forming the interior life of lay leaders through participatory experience and learning the context of religious education through direct instruction and experience.

Chapter V

Discussion

Lay women and men are increasingly service as directors of works at Jesuit secondary schools. This can present a challenge because those jobs were designed to be filled by Jesuit priests. The job responsibilities, then, presume a training in faith leadership implicit in decades of priestly formation and experience that lay leaders do not possess. This requires a formation of lay leaders in faith leadership to ensure their success in filling those roles. This study examines that process of formation.

It first asks if forming lay leaders to be faith leaders is possible. It then looks at what the content of such formation should be. Finally, it examines the methods of developing lay leaders of Jesuit schools. This study consists of secondary research. The qualitative data gathered in two studies of lay leadership at Catholic schools is synthesized to provide answers to the three research questions (Cole, 2013; Daniels, 2013).

Emphatically, it is both possible and important to form lay leaders to fill positions of directors of works. This is not just because of the necessity of lay leadership because of reduced numbers of Jesuits trained to lead educational works. This is because lay people bring their own gifts, experiences, and talents particular to their state in life to their roles. Most of all, though, this is because the Jesuits have determined that this transition is indeed part of God's plan for God's schools. And the formation of lay people to be faith leaders is successfully taking place.

The first way that this preparation is occurring is through interpersonal relationships. Both studies show that a one-on-one with a more experienced

faith leader – especially a Jesuit – focused on instruction, encouragement and modeling is a powerful tool. Further, peer relationships between lay leaders proves helpful in developing a supportive sense of community and learning from one another. This perhaps mimics the implicit experience of members of religious communities. As one religious put it, “some of our best faith training [occurred] when we left the school and returned home for dinner, sat around the table, and discussed our ministry as priests and educators as it was reflected in our day to day activities” (Daniels, 2013, p. 129 f.). Opportunities to ‘sit around the table’ with more experienced members of religious orders and peers thus fill in this particular gap in lay formation.

Further, there is no replacement for the public practice of serving as a faith leader. In Jesuit formation, this is offered in a low-stakes way during the time of regency when a young Jesuit takes on a ministerial role under supervision. Unfortunately, the corresponding experience for a lay leader is being thrown in the deep end and learning how to serve as a faith leader without the multiyear practice period offered in Jesuit formation. No amount of training can replace that experience. Prior experience serving as a faith leader, then, is an important qualification for serving as a lay director of work.

In the same way, no amount of training can also replace the experience of ‘being Catholic’ offered by a family of origin, formation in Catholic schools from a young age, and practicing Catholicism as an adult. These experiences help a person deeply interiorize the mission of the Catholic church and the approach of a particular religious charism in a way that cannot be simply taught. In a similar way, years of serving as a teacher and administrator in Catholic schools is a formational experience that cannot be replicated. The practice at

incarnating while serving at a Catholic school a charisma forms a person in a way that cannot be sped up. Perhaps this also accounts for the noted improvement in the quality of faith leadership after twenty years of experience in Catholic schools.

This importance of lived experience shows how ongoing formation must be seen as part of the job of a director of work. It should come with a financial incentive – formation to be a faith leader is on-the-clock time. It should be part of one's salary. It cannot be a simple add-on responsibility because this kind of formation is not easy. It requires a great deal of time and personal commitment. It requires emotional investment. This is especially difficult when there are so many more pressing demands on a leader's time. However, the results of faith formation can only be seen indirectly and only bears fruit from a long time of practice. As one leader says, this "may tempt leaders to dismiss prayer time and spiritual development time" (Daniels, 2013, p. 131). But there is simply no replacement for an experience of making the Spiritual Exercises, engaging in daily prayer, participating in national religious order programming and attending student retreats. It may be a challenge for a faith leader to accomplish the tasks set before her and spend more than an hour in prayer a day. But, that time in prayer should be a core part of the job, if the person is serving as a faith leader.

It is striking how much this formation resembles Jesuit tertianship. Tertianship is a year of Jesuit formation that occurs some years after ordination as a priest, often but not exclusively after 10 to 15 years of life as a Jesuit. Here is what Jesuits in the tertianship program are to do:

Apply themselves in the school of the heart, by exercising themselves in spiritual and corporal pursuits which can engender in them greater humility, abnegation of all sensual love and will and judgment of their own, and also greater knowledge and love of God our Lord; that when they themselves have made progress they can better help others to progress for glory to God our Lord. (Padberg, 1996, para. 516; in Kolvenbach, 2003, p. 122)

The time in tertianship is spent in making the thirty-day version of the Spiritual Exercises, studying the founding documents of the Jesuits, and working in a ministry with a focus on reflection. It is easy to see how much this resembles the successful formation laid out by Cole and Daniels. Both note the importance of internal formation, especially through retreats and most especially through the Spiritual Exercises. Cole notes how this kind of spiritual formation creates freedom in the leader to make better decisions, just as tertianship is supposed to do. This experience of the Spiritual Exercises also draws leaders into a practice of daily prayer which incrementally leads to greater knowledge and love of God. It centers and orients the leader in faith leadership.

Second, the studying of the origins of the Jesuits in order to facilitate “a deeper understanding of the spirit of the [Jesuits]” neatly mirrors the contextual formation found in reading groups and instructional programs (Padberg, 2009, p. 333 (GC 30, d. 7)). Finally, in tertianship, a Jesuit takes part in a pastoral ministry under supervision. This part of tertianship is emulated by the centrality of mentorship explained by Cole and Daniels. Perhaps, then, models of tertianship should be examined as structures to base the formation of lay directors of works. There exists a two-summer tertianship program that might be adapted to serve this purpose, since directors of schools often have more time available in the summers.

Limitations

This study was limited to data sets from two contexts that are different from the context of the purpose of this study. Looking at (1) formation of lay leaders for mission in universities and (2) self-reported faith leadership capacities in northern California Catholic schools can only suggest the direction of answers to the research questions. It can only indirectly answer the research questions and purpose which is explicitly a Jesuit context. Second, this is all qualitative data. It comes from document review, surveys, and interviews. Much of it is anecdotal. Though Daniels's survey data may be generalizable, all the rest come from patterns in responses unearthed by the researchers themselves. This makes the data reported from those studies subject to author bias. This too limits the certainty of response to these research questions.

Recommendations for Further Research

Three pathways for further research emerge. The first is simply an expansion of sample size to better find patterns in anecdotes and make the data more generalizable. Second, further studies could focus on Jesuit secondary schools on the West Coast which is the particular context to which this study responds. Finally, the twin conclusions of this study could be expanded upon. It clearly and successfully identified two distinct domains of leadership formation: the interior formation that focuses on the heart of the leader, especially through prayer, and the contextual formation in which the leader becomes fluent in history, philosophy, and jargon. Individual research could be made at a more granular level for each of those. One could ask about what kinds of interior formation are important and effective. One could do the same for contextual formation.

Conclusion

Three major conclusions can be made from this study. The first is that formation works. Lay leaders can and should be formed to be faith leaders. The second is that the formation should consider both interior and contextual dimensions. Third, there is no kind of formation that can replace the important of experience in preparing lay persons to direct works.

Formation Works. Both primary studies considered in this secondary study cite examples different formation programs that have positive results and helped lay leaders feel prepared for their faith leadership role. Everything from simple reading to making a thirty-day silent retreat contributed to formation to be better directors of works. Interview after interview found subjects raving about opportunities for formation and their results. New routines of prayer, particularly the Spiritual Exercises and the Examen, proved life changing to some. And many subjects could cogently talk about the concrete ways that formation experiences had changed them. This also reinforces the point that the transition from Jesuit to lay leadership in Jesuit schools is not something to be bemoaned or regretted but is an opportunity for new grace.

Necessity of Interior and Contextual Formation. Neither the formation of the interior life of a director of work nor the teaching of the context of a school and its charism can be neglected. Both are required. While the forming the interior life of a director of work may appear to be inappropriately personal and private, successful faith leaders have a life of prayer, especially having made the Spiritual Exercises. Interior formation is a tremendous time commitment, necessitating for some ninety minutes of daily prayer, which can be psychologically intense and demand total focus. This means spending more

than ten hours weekly on a professional practice that shows no immediate results. This might be difficult to persuade a board of trustees to consider essential and even more difficult for a board of trustees to assess. Yet for all this apparent impracticality it is an indispensable component of formation for faith leadership and service as a director of a work. The jobs of lay directors of works must be structured to find this time.

At the same time, though it might seem superficial, especially compared with the intensity and personalization of interior formation, simple teaching about a religious charism is also helpful in terms of forming leaders. This can be as simple as reading groups and occasional meetings. This work bears fruit. Knowledge of history and philosophy affects judgement and perception. It increases the self-confidence of leaders. Its study can grow mentoring relationships. And while some might dismiss religious jargon as content-free buzzwords, the use of vocabulary specific to a charism builds a sense of community and contributes to a focus on mission, even if the meaning of some of those words and phrases are incompletely taught or even lost.

Nothing Replaces Experience. All formational programs aside, nothing replaces experience. This may affect the hiring criteria for jobs as directors of work. This, perhaps, means that special consideration might go to candidates who already work at schools with the same charism. Alumni of schools sharing the same charism may be more prepared for faith leadership. The family of origin of a perspective leader matters. Special consideration also ought to be offered to Catholic school leaders who serve as teachers and administrators prior to their role as director of work, especially those who have served for decades.

And, as is required for successful internal formation, these roles should be restricted to practicing Catholics, not just for canonical reasons but because this experience contributes to stronger faith leadership.

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