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"Serviam": a Historical Case Study of Leadership in Transition in Urban Catholic Schools in Northeast Ohio

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"SERVIAM": A HISTORICAL CASE STUDY OF LEADERSHIP IN

TRANSITION IN URBAN CATHOLIC SCHOOLS IN NORTHEAST OHIO

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ABSTRACT

The purpose of this historical case study was to explore, through the lens of
knowledge transfer, answers to the following two questions: how did the Sister-
educators from one community in Northeast Ohio prepare themselves for leadership, and
when it became clear that the future of their urban school depended on transitioning to
lay leadership, how did Sister-principals prepare their religious communities and their
school communities for that change. This qualitative study focuses on six members of
one active, engaged, service-based community which has supported schools Northeast
Ohio for over a century. The research revealed that a successful Sister-to-laity leadership
transition will have its foundation in charismatic love, encourage faith-filled mentoring of
faculty and students, honor the mission of the founding community, and support an
overarching leadership culture of magnanimity to all stakeholders. This model can be
employed in other educational and nonprofit settings where non-hierarchical servant
leadership would be an effective approach.

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

CHAPTER I

INTRODUCTION

If according to times and needs you should be obliged to make fresh rules and change

current things, do it with prudence and good advice. —St. Angela Merici

Background

Sister Patricia Helene Earl (2008), a Servant of the Immaculate Heart of Mary,

served as an assistant superintendent of Catholic education in the Diocese of Arlington,

Virginia and recognized, as she moved through her duties, that educational leadership of

Catholic schools would increasingly—and eventually, totally—be entrusted to laity. She

also recognized that no model existed that would allow Catholic schools to train laity to

lead schools in the spirit, mission, vision and charism of the religious communities that

founded them. Her study centered on her curriculum of educational and spirituality

seminars for lay faculty, and in her ongoing reflexivity about the content and efficacy of

her program, she wondered if the formative and discernment practices she explored with

her participants could be generalized to Catholic educational environments in other

dioceses around the United States. The purpose of doing so was to enhance Catholic

school leadership practices and teach principals to create school cultures grounded in the

values, including equity, social justice, and honoring the person-in-community, a theme

so common in the charism of Catholic religious communities.

1

Similarly, as I grew in my own understanding in the art and science of educational leadership and had the opportunity to work in various urban environments in first secondary and then in higher education, I realized that many of the practices I incorporated in my teaching and advising have been completely influenced by women religious; the school leaders and teachers I knew as a child, adolescent and young adult. I am, as a product of sixteen years of educational experiences with both women and men in community, a Catholic educator in a public, urban university——I emphasize reflective learning, endeavor to practice humility and deference when learning to positively resolve conflict, seek equitable opportunities for students from all socioeconomic and cultural backgrounds, and acknowledge first each student's gifts and talents. I throw out the phrases "ask and ye shall receive" (Matthew 7:7), "to whom much is given, much is required" (Luke 12:48), and "many hands make light work" (based on Proverbs 10:12) to my students when they need help finding resources, when exceptionally bright students still complain about having to work hard at academics, and when students fail to collaborate effectively. I don't say these things to exert power over my students, to feel superior to them; I say them because I believe them, because I have seen time and time again their universal truth emerge in a myriad of contexts.

On a lighter note, I also use funny phrases borrowed from my Irish Sister-teachers, such as "was he born in a barn" to describe a person who is acting thoughtless or lazy; "stifling" to describe a stuffy room; "fierce" to describe weather (all weather; it doesn't matter if it's hot, cold, wet or dry); and the classic exclamation "Jesus, Mary and Joseph" when something shocking has occurred. Every spring, I grow nostalgic for days of making paper flower headbands for my school's annual May Crowning ceremony, where statue of the Blessed Mother was adorned with wreaths during a lovely outdoor

ceremony of singing, prayer, and (hopefully) sunshine. I love recollecting the distinctive smell of the incense that hung in the air after a Eucharistic Devotion, where I would, as a Sacristy helper in the Sisters' chapel, tidy the programs, straighten the chairs, and open the windows to air out the room before the next class. It was through my experiences with teaching Sisters that I knew I too was a teacher. I learned that I am at my best when I am, as the poet Marge Piercy wrote, a pitcher [who] cries for water to carry. I am happiest when I serve.

However, my history in having daily contact with and a lifelong affinity for women religious is not the experience of most Catholic school students today. It is likely that most students will never have a Sister full-time in either the classroom or as a principal. Lay professionals carry the charismatic mantle of Catholic leadership, including the critical aspects of vision, mission and spirituality of women religious who founded so many schools in our shared urban communities. Like Sister Patricia Helene before me, I wondered how women religious had reflected on this process. What did they come to understand about school leadership as they talked together and prayed alone? What did they want laity to understand about discernment, about vocation? What did they acknowledge about their own leadership values and processes? And—in a thought rife with sadness—when the last Sister leaves a Catholic school, how will the imprint of her religious community be protected by those entrusted to serve families and the community in the future? The idea study was borne out of this desire to honor the women who helped to bring my own educational aspirations to fruition. I hoped to archive an important facet of urban religious educational history; offer, as Sister Patricia Helene did, a functional model of discerned leadership for lay faculty in any school setting; and explore the shared standards, common themes, and intellectual and spiritual

values of religious women who have served as principals of Catholic schools in Northeast Ohio.

Research Problem

In 1965, the number of women religious in the United States totaled 181,421. In 2014, that number had fallen to 50,000 and 91 percent of professed women were 60 years of age or older (Cummings, 2015). While it is true that the number of women religious today echoes that of a century ago—the 265% increase of women religious in the United States between 1900 and 1960 was an historical anomaly that, by all scholarly accounts, was not sustainable despite the analogous growth of the American Catholic school system that demanded an endless supply of teachers—nuns in the United States represent only 7% of the total number of women religious in the world (Cummings, 2015; Lipka, 2014). That precipitous yet inevitable 72% drop of women religious since 1960 can be attributed to declining vocations, Sisters leaving their communities for other life choices, and, of course, death. Sisters, of course, aren't only leaving their communities behind; they are leaving the schools that were inspired by their founders, their order's charism, and their community's mission and vision of Catholic education.

From an historical perspective, recording the stories of the professional lives of women religious who shaped Catholic education is of utmost importance. The Holy Father, Pope Francis, himself a member of a community (the Society of Jesus) noted that

> …recounting our history is essential to preserving identity, for strengthening our unity as a family and count common sense of belonging... We have come to see how the charism has been lived over the years, the creativity it has sparked, the difficulties it encountered and the concrete ways whose difficulties were surmounted. (Pope Francis, 2014).

Understanding how the case—the community—helped its members discern their calls and by extension helped forge a vision of it in its schools is critical to finding trends and themes in Catholic school leadership. The "charismatic genius" of community life is that each woman religious is an agent of her order's ministry. Religious derive their ecclesial identity from their Profession, the spirituality of their congregation, and not from, as many mistakenly believe, any role as employees of the Church; they are not clergy and not laity, according to Schneiders (2011), but theologically not a third category either. This "placelessness" of Sisters as both non-ordained, non-cloistered ministers is one which the Church has never truly categorized, but no matter; since religious do not derive their identity from the Church, but rather their community's Rule, modern Sisters can choose to partner with laity in ministry as much as they choose their ministries themselves. In that spirit, since administrative partnership between founding community and laity in urban Catholic schools is now the norm, it is important to understand how women religious principals influenced and guided decision making about transitioning their schools away from direct contact with members of founding orders and entrusted the environments to well-trained, spiritually mature secular administrators.

The literature on the problem is clear. Schuttloffel (2001; 2003; 2008; 2012; 2013) has contributed the most heavily in recent years to examining the problem of what happens to an urban Catholic school when the last Sister leaves the principal's office and a lay principal is the only leadership upon which the future of an educational environment rests. She has been perhaps the most prolific writer to attend to this issue, but she was not the first; Bryk, Holland, Lee, and Carriedo (1984) and then Bryk, Lee, and Holland (1993) set the stage in exploring how Catholic education is not only an individual benefit, but a common good quality that is a powerful shaper and sharer of Catholic culture

5

within secular urban communities. Grace (1996) followed with a study in Catholic school leadership that acknowledged the conflicts between values promulgated in Catholic schools and the demands of the larger society. Rogers (1996) collected irreplaceable stories from active women religious about their teaching and vocational discernment and development, providing a series of guideposts for other researchers who want to be able to talk meaningfully with this population about their professional lives in education and educational leadership. Buchanan (2013), Coll (2006) Fitzpatrick (2003) and Mulligan (1998) each explored Catholic educational faculty and leadership in other English-speaking countries and how pressures on the laity to fill enormous roles as both spiritual guides for students as well as professional leaders for other teachers is difficult without adequate mentoring and cultivated preparation. Cook and Hudson (2006) explored the professionalization of teaching in Catholic schools, a much-needed trajectory that would (hopefully) lead to the refinement of leadership in Catholic schools. Collins (2001; 2005; 2006) and later Collins and Allender (2013) used the backdrop of post-World War II New Zealand to explore similar issues in Catholic educational leadership using knowledge transfer as her theoretical framework; it is this same framework that guided the underpinnings of this study and outlined in Chapter III. No time can be lost, posited each author, because the problem is not one that will happen; the problem is *happening*.

The Western Reserve and adjacent areas in Ohio have a long history of active Catholicism in a religiously pluralistic culture, and with the ever-increasing vibrancy and recognition of Cleveland in particular as a center of sociocultural, urban and historical research, the setting lends itself to a study of religious educational history. The dioceses, their parishes, and their schools contribute as much identity for the urban neighborhoods

as they do for their members (ex. the role of Holy Rosary and the Feast of the

Assumption in Little Italy, the role of parishes like St. Patrick-West Park and St. Malachi

for the annual St. Patrick's Day Parade). Catholic schools in Northeast Ohio continue to

provide educational opportunities to not only legacy families but also the poor,

underserved and marginalized (ex. St. Martin de Porres, Central Catholic). The

dwindling number of women religious nationally has affected Northeast Ohio, and their

aging population is one that should be mined for critical qualitative data about their

community's decision-making regarding their sponsored school, their implementation

and understanding of leadership theory and practice, and their discernment processes

about vocational development. This study filled that gap and added to the body of

knowledge about these educators before they and their stories are forever lost. In

choosing a still-vibrant community as a case study (Merriam, 2009), the researcher can

delve deeply into the particular inspirations, philosophies, ideologies and guiding

principles that influence its members in not only their teaching but also their spirituality.

The natural boundaries of the community lends to the appropriateness of case study.

      Although researchers like Schuttloffel have been writing about the crisis in

Catholic school lay leadership for at least a decade, no studies inspired by that work have

been conducted in Northeast Ohio, although ministries of Catholic consecrated women

have had a long, productive history here. As Morton (2002) observed in her work on

Cleveland Catholic orphanages,

> Catholic dioceses founded scores of care-taking institutions, including
>
> schools, hospitals, and homes... there were men and especially women
>
> religious to staff them... their institutions became efficient, relatively
>
> inexpensive ways of providing charity (p. 66-67).

Yet, Morton noted, despite their well-archived histories, large assemblage and social (and economic) significance in Northeast Ohio, these types of institutions have also been among the least studied by researchers from any academic discipline. Certainly, no studies have been conducted in urban Cuyahoga County which explore how local women religious educators who assisted their school to successful transition to lay administration not only discerned their own call to lead, but helped plan for secular professionals to succeed them. Schuttloffel especially provided numerous models and recommendations for schools to grow lay leadership that is theologically trained, grounded in social justice, and prepared to serve in the spirit of the women religious who preceded them, yet there is no evidence to show that her suggestions have been heeded and employed. No contemporary Catholic school child will likely attend a school in which there is a Sister in every classroom and one in the principal's office; that experience is but a memory for American Catholics over the ages of 45 to 50. Unless the challenges that women religious leadership and overcame as they contemplated transitions in their urban schools are recorded and analyzed the leadership knowledge of this idiosyncratic group of educators will be irretrievably lost.

Purpose of the Study

The purpose of this study was to reveal, using historical case study method and the theoretical framework of knowledge transfer, trends and themes that may help answer the following questions:

1. How did the Sister-educators from one community in Northeast Ohio who were called to the principal's role prepare themselves for leadership?

2.   When it became clear that the future of their urban school depended on

transitioning to lay leadership, how did Sister-principals prepare their

religious communities and their school communities for that change?

In this study, the researcher chose to use the qualitative method of historical case

study to situate her participants within their community. The schools where members of

the community served are an extension of the case; but for the community's collective

mission and vision the schools would not exist. The researcher used the data gleaned

from her participants to go beyond the limits of the case—the community's unique

history, charism, and mission—to uncover characteristics and themes that, when

considered together, addressed the heart of two research questions under scrutiny.

Significance of the Study

The role of women in leadership in Catholic settings continues to create dialogue

in the Church as well as well as in university classrooms, where the theoretical lens of

knowledge transfer is no stranger to the rereading of sacred texts, books of laws, and

dogmatic religious materials. Within the context of Catholic schools, knowledge transfer

can manifest as the transmission of cultural artifacts and identifiers that women religious

share with the laity who will, in time, lead and staff all the Catholic schools in urban

spaces in the United States. In exploring the how religious communities advance their

members in school leadership, a milieu of sources must be considered: the first source

will be the personal interviews with the women religious themselves. Ancillary sources

included artifacts and materials from the Sisters' tenure in both teaching and in

leadership—writings, photos, and other internal or personal memoranda. A second

source was extant scholarly research on Catholic school leadership, organization and

administration. Finally, the study gave critical friend review by other experts in

education policy, educational and religious history, and qualitative research methodology. This was a singular, local study that simultaneously situated in the larger context of policy studies regarding religious schools in the United States and the future of these schools in the second millennia. The intent of the researcher was to give a comprehensive analysis of how a group of women religious in postmodern, post-Vatican II America used the role of principal in a school to advance their community's vibrant ministry, internal administration, and community outreach even beyond the days when teaching Sisters were a daily presence in their communities' educational environment. In recording the decisions the community made and the challenges it encountered in effecting those choices, the researcher hoped to inform other schools anticipating transition how to best protect their mission, their resources, and, ultimately, the distinctly Catholic educational experiences of their students. In this way, religious communities are fulfilling the promises they made to the families who have entrusted children to their care; they are sharing their own blessings, extending the favor of those Sisters who contributed their own gifts and talents to the school in the past, and preparing future students for lives of learning in diverse urban settings.

From the analysis of community choices, strategic plans, lived experiences, and the challenges and successes of generations of consecrated women educators we can identify leadership models, ideological, theological or theoretical frameworks, and organizational paradigms that may assist other urban schools or school-like entities— nonprofits with an educational focus, for example—understand the essence and necessity for change, the power in re-visioning vision, and having fidelity to a mission so that intended populations are served fully and with a solid leadership style in place. Once these models, trends and frameworks are identified, too, the conversation for urban

10

educators in particular can continue with future research into other areas of leadership in transition that may impact student learning and development as well as organizational viability: faculty satisfaction, recruitment, professional development and retention in urban religious schools; the challenges of positive relationships with various stakeholders in Catholic school settings, including alumni who may not support change; the ethics of offering state subsidized private school choice in resource-depleted urban public districts; the role of single gender Catholic educational models in urban areas in the 21st century; case studies on specific principals or school presidents who made lifelong contributions to a certain educational setting; and other research opportunities specifically geared towards the urban school experience. This study was but one sentence in a dialogue that could fill pages of scripts, with many voices contributing to the chorus.

Limitations

The limitations of this study are plain. Only one teaching community was examined; while the researcher fervently desired to include multiple congregations, it was not possible to include a broad chorus of voices who live under different Rules and charisms. Several communities that were contacted via email responded kindly and with support for the project, but the Sisters from those organizations were geographically unavailable or in ministry other than teaching (Appendix A). The researcher had to make a purposeful choice to partner with only one community with ample potential participants in order to move the study forward.

A second limitation was that although this was a historical case study, it was not an all-encompassing historical analysis of Catholic school leadership. It was a bounded examination of the history of one urban community's process in transitioning its schools

from religious to lay leadership. This study did not pretend to address all the historical factors involved in Catholic school leadership in this Diocese. Such an undertaking would not be appropriate or realistic for the purpose of a dissertation.

The third limitation of this study was that generalizability from this study was restricted. The small sample and the selection of only one religious community limited the large-scale applicability of theory. However, the purposeful selection of the participants who were willing to be included allowed for a deeply personal and thorough examination of the themes and trends that emerged from the interviews.

Definitions

Charism: "The charism of a religious community is its particular personality within the Church — that which makes it distinctive and sets it apart from others" (Congregation of the Holy Cross, 2014). These things are linked to a community's history and helps define a community's mission in the world. Furthermore,

> The charism of a religious congregation refers to the distinct spirit that
> animates a religious community and gives it a particular character. A
> charism is part of the permanent heritage of a community, which includes
> the rule, mission, history, and traditions kept by the religious institute. The
> charism of a community is such that if all written records were destroyed,
> it could be re-created through the living testimony of its members
> (Dominican Sisters of St. Cecilia, 2015).

Martins (2010), describes charism as the "underlying spirituality of a community" (p. 3). "Derived from the Latin word for gift, charism links the present day community to the vision of its founder (p. 21). The nature of giftedness, both personal and community-based, is considered within the definition. For example, the charism statement of Sisters

12

of Charity of St. Augustine, a community of religious nurses who now sponsor the Sisters of Charity Health System in Cleveland (and therefore not the community under study) is, "Charity—namely—love of God, particularly as we find God incarnate in our neighbor, motivates us. We seek to love one another and each person we encounter."

Woman (women) religious: "The religious vocation is a summons sounded in the soul of the Holy Ghost... the objective implications of a genuine call from God are presented to the aspirant during the initial years... when these decisions have been made in favor of the aspirant, she is admitted to profession. Only then does she begin her *consecrated religious life* [emphasis added]" (McGoldrick, 1964, p. v). When considering women who have taken specific vows to become members of various religious communities (also called congregations or institutes), the term "woman (women) religious" is commonly used whether the community is more contemplative or more active in its mission.

Discernment: Martins (2010), describes discernment as "act[ing] in accord with God's desires to... feel a sense of peace. That insight—that following God's invitation leads to peace—is a central part" of the experience and process of discernment. Discernment is by definition a consideration of goods; since no mature decision-making would entertain an evil option, only choosing between justified alternatives are prioritized. Discernment can present in several methods and processes, but it its core is always seeking confirmation from God that the decision reached—after thoughtful, prayerful consideration—is the correct one.

CHAPTER II

REVIEW OF THE LITERATURE

Be bound to one another by the bond of charity, treating each other with

respect, helping one another, bearing with one another in Christ Jesus; if

you really try to live like this, there is no doubt that the Lord our God will

be in your midst.—St. Angela Merici

Introduction

The first goal of this historical case study was to use semi-structured interview to uncover how, in a single community of Roman Catholic religious, the Sisters who were called to leadership prepared themselves for the role of principal in an urban school. The second goal of the study was to reveal how communities planned for the transition when it became apparent that the future of their sponsored school depended on the introduction of lay leadership. The extant literature on the subject has revealed that, as in any school transition, there are often many competing interests: fidelity to the original mission of the school; the ongoing ability to meet academic and socio-affective needs of children; and financial considerations. In a community-sponsored Catholic school, however, there are other factors to consider, including how future leaders are professionally and spiritually prepared for leadership, social justice issues such as wage and gender equity

for school leaders, and what influence the community hopes to have on a leadership population that has become farther removed from being taught by, and subsequently teaching alongside, the women religious whose charism inculcated an original identity to the school. The settings of this study were urban areas in Northeast Ohio, a region deeply influenced by Catholicism and its identifying organizational frameworks, including large parishes with K-8 grade schools, independent (non-parish affiliated) secondary schools (both single sex and coed), and liberal arts colleges. In recording and analyzing these transition processes, especially challenges and outcomes, the researcher was able to show how the members of a Northeast Ohio community of women religious both discerned their own call to leadership as well as helped prepare their schools for a transition to lay leadership.

In this chapter, the review of the literature was organized as follows:

1. The vocational development, professional growth and leadership styles of women religious in Catholic schools as well as in their own communities;

2. The ways in which professional development, mentoring, and reflexive preparation for leadership can ease a school's transition from a religious to a lay principal;

3. A particular overview of the excellent prescriptive writings on this topic by Merylann Schuttloffel, PhD.

Dr. Schuttloffel is a premier researcher on this issue and has advanced recommendations on how to protect the integrity and structure of Catholic school leadership. However, no other studies have emerged that explore outcomes of Schuttloffel's proposals when implemented in urban Catholic schools in Ohio. It was this gap that should be addressed not only for historical preservation and archival

15

purposes in Ohio religious education history, but as a referential series of models that other schools or organizations in transition can look to for guidance.

Women Religious and Leadership for Community and School Contexts

The apostolate for a significant percentage of women religious throughout their 300-year history in the United States has been education (Kealey & Kealey, 2003).

> The Ursulines were the first teaching order to organize a school in colonial New Orleans in 1727 and survived in the city through fire, Spanish occupation, and the eventual purchase of Louisiana by the United States, making the Ursulines the first community to serve Bishop John Carroll in the Diocese of Baltimore (p. 22).

It was in Maryland that the Catholic parochial system was developed in large part by St. Elizabeth Ann Seton, foundress of the Sisters of Charity, who provided teacher training for her sisters as well as a curricular framework for a typical Catholic school day of the time. The dioceses that comprised Northeast Ohio have long history of providing teaching communities with opportunities to build convents and schools, actively minister in the cities, and led pastoral care at parishes (Sister of Charity, 2011). The teaching Sisters who settled in the Western Reserve lent their charism—their spiritual gifts—as well as markers of their community identities to the schools they founded. As the remaining population of women religious ages (the Center for Applied Research in the Apostolate [CARA] predicts that there may be as few as 1,000 women religious in 2043 if current trends continue) planning must be in place in order to prepare for a time in which no living Sister will have influence on a school founded by her community (CARA, 2014). The transfer of critical knowledge about tradition,

16

vision and mission from the religious to the lay administrators and teachers must be purposeful, carefully contextualized and imbued with the enthusiasm and charism necessary to grow committed, discerning leaders from within the lay educator population. This study endeavored to reveal how that knowledge transfer has begun and what work remains to be done in order to allow lay educators and leadership to take urban Catholic schools faithfully into the next millennium.

Vocational and identity development among women religious and female aspirants is an area of the literature that has produced some data, but a limit to that research that it is now over 40 years old and was designed by men in a time when the male-centered control of the Church was even more entrenched. Women religious were just making sense of the changes Vatican II demanded of them, and their communities were still flush with Sisters; the exodus out of community life that defined the 1970s had not yet begun. Maddie and Rulla (1971), used quantitative analysis to reveal that that women religious viewed themselves as disciplined, deferential, and selfless, descriptors which may still be true today but which also carry a certain flatness, a humorlessness that renders Sisters more caricatures and two-dimensional as humans. Later, MacCurtain (1995) noted that the archives of convents often contain well-organized documentation that exemplifies the presence of these qualities in its personnel; however, she found that these same archives also contain records of spiritually vibrant women whose personalities in journals and letters belie the image of the "sterile, narcissistic woman religious" (p.58). They often express their prayer and spiritual growth through self-created multimedia materials for both public display and private reflection. These creative outlets enrich the Sisters' experience of spiritual commitment and community and contradict the public

17

perception of nuns as humorless, disinterested and rigid. In two decades, then, the

research evolved from defining these women via passive questionnaire and descriptive

statistics into presenting a qualitative, holistic view of Sisters in all facets of their lives:

spiritual, vocational and professional.

In exploring the ordination question for Catholic women, Blenkinsopp (1995),

noted that women religious in leadership roles have often exercised control in a school

similar to the priest in a parish. Sister-principals, within the sphere of their administrative

influence, drive vision and mission of schools and in secondary schools often do so

without the express consent of priests who influence K-8 parish schools. Similar to the

kinship group and exclusive control a priest has for his congregants, a Sister-principal in

secondary education has a strong theological and cultural influence on her school. The

integration of religious truth and values with the whole of a student's life is brought about

not only by the unique curriculum in a Catholic school but, more importantly, by the

presence of leaders who express an integrated approach to learning and living in their

private and professional lives (United States Catholic Conference, 1996b). The elevation

of women religious to educational leadership is certainly not a Sacramental equivalent to

a man's ordination to the priesthood, but it is a domain in which women have historically

been given autonomy and acceptance in dioceses throughout the United States.

Andronovien (2013), also explored a number of themes common to the question of

women's leadership in religious settings: that the practice of leadership gives rise as

much to identity as it does to perfection of skill; that even in communities where women

are accepted in service and local ministry they are often not tolerated as policymakers by

the male bishopric; and that the larger historical context of women being largely invisible

in public life cannot be ignored when examining their dynamic lives within church and

school walls. It is not perfectly true, then, that women religious never hold the staff of the shepherd; they do so within spaces of power within the school and within their community.

Schneiders' (2011), lecture at the Center for Spirituality of Saint Mary's College in South Bend, Indiana praises in her words, the life of Religious [sic] and notes that "the notice of our demise is greatly exaggerated." Noting that the growth of religious until 1900 in the United States was bolstered by immigrant European sisters serving in American convents to mission and minister, the unprecedented surge of vocations that occurred post-World War I and continued until well into the 1960s was not a typical trend, should not now be looked to as representative of religious life in any century, and the resulting number—over 180,000 religious by 1965—was never sustainable. The aftereffect of the inevitable decline in vocations post-Vatican II means that the median age of Sisters has moved from about 40 in 1965 to close to 75 in 2017. Schneiders, herself a religious (an IHM, a Servant of the Immaculate Heart of Mary) promotes that religious will exist in the future, but they will not be "hordes of novices... to staff the institutions of a ghetto Church defending itself against the world" (p. 12) but rather older adults responding meaningfully to a vocation through careful discernment after the often tumultuous early adult socioemotional development. Their ministries will take on new forms not necessarily aligned with those in pre-Vatican II life—one namely being school founding and administration. Schneiders notes that the "hermetically sealed" congregational life of the past—the silo mentality that compartmentalized communities and prevented them from effectively partnering with other orders or the laity—has to be revisited, including developing more modern and appropriate leadership models, exploring inter-community living and ministry, offering creative and flexible formation

and discernment programming, and advocating for what Schnieders calls "corporate resilience" in stewardship of resources (p.14). Schneiders also identifies four clusters of ministry—social justice and activism, direct service to the marginalized, scholarly service, and spiritual growth services. Education and its branches (teaching, administration, research) would fall into the third ministry, where religious express the Gospel through teaching others to be "thinking hearts" (p. 20) in the world, and it is through their discipleship that laity is invited, in equal partnership, into share in that ministry. This theoretical framework, which study advances as knowledge transfer, gives religious and laity both their autonomy in giftedness and their connectedness in spirituality. The consciousness (particularly, Schneiders argues, *feminist* consciousness) that arises can allow successful transition in sponsored institutions where religious and lay faculty and administration "espouse an ideal of inclusivity... and empower all participants through a sharing of responsibility and authority" (p. 25). The resulting schools are, in a way, re-founded in the spirit of cooperation and commitment to the challenges of promoting Gospel values in a postmodern American culture.

A challenge to the autonomy of women religious emerged in in 2009, when the Vatican instigated an apostolic investigation of many communities who align membership in the Leadership Conference of Women Religious (LCWR); which had1400 communities with 51,600 members that represented 80% of all women religious in the United States (LCWR, 2015). The Vatican assigned Mother Clare Millea, Superior General of the Apostles of the Sacred Heart of Jesus, to act as "visitator" and collect data on the ministries of communities all over the country (McGuiness, 2013). The National Catholic Reporter online (2009) speculated that women religious have "nothing to hide and a marvelous story to tell," and that the Rome's concerns about the "orthodoxy and

20

loyalty" of the LCWR are premised on the notion that some dire discrepancies will be found. Mongoven (2009) noted that women religious had proven themselves adaptable and evolutionary in times of economic and organizational challenge. Collaboratively, they re-visioned their charisms for applicability to modern contexts; they spearheaded collegiality in church lay leadership; they modeled "person-centered pastoral approaches" that emphasized the model of Gospel-centered love; and finally, post-Vatican II women religious entered teaching and ministry on a national level with unprecedented vigor and visibility. Their numbers may not be growing, but their commitment to their missions did not falter. They embodied, Mongoven noted, the true spirit of the Vatican II reforms. Their story is one of service and celebration, especially as their work relates to the ongoing power and focus of schools in urban spaces. This experience is one which bonded the communities of the LCWR together in solidarity, and certainly there should be a future recording of on the lived experience of the women whose communities were under scrutiny. While the inquest was abandoned under Pope Francis in 2014 (Hooper and Woolf, 2014), the effects on the communities (positive as well as negative) were powerful, perhaps unexpected, and certainly worth exploring as a study into the tension between a distant, often theoretical, still-patriarchal Church hierarchy and the modern women religious who are on the front lines of personally advancing through knowledge transfer the Gospel by their teaching, healthcare, pastoral ministry and mission work.

Perhaps in preparation for the process of knowledge transfer as well as for their own evaluative and contemplative goals, women religious have frequently demonstrated incredible reflexivity in considering their organizational structures, their core values in advancing their missions, and their decision making practices. This is particularly true in the turbulent re-visioning of American religious community life since Vatican II.

21

Nowhere was this more evident than in Rawe's (1991) meticulous detailing, through historical case study, the Sisters of Loretto's decision-making processes post-Vatican II. Noting that women religious value both the collegial process and collective experience— concepts Rawe alleges are "feminist" in nature (1)—the author queries the data in an attempt to reveal how Sisters became more activist in their professional vocations, in community life and leadership, and in choosing how to manage shrinking congregational resources (property, finances, information) including perhaps the most significant one— personnel. Rawe notes that with the publication of Daly's (1968) The Church and the Second Sex, women religious had at least one insider in the academy (Daly taught at Boston College) not only acknowledging but actively promoting the idea that Church patriarchy aggressively harvests the best gifts and talents of Sisters while at the same time excluding them from even cursory agency within their own congregations, let alone their own lives (Daly, 1985). Both first order and second order changes to the organizational structure of religious communities—subtle changes and major revisions—ensued, and by the 1970s American Sisters were engaged in active renewal of all the ways in which their respective communities' missions could be supported and advanced.

After the strength of the organizational skills that Sisters possessed was publicly recognized—the extensive networking ability, the instant recognition as educated women of service, the power of being able to consolidate their collective voices—communities like Loretto took action. "In an effort to renew fidelity to their charism-driven missions, Sisters used paradigms like liberation theology and social justice to define for themselves their own professional aspirations (including when to retire), their leadership structure, and their financial needs" (Rawe, 1991, p. 92). This bureaucratic change in ministerial choice—that Sisters are more free to choose their roles without express direction (or at

22

least strong encouragement) from congregation leadership—could be a place of intracommunity discord. Instead, the Sisters of Loretto and other congregations similarly situated balance the need of the individual Sister with supporting her as she finds, in her own way and time, the best means by which she can convey the mission and charism of the community (Rawe, 1991). For Sisters engaged in educational leadership, the ability to make decisions for their school contexts without absolute mandates from their congregational administrators was critical, since they could embrace difficult or even unpopular choices if necessary to protect the larger mission.

Sr. Joanne Schuster, a Franciscan Sister of the Poor, (F.S.P.), has asserted that religious congregations--specifically women religious--no longer identify with being "obedient agents of the hierarchical church" (2012). Rather, she uses the quantum approach to see congregations as a "field" and the members as interconnected beings whose non-linear, non-hierarchical collaborations are enhancing to one another and the whole (p. 24).   In physics, *quantum (*pl. *quanta)* represents any of the small categories into which energy can be divided; waves are a common study of how the energy of sound, for example, is organized. *Quantum* in Schuster's context is a more contemporary way of seeing leadership as dynamic and reflexive way rather than linear and with a single direction (typically, top-down). Schuster posits that the quantum approach was more in line with modern thought regarding relationships in group and individual spirituality, a key element in the success of religious communities. It offers members the opportunity to live with "intentionality" as they work together and individually to value the charisma and mission of their congregation and deliver those messages to their local communities through ministry. Schuster has acknowledged that context is critical in knowing when to employ a traditional (top-down) leadership model rather than a

quantum model, but that the latter is helpful when navigating unfamiliar paradigms within groups.   It is also essential that communities maintain autonomy in determining best practices in advancing their mission and vision.

Both the historical case study and life history approaches have contributed to the body of literature on specific women religious who valued professional development and best practices, knowledge transfer and reflective teaching and leadership practices. Sisters Ruth Caspar and Rosalie Graham (2006) explored the life of Mother Stephanie Mohun (1868-1954), a Dominican mother general who was instrumental in the development of professional education for teachers and administrators. Mother Stephanie mandated that all Sisters complete "normal school" training under the supervision of a director of education (another Dominican), and that all Sister-teachers have access to the most modern curriculum, methodology, and technology for use in their numerous secondary and postsecondary schools in Ohio and New England (p. 351). With this model of professional development firmly in place, Mother Stephanie offered her students some of the most highly educated Sister-teachers in any diocesan system. Over 300 Dominicans completed graduate as well as undergraduate degrees and staffed two colleges, 24 primary and secondary parochial schools and advanced missions during Mother's tenure as superior. Caspar and Graham's biographical sketch is certainly laudatory, but also telling in its emphasis on Mother's vision of professionalism for her teachers, one which has persisted at Dominican institutions to the present day.

Smyth (2013) had used historical case study in her analysis of the lives of two Sister-principals, Mother Mary Edward McKinley and Mother Mary of Providence Horan of the Sisters of Providence. In that piece, the subjects of the case study were long deceased and the researcher had to triangulate her data with using archival sources,

24

community documents and the subjects' own writings. However, a comprehensive, cohesive portrait of those women as both school and community leaders developed through the author's careful analysis. Walsh (2010) used historical case study in her dissertation, which focused on eight Catholic schools and their principals in an urban area. She found that the four schools she coded as "resilient" practiced intentional transmission of the founding charism and well as proactive, supportive governance; four schools she coded as "edge of chaos" had failed to do either intentional charismatic transmission nor a contemporary governance structure and the schools' future viability was at risk. She was able to make recommendations for religious congregations undergoing school change as well as present opportunities for future research in the field.

In a fully developed collection of life histories, Rogers (1996) recorded the stories of women religious who put leadership into practice, as one noted, "the way . . . it should be done for the kids" (p. 9). One theme that emerged from many of the stories was that each woman was deliberately mentored by another Sister in her community: one was encouraged to earn a PhD, a process so transformational that had she not started doctoral school she wasn't sure she would have been able to remain in her convent; another was given the opportunity to be a principal after having lost another coveted role and felt that her vocation was reborn. Still yet another was given the chance to travel, research and write, resulting in a published bibliography of over 30 books plus a 50 year career of teaching and public speaking. The way in which each of these Sisters was carefully cultivated and her talents and gifts given the chance to develop naturally by peers already in leadership is a model that should be replicated with potential lay leadership in schools. Growing leaders from within is a practice in communities that has produced brilliant

results for school leadership in the past and can continue to do so if intentionally operationalized.

Sister Maureen Abbot, SP, spent nine years researching and writing a masterful history of her community, the Sisters of Providence of Saint-Mary-of-the-Woods, Indiana (2013). Using a three-pronged framework—"discover what did happen, explain why it happened, relate that explanation to the values, resources and constraints of the people at the time" (p. vii), Abbot endeavored to explain why a community that had aligned itself so closely to its Rule since its arrival in the United States in 1840 would seem to suddenly, in the late 1950s, undergo an extraordinary transformation of its mission, administrative structure and educational outreach; she wanted her volume to "lead to a deeper understanding of the underlying causes for . . . sudden changes in longstanding patterns" (p. ix). By 1963, for example, the congregation had moved to a more modern model of participative governance on critical decisions such as creating an office of vocations with a director at the helm (p. 386); the reclassification of the position of supervisor of schools in which the Sisters worked to the more comprehensive director of education, since the role had expanded so much that to merely title the sitting Sister a "supervisor" was disingenuous and belittling (p. 396); and a formal process of assessment of needs for every school in which the congregation missioned, which led to important organizational changes in how the Sisters managed their schools' finances, physical plant needs, and teacher training and education (p. 468). Indeed, organizational management of the SP schools is common theme in Abbot's analysis and one which illustrates the importance with which teaching communities in the 1960s understood the need to be open to change in curriculum, teacher preparation and leadership. This case study, so carefully bounded and delicately detailed, is an exhaustive exploration of a teaching

community that continued to value its "old truths" even as it actively cultivated new visions of its charism—love, mercy and justice among God's people—through its ever-evolving schools (Nudd & Klingel, 2012).

Like Abbot, Johnson, Wittberg & Gautier (2014) have a background in religious life (Johnson is a Sister of Notre Dame de Namur; Wittberg is a Sister of Charity). Their research focused on women who entered communities after 1965. They used generational analysis for interpreting their data; their approach, more sociological than educational in nature, nevertheless revealed critical aspects of Sisters' views on ministry and community in a post-Vatican II American Catholic culture (p. 2). While not focusing on teaching communities specifically, the researchers revealed themes salient to communities facing transitional issues in their missions, such as younger Sisters feeling outnumbered by older, somewhat recalcitrant, yet admittedly experienced voices in leadership (p. 70) and the lack of support the Church often gives for the gifts and talents of her female members as they advance in their vocations into new or untested ministries (p. 91). One element that is particularly relevant to the proposed study was the theme of "visible identity markers;" the Sisters in the study frequently noted that their exposure to Sisters in educational contexts—as teachers, principals, and other administrators—laid a foundation within them that solidified the distinctive charism of that particular Order in a loving, kind, joyful way (p. 94). It is impossible to say that without this close, long-term contact in a school setting—one Sister noted, "I had the sisters in my community as teachers from the first to the twelfth grade"—that none of the respondents would have discerned their vocation. However, it is probably true that the culture that the Sisters were able to sustain in their school by daily exemplification of their community's ideology was influential on students considering religious life. The Sisters note that they

are fearful of burnout as more and more duties fall on the younger women of their

communities, and they are also fearful that the lack of exposure to vibrant, active Sisters

will impact the Church's ability to meet the needs of its members.

> In the nineteenth and twentieth centuries, religious institutes of women
>
> built systems of education, healthcare, and social service in response to the
>
> needs of those within and outside the Church. Today, the charitable works
>
> of women religious in the United States are described as 'the most
>
> formidable influence in the tradition of Catholic philanthropy in our day'...
>
> the religious institutes were at the forefront of the Church's responses to
>
> societal ills... the Church risks losing much of its influence... even over the
>
> schools, hospitals, and social service agencies once so firmly linked to the
>
> Catholic philanthropic tradition by multitudes of sisters (p. 135).

The proposed study hopes to find, through a qualitative approach, answers to the question

of how one community of educators prepared for that seemingly inevitable loss of

influence, how it planned for continuing its spiritual mission thorough laity, and how the

institutions that bore the imprint of these communities envisioned their sustainability in

an increasingly secular urban center.

Professional Development: Vocational Discernment and Formation for the Laity

> The percentage of lay teachers is as heavy as we ever care to have it... in
>
> most cases the best lay teachers do not approach the average Religious
>
> [sic] in performance. Consequently, we feel strongly that the more lay
>
> teachers we have, the less effective will be our schools - Edward Reilly,
>
> Superintendent of Philadelphia Catholic schools, 1960 (Walch, 2003).

The huge influx of children into Catholic grade schools in the 1950s and 1960s stretched the resources of even the most persevering dioceses. It was not uncommon for teaching Sisters who have upwards of forty children per classroom in the most in-demand parish schools (Walch, 2003, p. 167). Financial strains were of utmost concern; lay professionals required salaries, for example, and some in the bishopric from pre-Vatican II refused to acknowledge that not every Catholic child, because of her parents' ability to pay or her parish's ability to find space, would have a Catholic school experience (p. 175). By the 1980s, the Catholic school teacher's salary was about half of her public school counterpart's and, as such, a lifelong commitment to working in such an environment would eventually prove untenable. Without that longevity, it would become impossible for a refined leadership to emerge from a well-trained lay staff. The frequent transition of lay personnel would add to the tenuousness of urban public schools, which by the end of the 1980s were increasingly populated by low-income children from racial or ethnic minorities; in many American dioceses, higher socioeconomic status white families had, by that time, moved out to bigger, wealthier parishes in the suburbs (p. 240). With those factors muddying already churning waters, Grace (1996) further observed that the lay leaders in Catholic schools bear the enormous burden of preserving the distinctive character of the Catholic school identity. They not only have to address financial issues, recruiting tensions, physical plant challenges and other stakeholder dilemmas, but are also responsible for ensuring the Catholic development of every student. The spiritual dimension of lay leadership, explored at length by Bryk, Lee & Holland (1993), is at a critical juncture with forces in public schools; there are economic differences (it is not uncommon for students to be heavily subsidized in order to participate in Catholic education, even if a school is financially strapped) as well as

29

communal ones (many schools have strong ties to justice organizations and activities that are at odds with larger secular social conventions). As a result, the new Catholic school lay leadership must be prepared to protect the values and identity inculcated by years of guidance with religious at the helm, even as schools move farther away from that experience.

Dioceses in the United States are not the only entities to have considered these issues. Catholic school systems in other countries have considered the questions of whether lay administrators can or should carry the weight of setting the state for spiritual formation of Catholic students. In England and Wales, McClelland (1996) and Kelly (1987, as cited in McClelland, 1997) have written about the identity of Catholic schools as apostolates of the Church and the need to protect both dogmatic and doctrinal tenets in the face of a changing social and political fabric driven by secular educational policy. McClelland noted particularly that in a climate of "school accountability," Catholic schools are vulnerable to being devalued in the ledger book of school data moguls because the very elements that contribute to Catholic school success—culture, tradition, values—are impossible to measure. The teachers who may best be able to protect them have to be cultivated carefully and cannot merely be hired in from a pool of even well trained secular education professionals.

In Scotland, all teachers in Catholic schools must be Catholic and must approved by the local diocese as being "committed to the promotion and support of the Catholic school's mission, aim, values and ethos" (Coll, 2006) and that faith development is as essential to lay teaching and leadership as professional improvement. However, the Catholic Church in Scotland, like the Catholic diocese in Northeast Ohio, is nearly void of teaching religious (Fitzpatrick, 2003); for years, the assumption was that lay teachers

working alongside teaching religious would, via knowledge transfer, internalize the charism of the order under which they labored and continue the mission as would have the men and women who founded the school. Administrators of Catholic schools in Scotland eventually realized that at least the faith development of lay professionals could not equal that of vowed religious who were without secular distraction, and set about implementing a faith formation program that was responsive to the idiosyncratic needs of Catholic teachers in Catholic schools. They prioritized it as a comprehensive program, increasingly reflective as to why education of this type was not previously available; which allows for prospective, positive planning (Coll, 2006). Certainly, all of this is taking place in a context where it is likely many of the children who attend the schools are not themselves Catholic, but in Scotland every Catholic teacher is presumed to be a religion teacher as well as an academic content specialist. There is no separation of the two roles. In Catholic schools locally, the same may be true for faculty and administration, and so faith development as a corollary to professional academic development could employ the Scottish model.

Australia, too, has considered the problem. Buchanan (2013) explored the recent trend of Australian Catholic schools elevating to senior leadership team the role of lead religious educator. There are often many more leadership candidates in a faculty than there are specially trained catechism teachers—primarily because the candidates no longer come from the pool of men and women religious—so schools have to support potential leadership in expanding their educational opportunities relative to qualifications in religious education (Crotty, 2005). This additional education can often add a second or even third content area to a leader's credentials and is almost always at the graduate level. Noting that the duties of lead religious educator are often idiosyncratically defined and

titled within each school, Buchanan observed that the qualifications of lead religious educators to offer programming such as liturgical work was often more valued by hiring principals than skill, for example, in developing curriculum (p. 121). What is even more valued is the alignment of lead religious educators' personal and public lives with their professional roles. Given then, the comprehensive nature of the religious leadership role and the extraordinary demands it places on the holder, Buchanan's qualitative research reveals that without consistent mentoring through the often alienating aspects of sponsored training ("we are working full time teaching and trying to ignite the religious dimension of the school as well as attending Mass on Sunday") (p. 126) aspirants to lead religious educator roles falter emotionally. What could alleviate their anxiety, in addition to direct mentoring and leadership coaching is networking with collaterals at other schools to developing a shared protocol of programming and resources in order to both elevate their professional development and deepen their content knowledge. What emerges from Buchanan's work, aside from a high adaptable model for growing religious leaders, is the pressure that is exerted on lay educators who assume the leadership roles formerly held by men and women religious. Those Sisters and Brothers (and in some cases priests), already immersed in doctrine and dogma, do not necessarily require the same type of training as their lay colleagues and do not have the same competing interests, such as public and private lives outside the religious sphere. Whereas lay leadership struggles to traverse two worlds out of necessity, religious leadership has deep spiritual and purposeful roots in one. The challenges to lay leadership, then, must be acknowledged and compensated for by the schools and dioceses they service.

The shortage of vowed religious as teachers in Catholic schools has also been the scope of Cook and Hudson's work, which examined the crisis in qualified religion

32

teachers in many geographic areas, even where Catholic schools are plentiful (2006).

Unlike Coll (2006), who described the teaching of religion as a role, Cook and Hudson called it a "ministry" (p. 401) and hypothesized that without a pool of suitable teaching and leadership candidates for religion, the very mission of a Catholic school is called into question. As with any faculty, recruitment, preparation and retention of qualified emergent leaders is essential, but especially so in a culture climate where there is a significant shortage of men and women religious as both models and peers for lay professionals. In that same vein, then, Cook and Hudson recommend the professionalization of teaching religion, especially as it is juxtaposed with lay ministry by non-religious in Catholic schools. Not just the ordained and vowed are responsible for ministry; baptism and confirmation are empowering sacraments that confer ministering agency on all Catholics, including and especially lay principals in Catholic schools (p. 402). This cultural currency —the blending of minister and leader in one—is an asset for leadership in Catholic contexts, where staffing is often a challenge. The stakeholders, including present families, alumni, and the local diocese, demand comprehensive Catholic role modeling across the continuum of faculty and administrators.

A member of the Congregation of St. Basil, D'Souza (2002) explored the philosophical underpinnings of teacher preparation in Catholic schools and the importance of educating the intellectual lives and logical development of children entrusted to that system. Preparation of Catholic school teachers is, as D'Souza noted, "an intentional activity" (p. 436) that combines religious doctrine with academic discipline. The personalities of all children who learn under the tutelage of prayerful, spiritual teachers will grow into their own spiritual liberation of love, wisdom and service. Like every educational environment, the context of the Catholic school is

communal and social, but there is an equally high priority on the growth and development of the unique person in other settings. Catholic lay administrators in particular need more than mere theological training; they need a matrix of lifelong learning and spiritual development.   Having a powerful double helix of intellectualism and philosophy is the means by which leaders in a Catholic system can truly have a growth trajectory.

A Philosophy of Change: Planning Reflective Practice for Effective, and Distinctly Catholic, School Administration Transition in Urban Religious Schools

Caruso (2012) offered an initial primer on the challenges of moving Catholic elementary schools from being staffed and led by religious to mirroring the secular leadership found in the vast majority of urban schools. Sisters in booming teaching congregations in the 1940s and 1950s led lives of frugality that had no parallel in any rectory; their convents at mission schools were often old, lacked basic amenities such as hot water or adequate insulation, and would, by today's standards, barely suffice as adequate group housing for children at a summer camp, let alone permanent all-weather residences for women of various ages, levels of physical fitness and who worked 18 hour days both teaching and serving their communities (p. 32). Sisters' ideology of sacrifice permeated their school cultures as well. Young Sister-teachers in urban schools often served the poorest families, including immigrants, children being raised by single parents due to death or abandonment, and children in racial or ethnic minorities that were marginalized in traditional public schools. The self-imposed invisibility: Habited, teaching large numbers of students with little initial training, and living as ascetics combined with the organizational structure of the Roman Catholic Church put Sisters and their school leadership in secondary position to a pastor, who was, by Canon law, the

head of the parish elementary school as an extension of his ministry. The 1983 Code of

Canon Law states,

> A pastor is obliged to make provision so that the word of God is
>
> proclaimed in its entirety to those living in the parish; for this reason, he is
>
> to take care that the lay members of the Christian faithful are instructed in
>
> the truths of the faith, especially by giving a homily on Sundays and holy
>
> days of obligation and by offering catechetical instruction. He is to foster
>
> works through which the spirit of the gospel is promoted, even in what
>
> pertains to social justice. He is to have particular care for the Catholic
>
> education of children and youth. He is to make every effort, even with the
>
> collaboration of the Christian faithful, so that the message of the gospel
>
> comes also to those who have ceased the practice of their religion or do
>
> not profess the true faith" (Can. 528 §1).

The office of pastor, having been conferred by the local bishop, automatically raises the

priest to whom it has been given to the position of head of his parish's school. In

considering this and related issues, Daly (1985) noted, "the reformed, democratized

church of the future" in post-Vatican II American dioceses never materialized in

fundamental ways for women religious, such as correctly identifying a Sister-principal as

the de facto school leader whose decisions had daily and long-term impact on her faculty

and students. Resistance to the kind of change that Sisters saw as essential to maintaining

school viability, Daly opined, reflected a general church attempt to oppress and

extinguish reform. In the heady days of the late 1960s, this included any number of

changes—elimination of the habit, branching out of Sister's ministries, or actively

planning for school transformation—to which church leadership as high as the Pope felt

excessive (p.142). At the local level, it was the Sister-led educational institutions that often drew pastoral scrutiny.

If a pastor was recalcitrant, unpredictable, and unwilling to support Sisters as decision makers, then school leadership became a constant battle of wills. As much time could be spent in negotiating for small changes as would take to implement the changes themselves. Pastors could allow children to enroll well after the start of the year, causing disruption to Sisters' classrooms, especially in light of limited resources including such basics as textbooks or, in some cases, having a sufficient number of desks and chairs (Caruso 2012, p.35). If a pastor, conversely, was not confident in his abilities to give guidance to a Sister-principal and her faculty, school growth could stagger because the religious community assigned to the parish was unable to trust clergy to understand both their mission and the students' best interests (p. 45). This included knowing when to defer to the Sisters when they determined it was time to include laity in staffing and, eventually, the principal's role. Reluctance of a pastor (or, in the case of Diocesan secondary schools, superintendents) to embrace lay professionals in leadership jeopardized the viability of Catholic schools in changing urban neighborhoods. Refusal of a pastor to acknowledge these demographic trends was disingenuous at best, short-sighted and misguided at worst.

Perhaps the most prolific researcher to bring a sense of urgency to the need for proactive yet contemplative transition planning for urban Catholic schools is Merylann Schuttloffel at The Catholic University of America. The majority of her work, both alone and in collaboration, urgently and persistently draws attention to the oncoming "storm" in urban Catholic school transition as the presence of dangerous markers for school closure, including governance and leadership issues, continue to emerge. No contemporary writer

has explored more facets of the impending administrative crises and the critical need for attentive strategies that create suitable organizational lineage for urban Catholic schools.

In her review of Mulligan (1998), Schuttloffel (2001) uses Mulligan's case study of the floundering of the Catholic school culture in Newfoundland as a call to arms for her American colleagues; historically, Newfoundland and other Canadian provinces had supported a school system which offered secular and Catholic options for all children. In 1997, Newfoundland voted to end the two-prong system, largely because the Catholic system could not, in Schuttloffel's words, "articulate[d] a significant purpose for maintaining the Catholic schools." (p. 426). If, Mulligan noted in his book, in a democratic process, an entire citizenry would willingly dismantle a religious school system that had served the province for over 130 years, no Catholic school in any Canadian province was safe. Relying on Catholic symbology, Mulligan notes that poor Catholic teacher (and by extension, leader) development is caused by a trinity of poverty: theological, educational and spiritual (p. 427). Correspondingly, Schuttloffel argued that the same fate could be true for Catholic schools in the United States. Without focused priorities, Schuttloffel opines, the demolishment of Catholic schools in favor of secular priorities is not limited to a small province in another country; the same fate is a risk in for every Catholic school in every American urban space.

In 2003, Schuttloffel revealed her findings from a commissioned study by the National Center for Research in Catholic Education at the National Catholic Educational Association (NCEA). Her methodology included "typical descriptive survey data" from superintendents of Catholic school systems. While the researcher noted the survey had a lower than desirable response rate—42%—the data came from a geographic cross-section of the United States and therefore offered some generalizable insights into the state of

principalship in Catholic contexts (p. 3). The most urgent message that is raised from the

study is that most lay principals did not have training and mentorship opportunities that

emphasized spirituality or theological issues—up to 95% of the hires from public

contexts lacked this type of distinctly Catholic foundational knowledge. In Catholic

schools, 75% of the population of principals are women (compared to 44% of public

school principals), which Schuttloffel notes is a marker of ongoing agency and authority

for women in the Church; it is the context of education which the female voice in

Catholic life is dominant, persuasive and vibrant (p. vi). However, where women are not

experiencing equity in authority is with compensation. No participant in the study

indicated that the salary and benefits for a Catholic school principal in their supervision

was competitive with that of their public school colleagues (p. 15). 58% of the principals

were lay married; only 22% were religious, indicating a disconnect and perhaps a gender

incongruity in how candidates for leadership are vetted; women are encouraged to discern

a call to administrative roles, but then not paid in concert with what their skills and

talents would fetch in other contexts. Since 2003, that 22% can only have decreased, so

how sponsored schools have filled those principal roles—including strategic planning for

compensation, an issue Schuttloffel's data plainly raises—is even more pressing.

In the final analysis of this large set of data, Schuttloffel recommends that

Catholic schools must take an approach of "growing" leaders from their own ranks

instead of relying on consultants to search for principals from the outside. Since a

persistent, problematic theme is retention, leadership needs to be cultivated from within

and with individuals, who use their education and skills to develop lifelong careers in

Catholic education, not merely use a principalship as a way station to another position.

Mentoring for novice principals is one of the most critical features of this intentional

cultivation, so encouraging early discernment of leadership—Schuttloffel suggests a type

of "principal formation institute," an idea taken directly from one of the participants (p.

11)—is of utmost importance. Finally, as communities with sponsored schools examine

their expectations for lay leadership, issues like gender equity in compensation must be

addressed. While raising the profile of women in the Church through educational

achievement and school administration roles is certainly important, wage equity is a

social justice concern that cannot be ignored. In order for leadership to remain focused,

deliberate and consistent, those lay professionals discerning the call should not be

expected to financially sustain themselves like the Sisters they are often replacing. Such

an ideology is simply incongruous with contemporary economic realities.

  The epigraph of DeFiore, Convey & Schuttloffel (2009)'s breakthrough analysis

of urban Catholic school stability is both Biblically metaphorical and contemporarily

prescient: "There will be no more prizes for predicting rain; only for building arks" (p.

v). The crisis itself, the researchers noted, was well understood. There are five themes

that persistently run through urban Catholic schools at risk for closure: finances,

governance, leadership, community and societal influences. Economic drivers and

operational concerns, such as physical plant inequity compared to better funded public

entities and inability to connect meaningfully with stakeholders, are frontrunners in

putting schools in harm's way. However, leadership difficulties—not only at the school

level, but within parishes and at the diocese—have critical influence on whether urban

Catholic schools can survive cultural and financial turbulence. In the face of the ongoing

loss of women religious as administrators, the laity are charged with creating and

communicating the essentialism of a Catholic school; the researchers emphasize

repeatedly "*that the right principal in a school does make a difference in a school's*

future" (authors' emphasis) (DeFiore et al., p. 19). Following their "building" metaphor, the team recommended six elemental features of viable Catholic schools: effective leadership, full enrollment, financial stability, high quality academics, Catholic identity and comprehensive strategic planning. While any one of these checklist items are singularly important, it is the wraparound packaging of all of them, working in concert, that propels an urban Catholic school towards sustainability. Naturally, a keen sensitivity to larger policy issues, including legislative initiatives and parish, state and federal funding limitations is also a powerful arbiter of school success. However, the model of Catholic identity in an urban Catholic school has not academic content or even Catholic culture at its core, but people and it is a principal who fosters the environment that allows identity to flourish (Schuttloffel, 1999, 2003). The researchers finish the monograph (and their metaphor) by recommending that stakeholders "join vigorously" (p. 41) in the effort to build an ark that carries the tradition of the urban Catholic school forward; that model must include appropriate planning to move leadership opportunities from sponsoring communities to lay administration.

Schuttloffel (2012) cut to the heart of the matter on which the proposed study is premised:

> There are numerous themes that . . . are relevant to American Catholic schooling. First is the diminished presence of teaching and leading vowed religious. Because of the dwindling numbers of religious actively present within Catholic schools, current staffs are further removed from direct experience with vowed religious and the significance of their charism... an additional contextual complication is that this teaching and leading population has experienced a poor theological knowledge base (p.151).

Identity and character in leadership is of utmost importance to Schuttloffel, and always

humming in her background is the refrain that many laity are not prepared to assume

leadership in schools without intensive development. They must understand the spiritual

context where they will attempt to practice their teaching and administrative talents, and

doing so will be difficult without personal involvement with the religious who have

historically filled those roles.

Schuttloffel's (2013) international qualitative research on contemplative practice

in England, the Netherlands and Australia focused on the metacognitive processes

necessary for principals to engage in reflection about decision making and analyzing

results. "Catholic decision making should be principled on the Gospel, theology and

tradition as well as participatory governance with stakeholders" (p. 83). Using a symbol

again so familiar to Catholic readers—the trinity—Schuttloffel notes that whereas current

Catholic leadership emphasizes instructional, managerial and spiritual leadership, the

contemplative model uses the tripartite organization of heart (beliefs and values), head

(knowledge and skills) and hand (the actor that integrates the first two) (Sergiovanni,

1992). A second tripartite layer of reflexivity included in the contemplative model is

premised on Van Manen's reflective process (1977), in which the technical, interpretive

and critical aspects of reflection—the what, the what does it mean, and the why are we

doing it this way—come to fruition. The intentionality with which a lay principal

embraces the contemplative model cannot waver; a religious for whom vocational

discernment has been a committed spiritual and professional process may have an easier

time with the model, but that doesn't mean that a secular leader shouldn't or cannot

aspire to embracing it fully as part of a lifelong professional investment. In Schuttloffel's

2013 study, one theme emerged as a forefront concern from the principals across all three

contexts: that the lack of religious in schools, and the eventual lack of teachers who were

taught by religious, is a challenge to faculty formation that every leader acknowledged as

particularly problematic (p. 96). A second theme is that lay leaders were raised in a far

less dogmatic Church than their predecessors and may not have feel the confidence in

their own spirituality to take on the principal role with the vibrancy and internal fortitude

of a professed Sister (or Brother). How outgoing Sisters prepare and support the

incoming laity in their inculcation into charism and Catholic identity is a fundamental

aspect of successful transition leadership plan. Schuttloffel recommends looking to Pope

Francis as a model of contemplative leadership, noting that younger school leaders may

find in his persona a comfortable ideal for successful Catholic organizational authority—

one of service, humility, collaboration and zeal for authentic acts that exemplify Gospel

values (p. 101).

When Schuttloffel's (2013) piece is read with reference to her 2003 study, it

becomes clear that she has been sounding the call to arms for a decade. It would be

untrue to allege that the conversation about how to utilize Sisters as wisdom figures in

preserving their own ministries through the integration of experienced, motivated,

invested lay workers has never occurred in Northeast Ohio; both Fischer and

Bartholomew (2010) and Fischer and Murphy (2012) have begun to explore how lay

workers' "proactive and collaborative efforts" to partner with religious can continue to

meet the needs of the marginalized and poor (Fischer & Bartholomew, 2010). However,

in terms of school leadership specifically, no deep investigation to explore Schuttloffel's

most persistent recommendations—careful cultivating of leadership from within,

encouraging a discernment process and mentoring program for novice leaders, ensuring

both the educational and spiritual preparedness for the principal's role—has yet taken

42

place in a large urban space like Northeast Ohio, a community with incredibly strong ties

to both Catholicism and educational opportunities and excellence. How the schools

sponsored by the women religious Schuttloffel (2003) acknowledges as the dominant

force in Catholic educational leadership have prepared for their lay leadership transition

and ultimate sustainability of their schools is the focus of the proposed study. It will

extend Schuttloffel's work, add to the body of knowledge about this idiosyncratic

leadership role in urban schools, and provide guidance to other educational and service

organizations that need to purposely plan leadership transitions using carefully gleaned

qualitative data from the voices of faith-filled experience.

CHAPTER III

METHODOLOGY

Do not lose courage, then, if you feel yourselves incapable of knowing and

doing all that such a special charge demands (St. Angela Merici).

Introduction and Rationale for Qualitative Research

Research on urban Catholic schools is, while not overwhelmingly popular with

scholars, at least a consistent source of educational interest. In recent years, researchers

have focused on leadership models in urban schools (Elmore, 2000; Ferguson et al, 2010;

Wager et al, 2005), leadership models in urban Catholic schools (Deenamonde, 2012;

Morris, 2000; Traviss, 2001), transition and turnaround in urban schools (Duke &

Jacobson, 2011; Fullan, 2006; Leithwood, Harris, & Strauss, 2010; Pappano, 2010), and

transition and turnaround in urban Catholic schools (Thielman, 2012). It was Traviss

(2001) who observed that in all the major studies on Catholic schools starting in 1970

(Buetow) very little emphasis was placed on the function of the principal; she believed

that

> the researchers may have assumed that in an investigation of the numerous
>
> aspects of the school—quality of instruction, academic organization and
>
> curriculum, the role of the faculty, health of student life, place and

contribution of extracurricular activities, spiritual and moral climate, and

morale—the reliance on the principal and his or her support staff is

understood. All school studies, could, in one sense, be reduced to an

investigation of the principal (p. 99).

Other studies have explored specifically how women's leadership in Catholic schools

settings differs from men's (Andronovien, 2013), the role, professionalization and

influence of teachers in Catholic schools (Coll, 2006; Cook & Hudson, 2006; D'Souza,

2002) and how continuing education is essential for effective leadership in Catholic

schools to emerge authentically (Buchanan, 2013). Women religious themselves have

reflected on how communities organize themselves through leadership (Schuster, 2012);

they have also written case studies about specific school leaders' tenure during

challenging times of growth and change (Caspar & Graham, 2006). The historical case

study method, which will be explored later in this chapter, has been used effectively to

create portraiture of principals and archive their decisions, challenges and philosophies.

It was Lipsitz (1984), Viall (1986), and Jacobs (1998a, 1998b, 1998c, 1998d)

however, who first articulated the idea of "purposing" in a school leader; that is, that a

principal in a Catholic school consciously embraces the purpose of the school as focusing

on a core mission and has the ability to translate that mission into a vision that manifests

itself in tangible, observable, concrete activities. Out of her 17 conclusions about

effective schools, Lipsitz (1984) put the principal as the center of that efficacy in 9,

including "level of caring" (p.181) and "staff and students made to feel like chosen

people" (p. 172). These activities exemplify the identity of the school as a symbol of the

values that inspired its founding, often by a community of women (or men) religious.

Acknowledging the fast changing persona of the Catholic school leader, Schuttloffel (1999) urgently noted,

> "The threat posed by the loss of the religious sisters and brothers who staffed Catholic schools during previous generations is something that can be dealt with... those charged with educational leadership... must be prepared to communicate the nature and purpose of Catholic schooling and to lead others to reflect upon the fundamental purposes that give life to and lead this apostolate" (p. ix).

As the population of active women religious in this area of the country rapidly diminishes, their methods, ideologies and reflections should be preserved not only in the interest of historicity but in proactive planning for future stakeholders of these schools—students, parents, the city, other remaining religious congregations.

Purpose of the Study

The purpose of this historical case study was to explore and document, through the lenses of constructivism and knowledge transfer, the leadership process of one congregation of women religious in Northeast Ohio urban schools as well as their roles in attempting to successfully move their schools toward lay principals and administration. This methodology chapter not only justified the choice of qualitative design, but to also provided for the reader the detailed procedures necessary to ethically conduct a study using an established qualitative approach. The interpretive framework – constructivism and the theoretical framework, knowledge transfer as described by Collins and Allender (2013), form a support structure through and by which the research questions can be addressed. Case study (Creswell, 2013; Stake, 2006) is explained and defended as the

best choice for this particular study; here, there will be an exploration of how the researcher made choices about what type of case study to employ. Accordingly, the case community is described with particular attention to its relevance in addressing the research questions. Every part of the data collection method—from the selection and justification of the participants to the development of research questions to the foundational means of establishing trustworthiness, credibility and rigor through data analysis—is presented in detail, including the limitations of this study. The methodology chapter addresses critical factors related to best practice in qualitative research design and execution and sets the tone for the strength of the study as well as its role in advancing knowledge about the subject.

Research Questions

In this study, the researcher and the participants in the case endeavored to construct a series of insights into possible answers to the following questions:

1. How did the Sister-educators in urban schools who were called to the principal's role prepare themselves for leadership?

2. When it became clear that the future of their urban school depended on transitioning to lay leadership, how did Sister-principals prepare both their religious communities and their school communities for that change?

Interpretive Framework

The interpretive framework for this study, constructivism, was a posture that was both idiographic and emic (Morrow, 2005); meaning and knowledge are built from analyzing patterns and themes in the experiences of a few "insider" individuals. To accomplish this task, the emic insider collaborated with the etic outsider in order for

47

knowledge to emerge as a holistic, unified entity. The dualism of the teller-listener

relationship adds stability to the emic story by lessening the possibility that a perfected

autobiography is being advanced as the lone truthful narrative. Following the models of

Guba and Lincoln (1994), Bruner (2004) and Ponteretto (2005), the researcher, a

postmodernist, accepts that reality is constructed by the lived experiences of individuals.

Assumptions

Certain assumptions are factored in the constructivist process. These were

itemized by Creswell (2013) in his analysis of interpretive frameworks:

1. *Ontological beliefs* assert the nature of reality. The participants in this

   case study have, through experiential and reflective learning, created

   realities about their teaching, religious vocation, leadership models and

   other issues related to their principalships. These realities are dynamic,

   multiple, and can be evidenced through participants' words and the themes

   that emerge through the researcher's analysis (p. 20).

2. *Epistemological beliefs* explore how reality is known and what counts as

   knowledge (p. 21). The researcher and the participants from the case will

   co-construct their shared understanding of leadership models in urban

   Catholic school settings. They will also explore the preparation narratives

   that emerge when leadership transition in urban Catholic schools became

   necessary.

3. *Axiological beliefs* establish the role of values and how the researcher

   positions herself within the study. It was essential to develop an

   understanding of the values of each individual participant in the case with

48

regard to her professional and vocational growth. It was critical to explore

how these women negotiated their values in the multiple spaces they

served: their congregation, their schools, and their larger urban

community (p. 21).

4.   *Methodological beliefs* outline the process of research (Creswell, 2013; p.

21).

The researcher scrutinized the context (Stake, 2000) of the case in order to facilitate an

understanding of the larger question: How do women religious, dwindling in number,

plan for the leadership of their sponsored schools to a laity that may not be able to share

in the fullness of charism, the integration of community life? The researcher used richly

detailed language in order to capture the nuances of each participant's story. In doing so,

the researcher promoted transparency in the study by endeavoring to present with

veracity each participant's narrative.

Theoretical Framework

The theoretical framework for this study was knowledge transfer as used by

Collins and Allender (2013). In this paradigm, there was a strong connection between the

origination sites (contexts) of creativity and innovation and the emergence of related

iterations at other times and/or in other settings. Intellectual transmission was not the

only element that was valued in knowledge transfer; cultural identifiers were also part of

the landscape. Whereas other researchers have used knowledge transfer to explore how

Eastern ethnic identities are gazed upon by Western (O)thers (Chia, 2013) or how

patriotism and fidelity to a colonial power was expressed by those in the colonized

country (Brewis, 2013), the researcher in this study used the lens of knowledge transfer to

explain how intellectual and cultural identifiers of the religious community are transmitted to laity who serve in the community's schools. These identifiers can consist of traditions, beliefs, leadership values and styles, or models that contribute to the community's collective social identity and spiritual foundation. The transmission of these artifacts is a critical enterprise for urban Catholic schools, since the personal involvement of women religious in these educational settings is growing less over time. Careful transition planning for the continuation of these markers as fixed points in the dynamic lives of urban Catholic schools is essential if the communities desire these institutions to be representatives in the future of the women that founded them in the past.

Methodological Design

In choosing a qualitative approach for this project, the researcher sought a method that would respect the culture of idiosyncratic groups while providing a means by which she could explore, through deep analysis, a particular set of experiences of the members of those groups. Qualitative research emerged as appropriate because the researcher asked how/why questions, which Yin (1994) posits are best answered in a qualitative manner, specifically case study. A case study fit best for this study because the researcher had very little control over the present variables in her area of study (leadership issues in contemporary urban Catholic education) and because she wanted to get as close as she could to her participants and their process (Merriam, 2009). Merriam (2009) further observes that "a case study might be selected for its very uniqueness, for what it can reveal about a phenomenon, knowledge we would not otherwise have access to" (p. 33). Teaching orders of Catholic women religious are historically unique even within a distinctive religious tradition and focusing on just one aspect of their work—

school leadership—offers another way to understand their role in the educational landscape of urban schools. Stake (2005) noted that cases are in and of themselves of interest. There is a mythos that surrounds, at least, the American Catholic perception of "nun"; their life choices, organizational strategies, and occupations—even their clothing and names—have been the subject of social interest for decades both within and without the Catholic community. Using case study to discover a previously unexplored aspect of Sisters' work, then, is an appropriate fit; religious communities are cultural entities unto themselves and decisions are by nature group, not individually, driven (Marshall & Rossman, 2010).

Ellet (2007) notes that case study method is heuristic; that is, it is in itself analytical and a means of discovery about a concept, event or happening, or observable experience. It is also a structural framework that allows a researcher the written means of communicating to a reader in language the critical elements of the thing being analyzed. The reader brings her own critical skills to the case and can make inferences and draw conclusions about it. The historical educational case study, which can be useful for focusing on the development of personnel and organizational changes in a setting (Bogdan & Biklen, 1992), would be most useful for the study design. Borden and Biklen's (1992) discussion of tracing the changes in a school context—"you might do a study... how it came into being, what its first year was like, what changes occurred over time, what it is like now (if it is still operating), or how it came to close (if it did)" (p. 62), mirrors the purpose of the study since the intent was to trace the changes in school leadership in much the same way (how the leader discerned her call, what her years of leadership service were like and what models she followed, what changes occurred over

time to her practice, what her school is like now). Merriam (2009), stated historical case

studies are by nature descriptive presenting both "a detailed account of the phenomenon

under study" (p. 38); and useful in presenting basic information about areas of education

where little research has been conducted. Coupled with the inability of the researcher not

being able to find more than one community willing and able to serve as a case, the single

historical case study best fit the design.

Sampling Method

  Participants. As previously noted, a study of this type necessitated a unique,

almost special sample. The idiosyncratic experiences, age and possible infirmity of

women religious who have served as school leaders in urban Catholic schools meant that

only purposeful (Patton, 2002) or criterion-based selection (LeCompte & Schensul 1999;

Palinkas, et al 2015) sampling will suffice. Purposeful sampling, Patton notes,

> is one of the core distinguishing elements of qualitative inquiry... the logic
>
> and power of purposeful sampling lies in selecting information-rich cases
>
> for study in depth? Information-rich cases are those from which one can
>
> learn a great deal about issues of central importance to the purpose of the
>
> inquiry, thus the term purposeful sampling. (p. 272-273).

Patton further noted that "studying information-rich cases yields insights and in-depth

understanding rather than empirical generalizations" (2002, p. 273). Even though

collateral actors (supervising priests, religious school superintendents, and former

students) can speak to some aspects of women religious as principals, only the women

religious themselves can truly illuminate that process and lived experience for outsiders.

52

Criterion-based selection is, as Palinkas et al (2015) note, "a sample based on similarity and is identified based on a pre-determined list of requirements" (p. 535). Further isolating the elements of this type of selection, the researcher identified for this study

> Criterion-i sampling, as a purposeful sampling strategy... study
>
> participants are... selected based on the assumption that they possess
>
> knowledge and experience with the phenomenon of interest... and thus
>
> will be able to provide information that is both detailed (depth) and
>
> generalizable (breadth) (p. 539).

Further, Palinkas et al. (2015) advise,

> It should be kept in mind that all sampling procedures... are designed to
>
> capture elements of both similarity and differences, of both centrality and
>
> dispersion, because both elements are essential to the task of generating
>
> new knowledge through the processes of comparison and contrast (p. 542).

In this study, the researcher determined that the first level of criteria for the sample had to consist of female Roman Catholic Sisters who served or who were serving as principals. The second level for participants' selection was that they served as a teacher prior to serving in school leadership. The experience of moving from the classroom to administration was critical to completing the "call to leadership" question in this study. The final level for selection of participants was that that the schools they served in be situated in an urban context.

In order to connect with communities, the researcher identified orders that sponsored schools in urban areas in Northeast Ohio. Information about them was

obtained from a general web search. An informal email of personal introduction was sent

to seven teaching communities on December 10, 2015 (see Appendix A). Only after the

study was approved by the IRB and determined that a Sister within the community met

the criteria for the study that a Sister was asked to participate in the study and presented

with the IRB-approved Informed Consent document (see Appendix C). This document

specified the time commitment for the study, an outlined the research and interview

questions, and the contact information of the researcher and her Chair at Cleveland State

University.

In this study, complete confidentiality was not possible, since the design of

qualitative research requires the researcher to have at least a professional relationship

with the participants; they met personally to talk, not merely answer questions on an

anonymous questionnaire. However, participants' confidentiality was maintained in the

study via a coding schema. The Sisters were given pseudonyms of their choosing.

Personal identifying information was kept as confidential as possible, except where there

is objective historical relevance in the details (for example, the college or university a

Sister attended which influenced her development as a school leader). The community

was also be coded with a pseudonym in order to protect participants that were unsure or

unable to provide candid insights into their experiences because of perceived and real

obligations to various stakeholders. No direct quotes from any official document were

used. To ensure fidelity the stringent ethical demands of the IRB to protect participant

confidentiality, the master list of participants, communities and corresponding

pseudonyms, all research notes and transcriptions, and the participant recordings on

minidisk was kept in a separate file in the office of Dr. Marius Boboc, Julka Hall 378,

Cleveland State University and will be destroyed three years after the completion of the study.

Data collection. The primary data source for this study was the interview, specifically semi-structured interview (Galletta, 2013). Semi-structured interviews "incorporate both open-ended and more theoretically driven questions" (p. 45), mining data that is both connected to the lived experience of the participant and the "constructs in the particular discipline" in which the research is situated (p. 45). Here, the stories of the participants were retrieved and coded and then analyzed with respect to the body of extract literature on this subject. The theory did not force the probing questions or the resultant coding; the researcher was, as Galletta (2013) noted, "attentive to what is unfolding between themselves [sic] and their participants" (p. 108). Being emotionally present in the semi-structured interview and following where the participant's story went naturally honors both the authenticity of the research process and the individual value of the life under examination. The researcher selected as many participants as necessary to reach saturation. Saturation is the point at which no new data—no novel ideas, themes, or large concepts or constructs—are collected (Corbin & Strauss, 2008).

In this study, the questions followed Galletta's semi-structured model of *opening segment* (establish participant rights, lay down broad questions that give participants an open door through which to walk and offer stories, start the probing process), *middle segment* (offer questions of greater specificity, explore responses already offered, deepen the probes and start to clarify meaning) and *concluding segment* (ask participant to reflect on more theoretical postures, highlight and explore contradictions, and express gratitude for the participant's role in advancing research) (pp. 47-52). While a specific set of

55

standard questions were prepared, a rich, detailed data collection came to fruition based on contemporaneous follow-up questions during the interview itself (Marshall & Rossman, 2011). Siedman (2013) posits that interviewing allows researchers the means by which to understand social abstractions; in this case, Catholic school leadership is the intangible entity under study. The lived experiences of those women who spent a portion of their professional lives in this role are the best means by which useful data about this role—this calling—can be obtained. Secondary data sources for this study included, but not be limited to, personal documents provided by the participants and historical documents. A query was posed to the community archivist for access to materials that rounded out the data collection, provided triangulation, and refreshed the recollections of participants on specific events.

The interview questions were available to each participant with the informed consent document in an effort to give her an opportunity to reflect meaningfully upon them prior to meeting with the researcher. The goal of this preparatory practice was to shape the interview accordingly and keep both researcher and participant attuned to the research questions (Collins, 2005). Galletta's (2013) three-stage interview model allowed for probing questions to emerge naturally during the course of the structured portions of the conversation between researcher and participant. Given the age and health constraints of the participants, and to prevent any one Sister from having to sit too long for an interview, a multiple-interview design was offered to protect participants from fatigue.

The first interview was designed to be no more than 60-90 minutes in length. Each Sister was presented with the consent document and had an opportunity to ask

questions about the consent document and the process of collecting data, or any other question about the study. Once consent was received from the Sister for having the interview recorded, it was done so with a Zoom H2n Handy digital recorder. The researcher made handwritten notes during the interview process with a LiveScribe3 pen and accompanying notebook, the technology of which allowed the researcher to quickly turn her notes into Word documents in her iPad with the LiveScribe app. These were included as part of the research file for the study and aid in analysis and clarify the transcription. As a backup in the event of a Zoom failure, the LiveScribe3 pen was an available substituted for a recorder as well as a writing instrument.

After each interview was completed, the researcher was responsible for creating her own transcriptions of the recordings according to Braun & Clarke's (2013) protocol for a verbatim audio transcription notation system; this way the researcher was able to signal to a reader what was said and by whom during each interview. The researcher used a MacBook Air to create text documents of each interview. Her LiveScribe notes supplemented the texts. After the transcription of each interview was completed, participants were asked for one short (no more than 60 minute) follow-up interview as needed, either in person, through email, or by phone call, to clarify any points of confusion or to deepen an understanding of a certain point made in the initial meeting. Amendments, if any, to transcripts were made by the researcher.

Member checking, first advanced by Lincoln & Guba (1985), is when the completed transcript is presented back to the participant to check for errors and ensure authenticity. The analysis of the transcript is not included in this presentation; as Morse (2015) noted,

If the participant does not agree with the analysis, this must place the

researcher in an awkward position . . . if the participant does not think the

analysis is right, what does the investigator do? Change the text to

whatever the participant thinks it should be? ...The researcher's

background in theory and research methods must outrank the participant

as a judge of the analysis (p. 1216).

However, "prolonged engagement, persistent observation, and thick, rich description" (p.

1214), which Morse notes are interdependent skills of the researcher to saturate the data

set with deep, reflective data analysis will be included as essential to build the

trustworthiness and rigor of the study.

Site selection. The researcher met the participants at a site convenient to them.

In cases where participant moved outside of the Northeast Ohio area and the researcher's

travel to him/her was prohibitive in time or expense, a telephonic or video (FaceTime or

Skype) call was the alternative data collection method. The researcher secured a

permission letter from the community in order to conduct research on their site and this

document is included as Appendix D.

Data Analysis

Trustworthiness and credibility. Braun and Clarke (2013) noted that

triangulation, where at least two methods of data collection are used to validate a third, is

a commonly accepted means of establishing validity in qualitative research. Denzin

(1970) first promoted triangulation as a qualitative method, although the concept is an

ancient one in mathematics. In her critical analysis of triangulation, Morse (2015) wrote,

"this process increases scope or depth of the study, because different sets of data or

different qualitative methods may each elicit different data, different participants, or perspective" (p. 1216). In the proposed study, triangulation will be coordinated through the three axes of interview, document examination and the interconnected triad of prolonged eengagement, persistent observation, and thick, rich description (Denzin, 2012; Morse, 2015). Triangulation ensures fidelity to the essential elements of case study approach, since case study is a means of discovering deeply what distinguishes the case under review from others even in the same profession, vocation or setting.

One of the foundational aspects for Catholics as they prepare for the Sacrament of Confession is the "examination of the conscience" in which those seeking penance engage in "prayerful self-reflection on our words and deeds in the light of the Gospel to determine how we may have sinned" (Catechism, 1994). Preparing a solid examination adds to the credibility and authenticity of the confession. In this study, the credibility and authenticity of the analysis was enhanced in a similar written "conscience examination" by the researcher through preparation of analytic memos using Day One journaling software on a MacBook Air; archived according to date. Saldana (2013) encourages this type of journaling as part of "the entire process and products of creating data about the data in the form of codes, categories, analytic memos, and graphical summaries" (p. 17). Analytic memos, which Saldana (p. 41) calls "somewhat comparable to researcher journal entries or blogs... memos are sites of conversation with ourselves about our data" (*citing* Clarke, 2005, p. 202) can be used to cognitively work out analysis questions, ensure a clean audit trail, and help the researcher understand through multiple writings how best to describe and communicate the participants' data to a reader. During the analysis process, the researchers used thick description in creating narratives from the

data provided by participants in interview as well as engaged in critical friend review on drafts with members of the researcher's committee (Hays & Singh, 2012; Morrow, 2005). Costa and Kallick (1993) defines critical friend "as a person (or persons) recruited to fulfill the role of a trusted person who asks provocative questions, clarifies ideas, advocates for the success of the work, and offers a critique of a person's work" (p. 49). Critical friendships share five elements: Clarity, listening, prudence in offering value judgments, responsiveness and advocacy (p. 50). Appleton (2011) extended that model by emphasizing the reflexivity and trust of the critical friend relationship (p. 3-4), especially when one is concerned about preserving integrity in a research study. Through individual reflective work as well as spirited collaboration with others, the researcher honored the seriousness of not only the work of the participants but also the way in which its value is communicated to the audience.

Coding and the choice of analytical software. A guiding principle of the data analysis in this study was the constant comparative method first described by Glaser (1965), extended by O'Connor, Netting and Thomas (2008), and broadened further by Fram (2013). Constant comparative is not, per se, a research design; rather, it is an analysis method which ensures that qualitative data in any data set (in this case, from this study) is compared to similar data collected in a previous study (or studies). The continuous process of reviewing previously analyzed data enhances and explores the new data in an active, reflective way (Fram, 2013, p.2). For this context, the reflexivity of constant comparative is a natural fit for case study when compared to other case studies. A text that contained a good previously collected data set on Sisters in school leadership was in Caruso (2012), wherein the author addressed the loss of teaching Sisters in urban

60

Catholic schools. Initial raw coding of the newly collected data emerged out of the constant comparative method and led into the more specific NVivo analysis.

The researcher utilized NVivo 10 Qualitative Analysis Program for Mac software on a MacBook Air to code the qualitative data for trends and themes. Bazeley (2013) notes that "coding is a fundamental skill for qualitative analysis... it is a tool for querying data, for testing assumptions and conclusions" (p. 125). Coding typically follows a two-stage pattern: first-level (or initial, or open coding) and second-level, during which time the more analytical codes emerge (Saldana, 2013). Since one key purpose of coding is to label and find data quickly, coding data well "leads you from the data to the idea and from the idea to all the data pertaining to that idea" (Morse & Richards, 2002). This allows data to be seen holistically or, in the alternative, "fracturing data, breaking data up... once coded, data look different, as they are seen and heard through the category rather than the research event." (p. 115). As data is re-visioned, then, it can be viewed not only in its original context but in new contexts (Bazeley, 2013). NVivo was chosen because of its flexibility; Bazeley & Jackson (2013) noted that it can help a researcher "rewrite, recode, reorder, reconfigure, redefine, revamp and reframe as necessary" (p. 47) with one cautionary tale: that the software follows, not leads, the researcher. Because of the researcher's need to be able to build knowledge through the coding process, the flexibility of NVivo was essential.

The data record of the participant's own language was the basis of NVivo coding (Strauss, 1987), which was the first-level coding for this study. It was critical to capture not only the words but the word choices of women who have lived lives shared by their community's charism, their teaching and leadership experiences, and their faith—how the

participants are the very embodiments of the case in which they live and to which they have devoted their lives. It was also, as Saldana notes, "to provide imagery, symbols, and metaphors for rich category, theme and concept development" (2013) that added to the fullness of the researcher's analysis. Both Merriam (1998) and Stake (1995) noted the power of NVivo coding in case study; through their words the participants will advance, define and enhance the reader's experience of the case.

The second stage used pattern coding to coalesce smaller units of analysis into meta-codes (Miles & Huberman, 1994), which further exemplified the "best fit" codes for this study (Saldana, 2013). Pattern coding was appropriate for "development of major themes from the data" (p. 210) or, "examining social networks and patterns of human relationships." Since education is one of what the researcher terms "human sciences," where method and theory are applied to analyze a construct (in this case, policies about educational leadership), pattern coding was a good fit in this context. Additionally, by and through the researcher's careful analytic memo writing, the pattern coding became perfected and provided the reader opportunity to have a fuller understanding of what meta-codes are important in relation to the research questions.

Researcher as instrument. This study evolved from a series of other studies into the history and ethnography of Catholic education in Cleveland, Ohio. The researcher had the great fortune and privilege of attending Catholic schools and experienced, at least through curricula and culture, the charism of several communities of religious women. An ongoing interest in Ohio and educational history encouraged and influenced by historians Frank Vazzano, Ph.D. and David Wallace Adams, Ed.D, combined with an archivist's mindset towards the aging population of American women religious spurred

the thought: What will happen to Catholic schools when the last nun passes into eternity? How have Sisters planned for the perpetuity of their missions through educational institutions? What influence did the religious community—the case—have on its school leaders, the principals, who made decisions for the future of its schools? Perhaps most significantly, what can other educators learn from the models of leadership that Sisters have successfully used in their schools since the first women religious arrived on this continent in the late 1700s? In this study, hopefully some aspects of all these questions were answered by the participants and the research revealed some salient codes that can be used for future explorations into urban religious educational leadership.

One limitation of this study was that it examined the stories and perspectives from only one community, and the sample is one of convenience. Initially, the researcher had a multi-case design in mind. When it became apparent during the planning stages that such a design would not be feasible given the finite resources available (time, population), the researcher altered the plan. It would certainly be more representative of women religious in urban education if more than one community could be analyzed, and the researcher not only encourages this type of study but would like to do one herself.

Summary

There was an element of generalizability in this study, since what can be learned about leadership in education from women religious may have relevance to other educational contexts and human service organizations. There was also a "snapshot" element as well, since the sweeping imagery of Catholic Sisters in habit, standing shoulder to shoulder, their uniformed charges filling the classrooms of parish schools in America's great cities—in this case, the cities of Northeast Ohio—is a cultural memory.

It will never happen again. Recording how a religious community influenced its

members in school leadership, how the school leader responded to her Sisters and outside

stakeholders, was part of the stewardship of an educational historian. The researcher

believes she is as much protecting knowledge as advancing it.

CHAPTER IV

FINDINGS

Strive to be faithful to that which God has called you. —St. Angela Merici

Introduction

The participants, who all belong to the same Roman Catholic religious

community or "case," shared their vocation stories and their reflections on their spiritual

development in interview with the researcher over several months in the autumn of 2016.

The Sisters also contemplated their understanding of their own professional growth over

time as education professionals, first in teaching and then in leadership. They compared

contemporary best practices in educational administration with those their community

had historically employed and offered their opinions on how Catholic school leadership

had evolved since the 1960s, when five out of the six participants joined their

community, completed their vocational and professional preparation, and began working

as educators in urban schools. They offered their opinions on working with pastors and

the challenges of leading high-poverty schools. They also described the social,

educational and philosophical adjustments necessary in schools where the Catholicity of

students waned as the city's demographics changed and political structures, such as the

Cleveland voucher program (EdChoice) became available. They also considered what

their legacies to Catholic education in Cleveland might be. In this chapter, the themes that emerged from these stories and the themes' relationships to one another will be explored; additionally, the coding processes that the researcher used with NVivo10 software will be explained for the reader. The data then will be viewed through the lens of knowledge transfer (Collins & Allender, 2013), the theoretical framework for this study, as well as constructivism (Morrow, 2005), the interpretive framework for the study. Finally, in the last section of the chapter, the research questions for this study will be answered. They were as follows:

1. How did the Sister-educators from one community in Northeast Ohio who were called to the principal's role prepare themselves for leadership?

2. When it became clear that the future of their urban school depended on transitioning to lay leadership, how did Sister-principals prepare their religious communities and their school communities for that change?

Participants

The community in this historical case study is one of the oldest continuously extant organizations of Roman Catholic women religious in the United States. Conversationally, the Sisters in this study referred to themselves and each other as "Sister" but when talking about large groups of Sisters they often used the word "religious." The United States Conference of Catholic Bishops (2017) defines "woman/women religious" as

> ...through her vows, a Sister respond with her whole life to God's
>
> invitation to love Him completely and without reserve. This free response

is a fuller expression of her baptismal call and is, for one who is genuinely

called to the consecrated life, a means to greater holiness.

Steeped in the tradition of both its patron saint and its foundress, the women in this

community strive to exemplify the charismatic elements of their Rule through their lives.

These elements include the deliberate marriage of "contemplation and action," the

advancement of social justice, and the extending of compassion and hospitality to all

persons. The education of young people is but one of the ministries in which this

community finds itself in service; Sisters engage in missionary work abroad, healthcare,

social work, and serve in all sectors of society where poverty and marginalization run

unchecked. This community's commitment to urban education in Cleveland at all levels

(elementary, secondary, and postsecondary) has been unwavering. Sisters continue to

serve as tutors, teachers, principals and presidents of both sponsored educational

institutions and collaboratively staffed institutions where this community shares teaching

and administrative responsibilities with Sisters from other orders. They also work closely

with experienced laypeople that support and advance the mission of this community and

actively support the women religious who embody its charism.

For this study, six (6) white non-Hispanic women religious from this community,

each of whom had served or were serving as a principal in an urban Catholic school, were

interviewed between September and December, 2016. They ranged in age from 33 to 72.

Most of the participants had celebrated their 50th year anniversary, commonly referred to

as a "Jubilee," as Sisters in that community. Sister Therese, the youngest member of this

sample, is also the youngest member of the community. She has been a Professed Sister

for five years. The participants reside with other Sisters in the greater Cleveland area

either at or a short driving distance from their Motherhouse. Some are housed at local

parishes or in private rented homes near their missions. All of them continue to work;

two have part-time positions in local schools while the rest remain employed full time in

various educational and social service institutions in Cleveland. All of them have

contemplated what the role of lay professionals should be in sponsored institutions,

especially as lay professionals exclusively move into leadership at these types of schools.

None of them had participated in a research study such as this one previously, although

several of them expressed relief that their stories were being collected "while I can still

remember everything, including my own name," as Sister Joan ruefully noted. They

were interviewed separately in their homes or at their Motherhouse for approximately 90-

120 minutes each. They each reviewed their own transcript for member checking

(Lincoln and Guba, 1985) after the document was typed and had an opportunity to offer

corrections or ask for redactions.

In this chapter, demographic information about the case community's participants

will be presented first, followed by an explanation of how each research question was

coded (including coding choice) and analyzed. Tables showing the deconstruction and

reconstruction of data are provided for the reader as well as extended description and

analysis of themes that emerged from each coding and analysis process. Finally, the

research questions for the study will be answered.

Table 1.

Demographic Information on Study Participants

Name	Years in community	Highest education level completed	Experience as principal (school level)	Currently working Full or Part Time	Currently working in ministries besides teaching	Teaching experience (grade level)
Therese	10	Masters	K-8	Full-time	N	9-12
Joan	50+	Masters	9-12	Part-time	N	9-12
Beth	50+	Masters	K-8	Full-time	Y	K-8
Mary Jane	50+	Masters	K-8	Full-time	Y	K-8
Angela	50+	Masters	K-8	Part-time	N	K-8
Erin Brown	50+	Masters	K-8	Full-time	Y	9-12

Coding and Analysis: Research Question #1

How did the Sister-educators from one community in Northeast Ohio who were called to the principal's role prepare themselves for leadership?

After the participants approved the accuracy of their transcript through member checking, the researcher analyzed each transcription separately using NVivo 10 software. For the first round of analyses, the researcher employed NVivo coding (Strauss, 1987), which is best described as a record of the participant's own language. NVivo coding was used to deconstruct the transcript of each interview so that commonalities in units of language (codes) among them could be isolated for future comparison and contrast.

69

Doing so yielded several codes which, in small units, appeared frequently, but not every one of these codes was common to all interviews and some were more "weighty" than others in their presence and persistence. NVivo 10 software revealed which of these micro-codes were more substantive in depth, breadth and/or frequency.

Table 2.

First Level NVivo Coding For Research Question #1

Code (1st cycle)	Subcode 1	Subcode 2	Subcode 3
Discernment	In vocation	In teaching	Open; loving
Love	For Sisters	For Students	For all people
Identity	As a community member	Clothes	Name
Community Influence	Traditional (historically)	Modern (cooperative)	Love; hospitality
Leadership qualities	Love	Catholicity	Advancing the mission
Relationships	With pastors	With students	With faculty and others
Preparation for leadership	Obedience	Mentor	Community
Justice	Love		

Code (1st cycle)	Subcode 1	Subcode 2	Subcode 3
Prayer	Obedience		
Charism	Spirituality	Tied to identity as — community member	Gift
Mission	Of community	Of a school	Of Sister as an agent of community
Values	Of a Catholic education	Of the gifts of the community	Love

After these codes had been identified, the researcher employed pattern coding (Miles &
Huberman, 1994) to organize the codes into meta-codes.   Some of the codes could fit
into two categories: e.g. "with pastors" referenced both *love* and *values*; "obedience"
referenced both *discernment* and *community influence;* "gift" and "charism as it tied to
identity" referenced both *identity* and *community influence*; and, finally, "Catholicity"
and "Catholic education" referenced both *identity* and *values*. Other codes, such as love,
stood frequently and singularly with ample power in the data. Five final meta-codes
emerged—love, discernment, identity, community influence and values. These formed
the basis of the answer to the first research question.

Table 3.

Second Level Pattern Coding for Research Question #1

Code (1st cycle)	Subcode 1	Subcode 2	Subcode 3	Pattern code (2nd cycle)
Discernment	In vocation	In teaching	Open; loving	Discernment
Love	For Sisters	For Students	For all people	Love
Identity	As a community member	Clothes	Name	Identity
Community Influence	Traditional (historically)	Modern (cooperative)	Love; hospitality	Community Influence
Leadership qualities	Love	Catholicity	Advancing the mission	Values
Relationships	With pastors	With students	With faculty and others	
Preparation for leadership	Obedience	Mentor	Community	
Justice	Love			
Prayer	Obedience	Love		
Charism	Spirituality	Tied to identity as — community member	Gift	

Code (1st cycle)	Subcode 1	Subcode 2	Subcode 3	Pattern code (2nd cycle)
Mission	Of community	Of a school	Of Sister as an agent of community	
Values	Of a Catholic education	Of the gifts of the community	Love	

Coding and Analysis: Research Question #2

When it became clear that the future of their urban school depended on transitioning to lay leadership, how did Sister-principals prepare their religious communities and their school communities for that change?

In order to organize the data to reveal potential answers for the second research question, the researcher took the codes found with the original NVivo coding from the first research question and applied to them axial coding (Miles & Huberman, 1994; Patton, 1990; Strauss & Corbin, 1998). Axial coding came out of grounded theory as a means by which categories of data could be connected together. Axial coding was chosen because the first round of NVivo and then pattern coding deconstructed the data, a necessary step for answering the first research question. "Reassembling" the disassembled data, then, was essential to capturing a snapshot of the big picture. (Saldana, 2013, p. 218). Since axial coding can be used to group first level codes into concepts, this approach fit the data better than other coding choices available. Additionally, axial coding addresses four elements critical to this study: context (urban

Catholic schools), conditions (leadership in transition), interactions (between religious and lay leadership) and consequences (the results of leadership transition if it goes well or, unfortunately, if it goes poorly) (Boeije, 2010; Richards, 2009). Finally, axial coding is useful to advance a theory, and when a theory and model of Catholic educational leadership in transition started to emerge from the data, axial coding provided the means by which a model could be explained to the reader.

Table 4.

Second Level Axial Coding for Research Question #2

Love	Faith Filled	Magnanimity	Mentor	Mission
Open; loving	Catholicity	Identity (name, clothes)	In teaching	In vocation
Love; hospitality	Values	Modern (cooperative)	For Students	Traditional (historically)
For Sisters	With students	With pastors	With faculty and others	Spirituality
As a community member	Of a Catholic education	Obedience	Community	Advancing the mission
Leadership qualities		Community influence	Gift	Tied to identity as — community member

Love	Faith Filled	Magnanimity	Mentor	Mission
Relationships		Discernment	Of Sister as an agent of community	Of community
For all people		Justice	Preparation for leadership	Of the gifts of the community
		Prayer		Of a school
				Charism
				Mission

The reorganized, reassembled data, once coded axially, revealed five themes that would serve to answer the second research question. *Love* stood alone, singularly powerful, just as it had in answering the first question. *Faith-filled, mentor* and *mission* emerged independently, without any consolidation, and with evidence-based clarity from the data. The fifth, *magnanimity*, was synthesized by looking at commonalities between the reassembled data that remained behind after the other codes were allocated and organized and by using Caruso (2012) as the constant comparison text. Magnanimity is an overarching principle which encapsulates this case community's overall philosophy spurred on by its charism, which emphasizes, among other things, generosity, forgiveness, humility and hospitality. The themes which answer the second question are rich, broad and textured. These formed the basis of the answer to the second research question. In all, five themes emerged first in the data: l*ove, discernment, identity,*

community influence and values. Then, five higher-order, synthesized themes which

emerged were *love, faith filled, mentor, mission and magnanimity*. These connect

dimensionally and reciprocally to form a model of successful religious-to-lay leadership

transition for Catholic schools, which the researcher calls the Quantum Quintet. This

model extends and expands Schuster's (2012) quantum approach to leadership, where

women religious organize themselves dynamically and reflexively rather than only

linearly. This model also response to the work of Schuttloffel, who sought in her work

answers to similar questions about who would lead sponsored Catholic schools in the

absence of religious. Each element that emerged from the data and which can be

employed in the resulting model will be fully explored here. The researcher begins with

the one that is common to both levels, the one that is the most powerful and the one that

forms the basis of all good things in an urban Catholic school: love.

Love. "And over all these virtues put on *love, which binds them all together in*

perfect unity" (Colossians 3:14). Out of 131 references to love in the data, each of the 6

participants referenced it with a mean of 20, with Sr. Mary Jane the most (27), Sr. Beth

the least (12). Sisters in this study expressed love in a variety of ways: for God, for their

Sisters in community, for their vocation as teachers, for their students, for their work in

various school settings in the city. Their manner of describing love explores, for

example, Sister Mary Jane's commitment to her community.

> You are throwing your lot in with these women, good bad and ugly. Some
>
> are my grandmother's age, and some are…well, fewer are younger than
>
> my age, but these are the women I will stand with when I am walking.
>
> When I am on my journey, this is the group of women I will walk with. I

feel supported, I am loved, they have the same moral beliefs I do, the same

faith structure, we are going to be on this journey together and stronger

together.

 Other Sisters mentioned their desire to advocate for justice. Sister Therese noted, "These

women are committed to justice, and that's at the core of who I am." Others, especially

Sister Beth, emphasized service, experiencing joy and fun in their work: "I always taught

with wonderful women. But I enjoyed the boys and girls. They really made life worth

living. It was fun." Sister Erin Brown spoke powerfully about growing relationships

over time, having meaningful conversations with God and her ever-deepening "love

affair" with Jesus. She recalled, "And for me, I said, it is all about a relationship. But it's

a relationship with God that is a love affair that probably started before I knew it." Love

is the center of the Sisters' mission; as Sister Therese noted, "At the heart of Catholic

education is the Gospel. That is what our foundation is." Matthew 22: 37-29 is a

frequently used Gospel referent for the Catholic expression of love in its purest form—

> Jesus replied: 'Love the Lord your God with all your heart and with all
>
> your soul and with all your mind.' This is the first and greatest
>
> commandment. And the second is like it: 'Love your neighbor as
>
> yourself.

However, another New Testament passage, Ephesians 4:2, exemplifies an ideal to

which many of the Sisters themselves both aspire and embody: "Be completely humble

and gentle; be patient, bearing with one another in love." Sister Angela exemplified this

idea when she noted,

If you come to me, the way I listen and talk to you, the fact that you can come to talk to me and I can help you through it and be supportive and see how Christ was working through that situation, that is how you bring and support a teacher's faith. I think it's also... and... owning the difficulties, they are having in their faith.

The Sisters in this study did not, in response to the first research question, prepare themselves for leadership; they were grown into leadership by older, more experienced members of their community. Their mentor Sisters loved these participants enough to encourage them to grow into the person they were meant to be. Sister Mary Jane, mentored by a Sister from another community in Diocesan administration, felt that her opportunity to work with that leader changed her forever: "It was Sister [name], and she was a huge a mentor to me. I loved her, we got along wonderfully and she was... it was a graced moment." Love is the basis of knowledge transfer as Sisters raised lay leaders; women religious in this study shared their leadership vision, their administrative talents, their vocational passion and their spiritual charism with lay men and women through the years in numerous contexts. The chaste love of a Sister for her lay peers in professional life could be demonstrated by listening to them actively, being present for them, doing for them, meeting them where they were and doing it all with a free and forgiving heart (Martins, 2010). As Sister Therese reflected, "We will stay committed to the cause and to this way of life. At this point in our world, women religious are one of the greatest gifts we can offer the Church and the world."

78

From a more modern leadership perspective, once in the principal's role Sisters in this study recognized the power in what Eddy, Mitchell and Amey (2016) called "leading from the middle"; they loved their faculty members and encouraged potential leadership to emerge from their ranks. These Sisters had taught alongside or directly hired their teachers; they considered context when choosing leaders for schools when they were leaving. This included looking for the best person for that particular job, not settling for the "known conception" of a leader, which could disadvantage women and people of color. Furthermore, they emphasized ethical, discerned and purposeful decision-making, which they modeled and conveyed through knowledge transfer. Love and support for teachers as people and education as a calling was always present for these women; Sister Joan remarked, "I think it happened in other teaching communities. I mean I was lucky. I always wanted to teach. My older sister was a teacher and I loved teaching," a sentiment echoed by Sisters Angela when she said, "I was really drawn to the [congregation] because I loved children so much, and they were a teaching community" and Erin Brown when she remembered, "I just loved being there. I did well in school. I liked to study and read all kinds of things like that." Additionally, Sisters in this study understood how to anticipate and address crisis through building relationships with gifted others, surrendering their own organizational egos to show support of the whole rather than promotion of the self, and were open to innovation in problem solving (Eddy, Mitchell, & Amey, 2016). As these Sisters were themselves mentored, they sought to mentor others. Sister Therese takes this to heart in her school currently as she leads her faculty: "My coworkers are happy and engaged and excited about some of the stuff we do together. I tell them every day; **this is about what we do together**" [emphasis added].

These themes—seeking to do for others rather than having things done for oneself—recalls the prayer of St. Francis of Assisi:

> O divine Master, grant that I may not so much seek/to be consoled as to
>
> console
>
> to be understood as to understand
>
> to be loved as to love/For it is in giving that we receive/
>
> it is in pardoning that we are pardoned
>
> and it is in dying that we are born to eternal life/Amen.

As these Sisters were shown magnanimity by their own leaders—that freely offered generosity of spirit—they were magnanimous to those potential leaders they themselves identified. Since these participants grew into their administrative roles by focusing on the mission of their community within their school, they were able, in turn, to exemplify that mission for faculty (religious and lay), parents and students. If love, then, is not the centerpiece of the entire process of shifting school leadership from religious to secular leadership, which includes what Sister Beth called "friend-raising" and honoring the value of every stakeholder (student, teacher, parent, administrator, congregation) in a sponsored school, the entire model collapses. The Quantum Quintet will cease to be. Echoing so much of the Gospel's message, no part of this leadership style has potential if love is not the single stabilizing force for all the others.

Community influence. Community influence can best be described as a continuum and it is the first pillar on the base of love in the Quantum Quintet. Older Sisters first recalled a traditional-directive model, where the linear, top-down congregational board, comprised of a General Superior and four Councillors, made every

80

decision for every member of the community (work, residence, professional development.). The community in this study is a member of the Leadership Conference of Women Religious (LCWR), an association of 80% of communities of women religious in the United States. The mission of the LCWR is to assist its 1350 member organizations "collaboratively carry out their service of leadership to further the mission of the Gospel in today's world." There is a second, smaller association for communities, the Council of Major Superiors of Women Religious (CMSWR), which represents communities which are, from a layperson's view, more "conservative" in nature. The members of the CMSWR engage in common prayer, community-based apostolates, wear the habit ("common and simple garb") and live exclusively in community. For the case community under study, the traditional-directive model was not questioned, since every congregation employed it. It functioned to keep communities vital to the Church, flush with obedient, energetic recruits, and active in a variety of schools, hospitals and parishes. Sister Angela observed, when asked about whether she ever made friends with postulants in other communities at college,

> They tried to control access. It was a much more controlling situation.
>
> We did talk to Sisters in other communities. But we were busy. We were
>
> in class a lot, we were bussed there in the morning and at night. We'd go
>
> the library just to get out. We were confined in those years of formation.

It was certainly possible that a young woman at that time could be attracted to the lifestyle or image of a particular community and not fully appreciate to extent to which she would have to participate in its ministry. Sisters Beth and Mary Jane didn't fully realize, at 18 and 19 years old, that they would have to be teachers when they were

applying to the community. Sister Mary Jane remembered, despite having a close friendship with one professed Sister who prepared her for entering the community, that "If she [Sister —] told me I'd have to teach, it didn't resonate with me!" Sister Joan, whoever only wanted to be a teacher, was very aware of what her community would ask of her professionally when she entered. However, she also recalled that some of her colleagues weren't so informed.

> But, there are Sisters who went into community because they wanted to be a nun, but they didn't have a passion for teaching. So they had to teach. Can you imagine getting up every single morning and getting out there and not loving it? Luckily, as time went on, they were given the opportunity to do other things. But if you ever had an experience in your Catholic education of having a Sister who didn't fit the bill, probably she was a round peg put in a square hole. She just didn't fit. I think you really have to like kids.

Both Sisters Angela and Erin Brown recalled, somewhat wistfully, the ritual of receiving "Obediences," which listed in writing every working Sister's next assignment. Obediences were given out by the Superior and were a cause of some anxiety for young nuns.

> We had Obedience Day. You got a letter… you gathered as a community and opened your letter together and it told you where you were going to teach. (Sister Angela)

> We used to get these papers, they were called Obediences. And we would all go into chapel, pray a little bit, for God's help with this

assignment and then open our Obediences. In my day, they weren't

usually total surprises. (Sister Erin Brown)

The formal process of receiving (and accepting) Obediences slowly gave way as changes

in communities responded to changes in Church organizational behavior. In the late

1960s, as Vatican II's modernizing reforms began to take hold, the Catholic Church

experienced a structural change unlike any in its history, putting the people first and the

hierarchy second. The social and cultural cracks that started as small fissures between

leaders and members, Rome and America, and the linear patriarchy of the Church versus

the cyclical femininity of communities of women religious broke open with seismic

volatility.   It changed the way Catholics interacted with their own church, with each

other, and with God. Post-Vatican II, as a way to serve the people where they were,

many congregations of women religious loosened their restrictions on job selection, the

requirement to wear the habit (either full or modified), where and with whom Sisters

would reside (inter-community homes, while not the norm, are not unheard of where

multiple communities serve a parish or school), and whether Sisters had to keep their

religious names or could use their baptismal names. What did not change for women

religious was the support they felt from their communities; Fischer and Murphy (2012)

found that the unconditional support found in congregational life helped Sisters feel "very

free" and, as one Sister put it, "the opportunity by choice to be a reflective person and

have the time to be a reflective person . . . so there's a focus. It's not just the identity"

(p.6). This attitude revealed itself in the data here as well when Sisters discussed the

transition from a very directive to a more contemporary organizational approach.

Sisters who had entered community life in the 1960s did not create career goals for themselves in the way contemporary women do. They were told where to teach, what grade, and for how long. If they found themselves in leadership, they likely hadn't sought it out. When the older Sisters in this study were asked about when they decided it was time to go into school leadership, the responses were consistent: they didn't.

I never did. The community suggested that I do it. (Sister Joan)

You didn't make your own choices. Why would I think about my career? I didn't think about my own career because it was mapped out by our Superiors. (Sister Beth)

Yes. I said, I don't want to be the principal. She said, I want you to go to St. [East Side parish] and be the principal. I said, ok. Because that's what you did! (Sister Mary Jane)

These women religious, who represent some of the most highly educated professional women in their age cohort and who would have had total professional decision making autonomy outside their community, were still bound to the expectations of their leadership in terms of ministerial mandate. Younger Sisters, however, saw the boundaries of that rigid framework being pushed further in order for women religious to meet their full potential as change agents not only in schools, but in other local ministries and, indeed, in their world community. Sister Therese was emphatic that she retained the freedom to decline a ministerial change when she was asked to leave a year-long post she enjoyed and for which she had professional education and training. However, she, like her Sisters before her, deferred to her congregation's wishes.

Then the community asked me to consider going to [school] to teach

[subjects] just to take my world experience [in a social-justice grounded

ministry] into the classroom. I laughed, they didn't. They were very

serious! I was like, are you kidding me? It was probably one of the best

moves I ever made. I could have said no. The community would have

supported my decision. I could have continued doing what I was doing.

But I believe in commitment to my congregation and the movement of the

Spirit within the community.

Sister Therese's primary ministry was more focused on direct social service counseling

and spirituality development. However, when she was asked to move into education, she

was able to meaningfully discern her decision without being pressured or summarily

beholden to an "Obedience."   Similarly, when her community asked her to consider

taking a principal's position, Sister Therese was given the flexibility and time to again

discern whether or not to accept their request. She knew that the community wanted her

to move into the role, but they also respected her need to discern for herself whether it

was a good time to change, or if she felt ready to make the change at all. Her questions

were reflective. "How can I be faithful to the community in moments of decision?"

Therese's experience is representative of how the traditional-directive paradigm in this

community had given way to the modern-cooperative standard.

Sisters now regularly engage in conversation with community leadership to

choose their jobs, even if those positions aren't in line with the community's historical

profession. Community influence has evolved considerably in the 50+ years since many

of the participants in this study took their First Vows. However, its change over time

does not diminish its importance in knowledge transfer. Community influence is the backdrop by which lay principal professionals learn, internalize and exemplify a community's charismatic elements in sponsored schools.

Discernment. The Sisters in this study took their discernment processes very seriously and its importance carries such weight that it forms the second pillar on the base of love. Discernment is described as "a decision-making process that honors the place of God's will . . . it is an interior search that seeks to align our own will with the will of God in order to learn what God is calling us to" (Paprocki, 2016). The participants discerned not only their initial calling to the community but to their professional development as they aged, became more experienced as teachers and administrators, and found themselves called to work other than teaching. Sometimes, their learning how to practice discernment began, as in Sister Angela's case, in childhood; "I knew in second grade that I wanted to be a nun." Her discernment rested in prayer and in the acceptance that her fate was not in her own hands; "God works in strange ways." For others, the discernment process started after some sort of epiphany that religious life could be in the offing, and could be a good fit. Sister Erin Brown recalled, after a beloved teacher remarked that she could be both a good teacher and a good nun:

> I think she was watching our groups and I always liked to be the, my
> mother called me the boss. Of course I thought of it as helping to lead
> because usually no one else wanted to…be the leader. Usually if we had
> reports, you know how somebody has to give them, I would always do
> that, I didn't care. I wasn't shy and retiring at all.

Decision-making for these Sisters sometimes happened privately, sometimes in collaboration with Sisters in their own community or inter-community. It was always a time of prayer, which Paprocki (2016) describes as a conversation in which the seeker is "honest and tell[s] God what... desires and fears are in this situation... pay attention closely to the ways that God is speaking to you. What kinds of thoughts, feelings... and memories might God be stirring within you?" During her vocational discernment, Sister Therese worked with another community to ascertain her calling to the community she would eventually claim as her own.

> I did a service project with another community but that was more of an opportunity to discern privately. I didn't want pressure. I discerned with another congregation in the area who knew exactly what I was doing. I was very honest with them in doing service with them. I didn't live with them or anything, but I did prayer evenings with them, very low risk kind of things.

Sister Joan was the first participant to remark that it is important to show laity, through example, how to practice discernment through mentoring and, in effect, knowledge transfer.

> For lay faculty… we encourage all of our faculty to get on board with the mission of the school . . . The first thing I did [after becoming principal] was acknowledge I didn't have all the answer to all the questions. I formed an administrative team. We had as many laywomen as there were Sisters. The guidance counselor was lay, the dean of admissions was lay.

We had a nice mix and we met on a regular basis and everybody had a say

in what was going on.

Sister Joan felt that increasing lay participation through active involvement in leadership

teams was critical to stabilizing and sustaining the school culture for the students and

families of the future. The way to ensure that future leaders practiced true prayerful

decision-making was to bring them into the process early with careful guidance and

discern with them on smaller matters, so complex issues, such as capital campaigns or

curricular overhauls, would not faze them.

Discernment also played a role for Sisters when they felt it was time to change

ministries. Five of the six Sisters in this study have engaged in other ministries besides

education in the time since they have been in school leadership. Of these, all of them

carefully discerned when it was time to make the shift in their work. Sister Erin Brown's

story is typical; she felt the call, after she had left her role as principal, to go into pastoral

counseling. She starting discerning after observing several students struggle with

depression and spiritual void during the tumultuous 1970s. According to Sister Erin

Brown, theology departments in local high schools were in disarray after Vatican II

because teachers were unprepared for the dramatic social shift that accompanied the

"new" rules of the Church. She felt that she could do more to support students and their

families by interacting with them in a counseling role.

So, I felt like I needed to get into some kind of pastoral counseling

because I was doing all this retreat work with the girls and it was a rough

time in the country. One year we had like, six kids attempt suicide... I

think it was an experience in the whole nation not just at [school]. There

was a lot of unrest... Theology departments in a lot of schools were a

mess. Vatican II, had sort left us in the middle of the stream...

Sister Erin Brown was able to look at the context of her work and be open to the call to

lead her students and their families in a novel way. Teaching is a good, just choice;

pastoral work was as well. Her discernment, then, was to find where her talents and gifts

could be used to help others achieve peace in their lives.

Discernment is an essential element for laity to learn with women religious before

stepping into leadership in a sponsored school. In order to have fidelity to the mission of

the school, decisions must come from a place of personal spirituality mixed with

understanding the import of all relevant facts and acknowledging the many interests of

stakeholders. Discernment is, as Martins (2010) explained, a careful consideration

between justified options, which he describes as "good and appropriate." This type of

purposeful decision making is one that is far deeper and more reflective than most people

attempt. It is a critical marker of effective, values-driven lay leadership in a Catholic

educational environment.

Values. The Sisters in this study each emphasized different aspects of values

when asked about Catholic education in urban areas, but their common prioritization of

values as an essential element put it as the third pillar in the base of the model. Some

religious interpreted the question of the value of Catholic education as requiring a single

answer; Sister Angela emphasized, "It is faith-based education, even if you are not

Catholic." Since the ratio of Catholic children to non-Catholic children in urban Catholic

schools can vary widely (Sister Angela's school was 99% Catholic, Sister Therese's was

52-48 in Catholicity) the implementation of "faith-based" can look different depending

on the student population. For schools where most of the children come from Catholic families who are parish members, Sacramental preparation, for example, can be an important hallmark of the religious curriculum and a marker of a shared dogmatic value; for schools where students are not Catholic and part of a minority group, such as where Sister Mary Jane worked, cultural signifiers of the children blended with the Gospel message of love to create an entirely unique, intersected, values-based school culture.

> This was a totally African American school. We turned it into a school
>
> that recognized African American history, African American music, things
>
> that were... that many schools were not doing at the time. [The pastor] had
>
> a parish that was all African American. So he was really into that, as were
>
> we. We had kids doing dance, African dance, we had programs where the
>
> kids... for Catholic schools' week, was spirituals and hymns and had a
>
> whole program of that… visitors would come and say, "this school is
>
> *happening*." We were four young nuns and we really loved the culture
>
> and we tried to make it happen.

Sister Mary Jane provided then, as Sister Therese provides now, a culturally responsive school environment that values the diversity of the children in it while offering them the doctrinal and dogmatic stability of Catholicism. Sister Mary Jane explained, when remembering her experience as principal in a school on the Southeast side of Cleveland, "We stood in a Catholic school and didn't bend. Today... we are talking about Asians, Syrians, Albanians, so multicultural, Hispanic… for me, some kind of faith, morality, is the basis on which you build." Sister Therese added, when asked about the values her multicultural, multi-economic status school imparts today,

We provide consistency. We are a solid organization that brings families

together. We have faith-sharing, education . . . something good is

happening there… I think God willing we will continue to be a

community, a positive presence in the community in which we serve.

Some of the religious, such as Sister Beth, expressed the role of values in the larger

narrative of their students' urban education experience and considered carefully what the

students would carry with them into their adult lives. Sister Beth's school was also

diverse racially and denominationally, and she noted,

For us, you know, when you look at diversity, you also have to say, not

everybody is going to be Catholic, but we can provide a values education,

a moral compass for our girls, develop it before we go to college.

Sister Beth continued, as she considered further the role of values-based education for her

students, "We are a sign of hope. We are sign a promise... for their families it's, 'we

have to do this so she is successful.'" The values-based education provided in these

schools could change a young woman's life, especially if she was from a challenged

socioeconomic background, of color, or a combination of both. Sister Mary Jane

acknowledged, "They may not leave as Catholics but we give them a huge advantage of

that kind of belief and background. They can fall on that in hard times in their lives.

When times get rough and you can fall back on faith, otherwise you have nothing. Just

despair."

Ensuring that all students are valued for their own talents and gifts is essential,

whether or not the religious shared a particular student's viewpoint. Sister Joan, who

primarily taught high school mathematics and was always encouraging her students to

pursue professions in science, technology, engineering and math, fondly recalled one alumnae who told her, 25 years after her graduation, "'You saved my life when you told me I didn't need math to get to heaven.' (laughs) It was true then and it's true today!" Sister Erin Brown echoed the value of students' individuality when considering the importance of connection and support between young women. "It's because of who [our foundress] was. She says in one of her writings that she is creating friendships between these women . . . she definitely was about teaching women their worth and their ability to change the world."

Women religious in this study were clear that neither their desire nor their goal was to proselytize to students, especially in urban schools with children of many faiths (or no faith); rather, their intent was to present living models of love, generosity and justice. "Values-based education" was a common refrain in all the interviews, but the implementation of it varied. In community-sponsored schools, Sister-principals endeavored to create school cultures that embodied hospitality and respected diversity as well as providing high quality Catholic (whole-child, liberal arts) education. It is critical, then, as a facet of knowledge transfer that Sisters communicate their vision of urban Catholic values-based education to lay leadership in theory as well as practice.

Identity. Identity was a key concept each Sister addressed during this study and is the fourth and final pillar of the model which emanates from the base of love. Identity, like community influence, ran along a spectrum for the participants from low level or tangible (clothing, religious name) to high level and intangible (such as esoteric markers of the community's charism). For most congregations up until Vatican II, the ceremony during which Sisters would take their final vows (profession) also included a ritual for

Sisters to shed their worldly clothing and receive the garb particular to their community. This attire typically included a dress or tunic in a color specific to the history or mission of the community, some type of apron, pinafore or caplet, and a veil. A naming ritual, where a Sister receives her religious name, was also typically included in the profession (Rives, 2005). Communities in the Leadership Conference of Women Religious (LCWR) have largely dispensed with the clothing and naming portions of profession, although the more conservative communities in the Council of Major Superiors of Women Religious (CMSWR) continue them. Sister Angela, who entered community in the early 1960s, began at a young age to differentiate herself in relation to Sisters from different communities with whom she had relationships, and knew who she could mirror and who she could not base on one quality: her own ability to sing, a low level marker by adult standards but a critical aspect for a little girl aspiring to be a nun.

> I also, when I was seven years old, knew the Carmelite Sisters. Or, I
> didn't know the Carmelites per se but I had a camp counselor who became
> a Carmelite Sister. She invited me to her clothing and her profession... I
> knew I could not be a Carmelite Sister because when I went to her
> clothing and profession, I could not sing like they did (laughs). So I knew
> I couldn't be a Carmelite.

Sister Angela, like her contemporaries Sisters Joan and Erin Brown, entered the community at a time when Sisters were given religious names by the General Superior. Sister Erin Brown indicated that Superiors could draw from a number of sources to bestow a name on a Sister making final profession; she herself received the name of a beloved family member in her Superior's family. Sister Angela was named after a

deceased Sister who also loved children; Sister Joan received a Saint's name that she felt fit her personality.

> Yes. I was given a religious name, which I liked, but I also liked my
>
> baptismal name. I was given [name]. It's a nice nun's name. If you read
>
> books about nuns in the old days, a lot of them were Sister [name].

Except for Sister Therese, all the Sisters in this study had worn some type of habit, either full or modified. Sister Erin Brown, in particular, was not attached to the habit as a marker of her identity as a member of her congregation. She attributed this to having a deep understanding of her foundress's intentions in forming the community and a solid sense of the historical documents that Sisters could use as evidence in decision-making and advocacy, especially if the Church ever decided to restrict them to their original Rule as organized by their foundress. Sister Erin Brown divulged,

> She was such a non-typical woman saint. She traveled. She had sort of
>
> her own little alternative universe in the Church. She had women
>
> ministering in a time in Italy when women weren't even allowed to go out
>
> of the house alone. So that was another draw. So I had been studying
>
> her... We were founded as a secular institute. She never suggested we
>
> wear anything distinctive. She never brought us together. The group in
>
> Italy that lives the original Rule and works in the neighborhood, bakery,
>
> factory, school—they live in their own homes and she [the foundress]
>
> suggested that we be a leaven in society.

Sister Erin Brown's commentary was, superficially, about habit and housing. However, it is really about *charism,* or the idiosyncratic spirituality of the community, a gift from

the Holy Spirit. Martins (2010) tells a joke which illustrates the concept of charism, albeit in orders of Men Religious:

> A Franciscan, a Dominican, and a Jesuit were sitting in a room when the lights went out. The Franciscan said, "My brothers, let us take this opportunity to consider the debt we owe to our sister, the light." The Dominican said, "Yes, but let us also take this opportunity to contemplate the difference between light and dark." Meanwhile, the Jesuit went to the basement, found the fuse box, and reset the breaker.

Knowing how charism flows through a community, what it inspires the members to do, how it shapes their worldview, is momentous. For laity who want to move into administration in a sponsored school, having a solid foundation in the charism of the community who opened the doors is essential, and knowledge transfer is the means by which charism can be explored, understood and modeled for others.

Charism is far more essential to identity in congregational life than clothes or even ministry. It is the sublime, ethereal, non-corporeal glue of the community; if all records—books, Rules, photos, artifacts—of the community were lost, two Sisters standing together could recreate congregational life through their charismatic expression of recalling the vision of their founder and the markers of how they express adoration for God, their Sisters, and those they serve. As Sister Angela emphasized," I am [community] in everything I do." Sister Joan echoed her: "So I was very much a [community] in education." Sister Therese followed up with, "I joke that when a [community member] works in a school it becomes a [community] school, even if it's Diocesan."   Sister Beth remarked, as she pondered how students come to understand the

role of charism in their educational lives, "We educate women for life, leadership and service. So that tradition, has to be fostered and cultivated . . . they know what it [the community] stands for. It's goodness, it's someone who cares for them." Sister Erin Brown captured both the essence of her charism and drew the line in the sand about who offers her that gift—and it isn't Rome. "Well, my spirituality is based on [foundress]. And not on what the Church thinks I should be. So, that's good enough for me." Charism can be shared with laity through knowledge transfer. With careful cultivation by current Sisters, lay school leadership can promulgate it for students, families and the larger community when no Sisters are able to do so themselves.

Each Sister's understanding of the aesthetic qualities of her congregation built an ark of elements that set both it and the schools it founded apart as unique and identifiable. In knowledge transfer, these aspects would need to be not only understood, but supported, advanced and integrated by lay principals in order to have fidelity to the Order from whose vision the school originated. Precepts that are essential for this community in its schools—the markers that are operationalized in the day to day activities for students, faculty and administration—include charismatic elements as well as tangible artifacts that can be used to didactically, theologically and historically.

As indicated, the five themes explored here formed the base of the proposed model. Five more complex themes formed the second layer of the model and rest atop the pillars as a supported, overarching paradigm. These include mentor, mission, magnanimity, faith-filled (in relation to leadership) and, of course, love. Since love is common to both, only the remaining four will be analyzed here.

Mission. Mission was addressed, acknowledged and explored by every Sister

during interviews. It is a term of art and used deliberately in reference to the specific

mission of the case community as advanced through its institutions. Colloquially, the

participants sometimes used to describe the contexts in which they served. One

unexpected and rather fortuitous example of mission was brought up by two participants,

Sisters Angela and Erin Brown, in their separate (and weeks-apart) interviews. At one

time in their respective careers, they were asked to serve together in a parish school in

another state. They were asked to fill the role of principal (Angela) and coordinator of

religious education (Erin Brown) at a brand-new K-8 school which would serve, among

others, high-poverty and/or Hispanic populations. In their interviews, when each was

asked about how she valued the idea of her community's mission, this new school came

up as a representation of that concept. Sister Angela recalled that even though she hasn't

served there in nearly two decades, her work as a founding principal and a member of her

order lives on through the ongoing success of the school:

> In [state], *the mission lives on* [emphasis added]. I've been gone 19 years.
>
> But it's as important now. They did go through a weak period, but it's
>
> back now. The fact that they [the parish leadership and the current school
>
> administration] refer to us and know about us, not us individually but as
>
> [community members].

Sister Erin Brown echoed this sentiment in her interview. She recalled that she had

"burned out" a little at her parish assignment and was eager for a new challenge. In her

role as coordinator of religious education at the out-of-state parish and school, she had

the freedom to create multiage programming, kick off appendant clubs for students, and

develop religious curriculum with very little funding while relying on a volunteer base who were eager to follow her experienced lead. More importantly, Sister Erin Brown did it all in the way that only a member of her community could—with her particular charismatic spirituality guiding her.

> And then we started a school, really, in [state], and they asked me to go
> and do the parish work... well, I decided that I had been at [East Side
> parish] for seven years... so, I called our President at the time... I said, I
> really think it's time for me to change. She said, I was just thinking about
> you. Come and see me. So she said, since you want to leave, how about
> [state]? I thought, that sounds good... I started RCIA, I started Youth
> Group, I started PSR... they were sad to see me go.

Other participants in this study emphasized their desire to create ways to share their community's mission with others, including and especially in sponsored institutions. Sisters Joan and Beth both discussed in depth the importance of a cohesive "mission team" in any sponsored school, comprised of Sisters, faculty and students, who keep the mission of the school alive not as merely a letterhead motto or a marketing tool, but as a daily practice that helps shape school climate and culture. The idea of a mission integration team was not one which this community created out of whole cloth; as Sister Beth acknowledged, "We looked at another school that had one and patterned ours after that." In concert between community leadership and their school's administration, they reached a collective decision to promote consistent activity by the team with a focus on monthly school wide programming to keep faculty and students centered on the values that make the environment unique. Sister Joan, who originated the idea of a mission

integration team when she was first principal of her institution, still serves on it as a part-time faculty member.

> All of our sponsored institutions have a mission integration team at the
> school. So, it's their responsibility, I'll take [school] for example but I
> know it's happening at the other institutions. There are laywomen and, in
> fact, I'm the only Sister on the mission integration team. There are
> students and faculty and that's our job— to make sure the mission
> continues and that students and faculty are apprised of and practice the
> mission. So, and that principal at our school and the assistant are on that
> team. They are constantly reminded. We do activities all the time.

Sister Beth echoed her colleague and expanded on the purpose of mission integration in a sponsored school. She noted that currently and for the first time in the team's history a student serves on it, much to the delight of the administration and community:

> They continually reinforce that. It's not a one-time thing. It's active
> every year with the faculty and staff as well as with students. It's a thread
> that runs through the school... There is an acknowledgement of students
> and staff who have the facets of our founders. Fellow students nominate
> their other students for this. We also use the newsletter for this. The
> parents also have an orientation. We also   have a freshman induction
> and part of that is woven into the parent piece... right now there is a co-
> coordinator, and it's a student... isn't that interesting? ...the coordinator
> reached out and said and we need a student to do this. And this girl
> stepped up. Fascinating, isn't it!

In her interview, Sister Mary Jane mirrored her peers in stating that advancing mission must be a consistent, collaborative effort. Having support from her community and from the laypeople that assist her in her work is essential, because she recognized early in her career that the mission is never about one person.

> I think mission first, but I'm not doing it by myself. I have seven people here. I can rely on the Sisters. I can ask the Sisters help me with anything... it's stewarding them... who we are, what we do... it means the world to them.

It was Sister Therese, however, who gave the most poignant response in considering whether a layperson could ever protect and advance the mission of a community institution with the same fidelity as a Sister. Given her relative youth (33) in comparison to her peers, she has a sobered, realistic assessment of her place in her community. "As the youngest member, my chances to serve in congregational-sponsored ministries is probably less as we move into the future," she observed, although she would certainly take any opportunity to do so if the community asked it of her. Sister Therese will rely on educated, compassionate, committed laypeople as she presses on as perhaps one of the last living transmitters of her community's charism.

> The mission will move forward, the legacy of [the community's] education will move into the future, that the Spirit of [the community] will always be a part of it. It will move on in new and different ways beyond us. The community is very good at acknowledging that *the hallmark of good leadership is that the legacy can continue when we are no longer here* [emphasis added]. We have tried very hard to plan for that.

Mentor. The second code which emerged after the axial re-imagining was "mentor." Every Sister in the study indicated that her growth as an administrator was nurtured by more experienced Sisters. Every Sister also revealed that she chose deliberately to pass on her knowledge to other Sisters to help them learn to live, teach and make decisions with intentionality. More importantly, for the purposes of this study, each Sister also actively chose to mentor laypeople with which she lovingly shared her school, her community and her spirituality. Mentoring, then, is a reciprocal, love-based relationship based activity that is critical in growing future leaders. Many of the Sisters noted that the laypeople that were most successful in coming into administration in sponsored institutions either came from faculty and/or were alums of the school. Sister Erin Brown, who hired the teacher who eventually took over for her when she left her East Side parish school, related that at the time she decided to move on from her role as principal, her intended successor didn't have a Master's. Rather than allow him to be passed over for what she considered a minor obstacle, she stayed on an extra year to give him time to start his graduate work and be prepared for the principal's office when she left.

> I always like to leave someone in charge when I'm leaving. So, I sat on
> that for a while. Then I told the pastor that this [teacher] wanted the job.
> So he [the pastor] said well, let me think about that... he just has a teaching
> certificate. I said, [a local college] has a graduate program, he could start
> classes there now…so that's what we did. I always had an aide in
> building, who was either specific like a kindergarten aide, building aide,
> computer teacher, something like that. So he was one of those people and

I had hired him after he spent a year with me. And he was a great teacher,

so I thought, he can do this [be the principal].

Sister Mary Jane also understood the need for principals to be mentored by those who

had filled the role previously and who had a deep background of spirituality to

complement their academic and methodological acumen. In her role as a higher-level

administrator for the Diocese, she spent a significant portion of her time coaching

principals in urban Catholic schools not only about education policy and procedure, but

about servant-leadership, planning student-centered program, and creating and advancing

school culture that valued learning and students. Her eye for detail, organization,

charismatic knowledge and proactive planning helped ensure that her first-year lay

principals were able to support their faculty and families.

I met with every new principal, let's say I had 40-some schools, maybe 10

new principals, I'd meet with them every month. And I'd say, Ok. This is

what you need to get ready for next month. Next month is November,

how about a Thanksgiving prayer service, these are the kinds of thing I'd

like you to consider, this would be a good time to talk about this, do this

with faculty, how about this. I did this every month for every month.

They were eternally grateful. I was putting them ahead so… testing is in

March. In January, you have your person who does the test books, how

many do you need, do you have enough, what should you order, did the

order already come in. There were people who said, every single month, I

did what you said.

In the exploration of this theme, it was again Sister Therese who, in her relative youth, offered in interview a powerful glimpse of what it means to be a multi-dimensional leader of lay faculty in an urban Catholic school in 2016.

> Yes, I have a gift to see the big picture, motivate and get people going. Part of my leadership style is to stand with a person to show you are with them. Show them how, don't do it for them, but show. Then back off as life unfolds, but all-in mentality as a "with them." You will help the dream become reality, which makes a big difference.

Magnanimity. The third code that emerged after axial coding, and the only one that needed to be synthesized rather than emerging fully formed, was magnanimity. Magnanimity includes love but also moves beyond it; it is a more complex, richly textured, selfless quality. It embodies deeply personal generosity, forgiveness, and a simultaneous acknowledgement of a power differential and not taking advantage of it. Derived from the Latin roots for *magnus* (great) and *animus* (soul), this code, which revealed itself from this study's data as it was compared to and analyzed against the Caruso (2012) data, also encompasses the idea of humility and hospitality. These are hallmarks of the case congregation's sponsored institutions, and, indeed, all their ministerial undertakings. It becomes an essential facet of school culture in these contexts. Magnanimity also implies sharing, and in this case, sharing gifts; Sister-principals shared their prophetic mantle with laypersons through promoting their organizational vision, spiritual gifts, and zeal for service. Sister Angela perhaps gave the strongest endorsement of this in her prediction about how school success could be ensured once the environments were being led by lay principals:

I hope we are leaving laypeople who can carry on quality Catholic

education. I hope we are leaving people who we know who maybe aren't

in Catholic education but who support it. They will see the value and do

what they can to support it. That we always recognize the need for good

quality Catholic education for all. I think that's what we strive for and I

just hope it continues. People know that education is valuable, and in

other areas too, but it's bigger than us. *We educate in many other ways*

than just in school. We educate in   groups, by what we stand for. It

permeates [emphasis added]. I don't claim to have answers but we do

what we do with good intentions. I hope we can impact the lives of others

so they can impact the lives of others. It must be carried on.

To help with the synthesis of this third code, the constant comparative method (Boije,

2013; Glaser, 1965) was useful to align the current data with Caruso's (2012) qualitative

research data on the Sisters of St. Louis (SSL's), the Sisters of Charity of Leavenworth

(SCL's), the Apostles of the Sacred Heart of Jesus (ASCJs), and the Sisters of St. Joseph

(CSJ) located in Orange, California. A Jesuit, Caruso was interested in telling the story

of Sisters' vocation and their leadership in Catholic schools. Like the Sisters in the

present study, Caruso's nuns filled the schools during the height of the child-flush 1950s

and 1960s, when the number of American vocations soared to unparalleled heights of the

20th, and indeed any century since the arrival of women religious in the New World.

Starting in 1949, the Sisters of St. Louis, for example, served in nearly 100 schools in the

Dioceses of Los Angeles, Orange, San Francisco, and San Diego, plus assorted smaller

ministries in Washington DC, Indiana and North Carolina. The community

capitalized on flourishing parish life and a powerful Catholic school identity to accompany it. The enormous Catholic school system across the United States that resulted from the post-World War II baby boom was, in hindsight, likely not sustainable, but in the moment it seemed as though the Sisters would always be present in schools in large dioceses in every state. By 2007, however, the SSL's had withdrawn from 80% of the institutions they had been staffing for over 50 years.

Caruso (2012), in his findings, attributed to the dramatic downturn of teaching Sisters to an inevitable shift in how they were able to meet their needs in their professional growth and development. After Vatican II changed the way in which congregational administration could elect to place Sisters in employment—Caruso terms the modern model "open placement," where Sisters find their own positions rather than being assigned to them by leadership—Sisters may have reported more professional satisfaction with their work, but an unintended consequence was that the number of religious from the same community staffing the same schools continuously diminished precipitously. In the present study, as in Caruso's (2012) study, all the Sisters indicated that once their leadership allowed the open placement model, their community's consistent presence in local schools they had traditionally staffed, as well as in their own sponsored institutions, declined.   Women religious expanded their ministries to include, among other things, nonprofit work, retreat programming, development and fundraising, and social activism. Their choices were not made because of dissatisfaction with being educators necessarily, but because they felt that, in the time since they entered, they were more prepared to taking on daunting challenges on behalf of their community's mission. In the spaces they left behind at schools, Sisters were generally replaced by lay faculty

and, eventually, as need warranted, lay administration. That transition intensified the need for effective knowledge transfer between Sisters and their replacement lay faculty.

A second strong connection between the two studies is that Caruso's (2012) data, like the data here, emphasized that relationships are the means by which all endeavors of the respective missions succeed. As Sister Mary Jane noted, "It's ALL about relationships." Sisters who built active, supportive relationships with their stakeholders had easier and more successful transitions in leadership, especially if the stakeholder in question was a pastor. They also made discerned choices about who their replacement could or should be, and could field recommendations to search committees and boards of trustees. The third and final way in which the two communities share perspective on transitioning to lay leadership is the reciprocity of the quality of magnanimity between both mission and mentor; these three factors, like a trinity of interwoven giftedness, create a united, perfectly closed system in which faith-filled lay leadership can share dimensionally, by and through love, in leadership of sponsored institutions. Using the constant comparative method to align this study with Caruso allows the code of magnanimity to emerge.   It clicked into place, along with mission and mentor, as a critical aspect of effective leadership in transition.

Faith-filled. One important item that was part of the body of questions surrounding the move of a school from religious leadership to laity was the notion of "essentializing" the factor(s) that make a successful lay leader of an urban Catholic school. Each participant was asked to list, in her opinion and experience, the essential qualities of such a successful person. The researcher expected, as one might, to have

106

credentials such as "master teacher," "experienced principal," "X years of experience" in

the list. The researcher was wrong. Sister Mary Jane responded:

> *They need to be a faith filled person* [emphasis added]. A faith dimension
>
> to it. Because there is a whole sense of spirituality to offer the student,
>
> right and wrong for the children, morality, virtues, integrity, honesty,
>
> stories you can relate to both from the Bible and from model lives of
>
> adults… not just religion and then everything else. It permeates
>
> everything we do. If this person isn't that way, doesn't have a faith-based
>
> and I mean a real strong faith, then I would say that person is… that would
>
> be hard. You would be losing a huge dimension of what permeates a
>
> school, every teacher, every classroom. *It comes from the principal*
>
> [emphasis added].

Sister Angela echoed, "You know, even in community—its collaborative and it's a

process. In a Catholic school, that's my whole life, that spiritual dimension. You better

have somebody totally committed the Catholic vision of education." Sister Joan followed

with, "I think that the mission is very much based on Gospel values and so… in a

leadership position, as you said earlier, *I think the principal's role is THE most important*

role in the school [emphasis added]. To be firmly committed to the Gospel values and to

have that lens all the time is very important." Sister Beth remarked, "They should have

an understanding of Catholicity and of the mission of the school. That would include the

charism of the community." Sister Erin Brown explained, "Well, I think that a deep

spirituality. And it doesn't matter what kind or whose . . .And following from that, the

issue of justice. But I think anyone with a deep spirituality can't get away from justice."

Finally, Sister Therese noted, "I would like to think the spiritual elements, the things we put in place, are still there and are active." Whereas, then, a search for secular school principal may emphasize a candidate's academic credentials, his/her programmatic or assessment outcomes or enrollment increases (or, at least, being attrition neutral), for these women religious a candidate's spirituality, "faith filled"-ness is the key factor being a successful lay principal. Not one participant mentioned having a Master's in Administration, a portfolio of highly ranked school report cards, or other traditionally desirable metrics. These never came up during any interview. When asked why, Sister Therese explained, "We seek to live counter-culturally." What the world demands is not necessarily what these women religious demand, value, or desire, and the same goes for what they want in a lay principal of one of their schools. They do not want a numbers-concerned, authoritative, impersonal manager, Sister Beth observed; they want a reflective, contemplative, relationship-driven leader.

Summary: Addressing the Research Questions of the Study

The rich, thickly detailed, deeply personal, highly illuminating data derived from the six participants in the case community provided the following answers to the central questions in this study. The data could have only been gleaned in interview; the social relationship which is essential to the interview process is the embodiment of constructivism in this constructivist study (Mishler, 1986). Since the researcher came to the participants as a knowledgeable partner—educated in Catholic schools, familiar with issues related to school culture and leadership—there was already a comfortable rapport in place that only grew in intimacy as the interview progressed. The generosity of the

participants in examining their lives to cultivate answers to the interview questions—

which, as a courtesy, they were provided ahead of time—cannot be overstated.

1. How did the Sister-educators from one community in Northeast Ohio who were

   called to the principal's role prepare themselves for leadership?

They immersed themselves in the identity elements of their community, both tangible and

intangible, and discerned their call to leadership by attending to the values inherent in

their community's spiritual charism, the most powerful of which was love. They were

nurtured and grown.

2. When it became clear that the future of their urban school depended on

   transitioning to lay leadership, how did Sister-principals prepare their religious

   communities and their school communities for that change?

They discerned, through and by love for their community's influential charismatic

identity, to find faith-filled, values-based lay leaders to take their place, and they

mentored them with magnanimity to advance the school's mission.

CHAPTER V

DISCUSSION

Do something. Get moving. Be confident. Risk new things. Stick with it. Get on your

knees. Then be ready for big surprises. —St. Angela Merici

Introduction

This chapter will compare the qualitative data collected in this study to the pre-existing literature review on the subject.   The leadership model, the Quantum Quintet, which emerged from this data will be presented, explained, and explored. The data from this study will be viewed through the lens of knowledge transfer, the theoretical framework for this study, as well as constructivism, the interpretive framework for the study. The researcher makes policy recommendations for using the proposed leadership model in other contexts; it is not only for use by religious who will leave their urban Catholic schools to laity and lay professionals who aspire to leadership in urban Catholic schools. This chapter concludes with recommendations for future research on this topic within educational history, leadership studies or religious education.

Current Study vs. Literature Review: Agreement in the Data

The women religious in this study are doers. They are movers—of boundaries, of limitations. They are also receivers of spiritual calls, of inspiration. Confident in their

110

abilities, they willingly take on risks for their community and their schools prayerfully and intentionally—and each of them has been consistently surprised by the opportunities and subsequent successes that followed them throughout their professional careers as educators, and then, administrators. More relevant to the central questions of this research, each of them has committed to communicating her order's charism and mission purposefully to the lay professionals who will come after her, work alongside her, and eventually assume total leadership of her community's sponsored schools. Notwithstanding (and certainly in spite of) the leadership transition challenges explored by Caruso (2012), the Quantum Quintet, a model which extends Schuster's (2012) quantum leadership approach, dimensionally reflects the values of the community that permeate into and simultaneously support the principal's role as mentor, missionary and magnanimous leader. Charismatic spirituality is certainly an aspect of "principalship" in faith-filled, laity-led Catholic schools. The elements identified are essential to mission fidelity and advancement (Buchanan, 2013; Crotty, 2005). The model emphasizes the reciprocity between its foundational element—love—and an administrator's ability to build and sustain meaningful relationships with all stakeholders: students, families, faculty and the community in which a school is situated.

Generally, the participants in this support agreed with and in many cases authentically extended the most recent literature on Catholic school leadership, school culture and the evolving identity of apostolates. Two "truisms" about religious community life and their sponsored schools in Cleveland emerged over the 12 plus hours of interviews with the participants. First, it appears as though Schneiders' (2011) prediction that Sisters would "articulate a new model of ministry" is coming to fruition.

Sisters who came up through an organizational structure of isolated, silo-lived experiences in one apostolate only with women in their own community are now sharing ministries in wholly re-visioned ways that are still grounded first in faith. Second, Fischer and Bartholomew (2010), who recognized the important role Sisters play in serving those affected by urban poverty in Cleveland, recommended from the findings of their study that "the role of faith in service deserves further attention" (p. 12); that prescription has been explored here both fortuitously and intuitively.

Andronovien's (2013) assertion that where women religious are accepted in service and local ministry they are often not tolerated as policymakers by the male bishopric is likely true for these participants. Certainly, all of them have been aware of the position of the (now previous) bishop towards lay teachers in Catholic schools in this diocese; under his purview, the diocesan hiring contract language called them "teacher-ministers" (whether they taught religion or not) and the morality clause section of the document proscribed quite common and legal behaviors, such as in-vitro fertilization to achieve a pregnancy or living with a partner without being married in the Church. Several of the participants took issue with the contract language as being cold and unforgiving from a spirituality standpoint and short-sighted from a professional one. One responded, when asked about the contract, "I just think, we are not here to judge. We are here to support. When something is wrong, I will say it. But I will not judge." Another was more direct in her position that the negative attitude towards women in leadership and power generally has been festering for some time: "I think Donald Trump was elected in part because of John Paul II... because of all the bishops he appointed in this country who preached to their priests almost to point of saying, if you vote for her, it's an

unforgivable sin. They were saying that in our Diocese. *That* is the unforgivable sin."

Perhaps as a testament, then, to Mongoven (2009), who noted that women religious were both adaptable and evolutionary in times of economic and organizational challenge, these two sentiments from experienced women religious show their evolved internal spirituality and outward worldview. They are not merely unthinking transmitters of policy conceived and fostered by men. Instead, they advance a mission which is grounded in their charismatic spirituality whether it matches the male hierarchal directive or not.

This study supported Walsh (2010), Abbot (2013), and Johnson, Wittberg, and Gautier (2014) in that the participants echoed and extended points each of the aforementioned researchers emphasized in their own work. Walsh, who also used historical case study, recommended "intentional transmission" of the founding charism in order to retain resilience in schools; this point was reiterated time and again by the participants here. While she didn't use the phrase or theory of "knowledge transfer," Walsh's evidence-based proposals for community schools had strikingly similar tenets and serves as a guide for this study's endorsements. Abbot advocated for a more modern model of participative governance, a suggestion this case community has clearly taken very seriously and one which has had positive impact on both the members and their schools. Lastly, Johnson et al. (2014) found that Sisters in their study frequently noted that their exposure to older, professed Sisters in educational contexts guided their vocational discernment. This was absolutely mirrored by all six of these participants here. Each of them was gently guided and encouraged in vocational discernment by Sisters with whom they had daily contact in the classroom, whether it be in primary

grades or high school. The value of modeling that Sisters offer to faculty, students and families merely by being present in a school cannot be overstated.

Schuttlofel's research (1999; 2001; 2003; 2008; 2009; 2012; 2013) drove much of the interview planning and considerations in this study. Her work set the stage for communities to consider their strategic plans for moving from a leadership choice within their congregation to cultivating leadership from the laity. One of the most striking connections between Schuttlofel's (2001) work and this study is when she quotes Mulligan (1998) in noting that ineffective Catholic leadership development is caused by "a trinity of poverty": Theological, educational and spiritual. Here, the data revealed that one way to combat this is to offer emerging leaders what this researcher calls "a trinity of abundance": mission, mentoring, and magnanimity. When placed alongside a faith-filled leader guided by love, the trinity of abundance diminishes Mulligan's, and by extension Schuttlofel's, concerns about poor leadership in Catholic schools. It offers a workable, pragmatic series of solutions to very real issues in leadership and it does so proactively and with regard for context. A second connection between Schuttlofel's (2013) work and the present study is how she addresses the anxiety of lay leaders who were raised in a far less dogmatic Church than their Professed predecessors. They may struggle with the responsibility of sharing the prophetic mantle when they themselves are in still in spiritual development, or even spiritual struggle. How outgoing Sisters (and Brothers, and Fathers) prepare and support the incoming laity in their inculcation into charism and Catholic identity is a fundamental aspect of successful transition leadership plan. Participants in this study have given great thought to this transition story and prepared subsequent lay leaders for the challenge.

One final and quite substantive agreement between the literature and the present study is in regard to Schuster's (2012) unique approach to describing modern community leadership—in her words, it is a "quantum" approach. Citing earlier work by Gaciu (2010), Schuster noted that "organizations are surprisingly complex structures that function as living, non-linear, dynamic systems!" (p. 23). Members of communities *are* the whole, according to Schuster, and they exist both separately and as connected entities. Intelligence, insight and experience are cultivated from individuals who contribute to both their own community and the larger community of women religious in order to reach democratic, relationship-based, creative solutions to collective problems. An important facet of quantum leadership for Schuster is that journeys for women religious are no longer proscribed; they are, rather, driven by a respect for the authenticity of the personhood of each Sister. The "intentionally directed energy" (p. 26) that women religious can have in growing future leaders can allow for expression and development not only within their congregations, but among their faculty and students in their sponsored schools. This is especially true when a quantum leadership approach is used in concert with knowledge transfer; they are complementary to one another in that for both, "big picture" thinking is important, reciprocal communication between members is essential, and sharing knowledge freely, not holding onto it under a "need to know" policy, is what moves an organization forward with love for the mission. It was in examining the qualitative data with Schuster's work in mind in this study that a dimensional, multi-faceted leadership model began to emerge.

Towards a More Developed Quantum Leadership Model: The Quantum Quintet

To extend Schuster's (2012) quantum approach theory in light of the way in which this study's data parsed out through both sets of frameworks (theoretical and interpretive), the researcher took the first quintessential element which emerged out of pattern coding for the first research question—love— to build foundation of a more developed quantum leadership model. Using colors associated with the liturgical calendar (Archdiocese of Boston, 2017) the researcher identified love's color, red, with gifts of the Holy Spirit, fervency, and fire. The four remaining codes which helped answer Question 1—identity, values, community influence and discernment—form pillars which rest on the base. Their color, white, represents light, purity and joy. The space within the pillars is an open tabernacle of sorts which contains the charismatic elements of a particular community. These are not visible, but rather conceptual and intangible. They come into being only by being put into action; they are gifts of the Holy Spirit which must be used for the benefit of others. Four of the five codes which emerged out of axial coding for the second research question—faith-filled leadership, mission, mentor, and magnanimity— devise the apogee, which, when viewed dimensionally from the top, form a "bullseye" paradigm of successful lay leadership transition. We can see that the center is love, the origin of all good things, and which acts as the fifth code in that level. Mentor, magnanimity and mission are represented by the color green, which signifies hope and the gift of life. White is used again, this time as the color of faith-filled leadership, here it serves as a reminder the mysteries of faith.
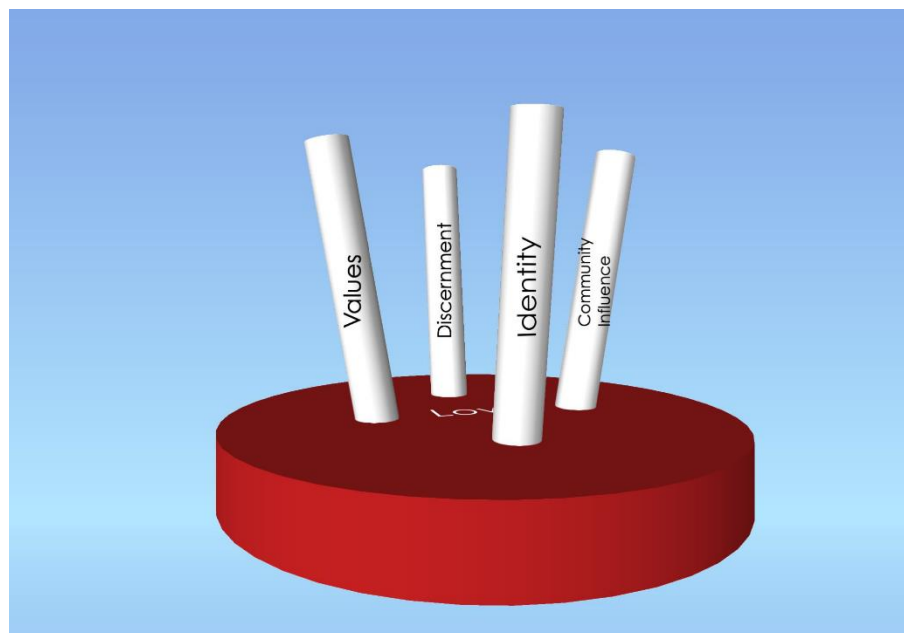
Figure 1, illustrates the foundation of the Quantum Quintet. Figure 2, illustrates the pillars that connect through and by love in the Quantum Quintet. Figure 3, This figure
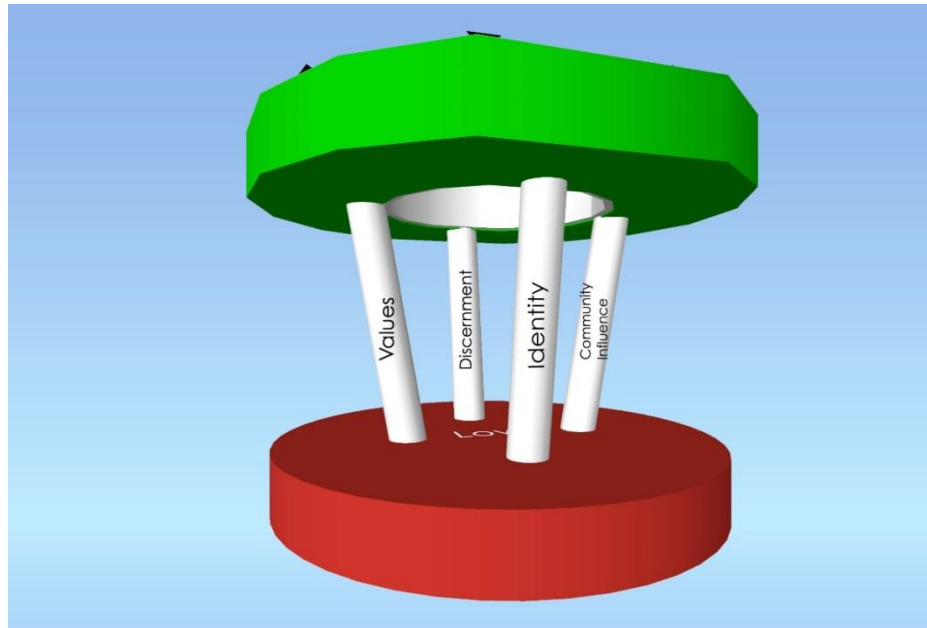
116

illustrates the pillar support in the Quantum Quintet. And Figure 4, illustrates the second-level, interconnected, reciprocal codes in the Quantum Quintet.
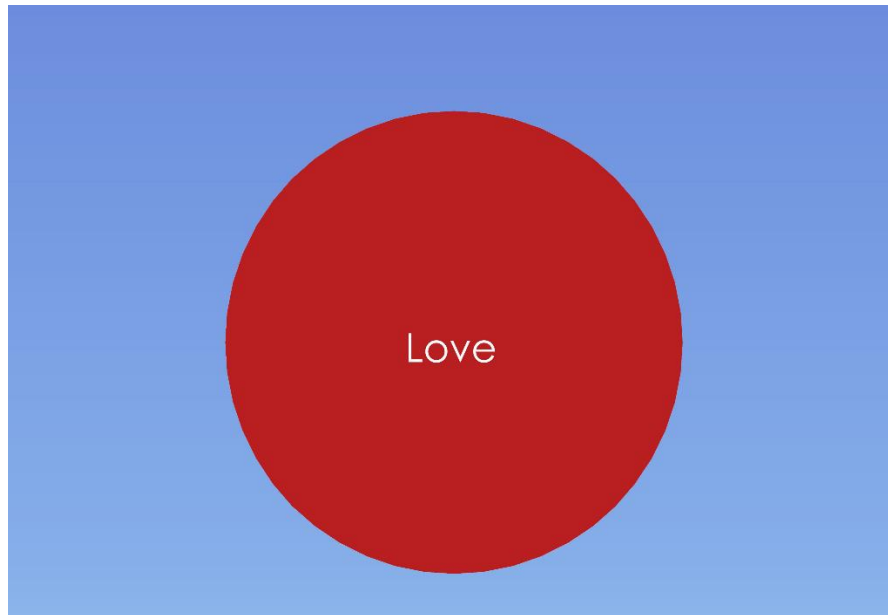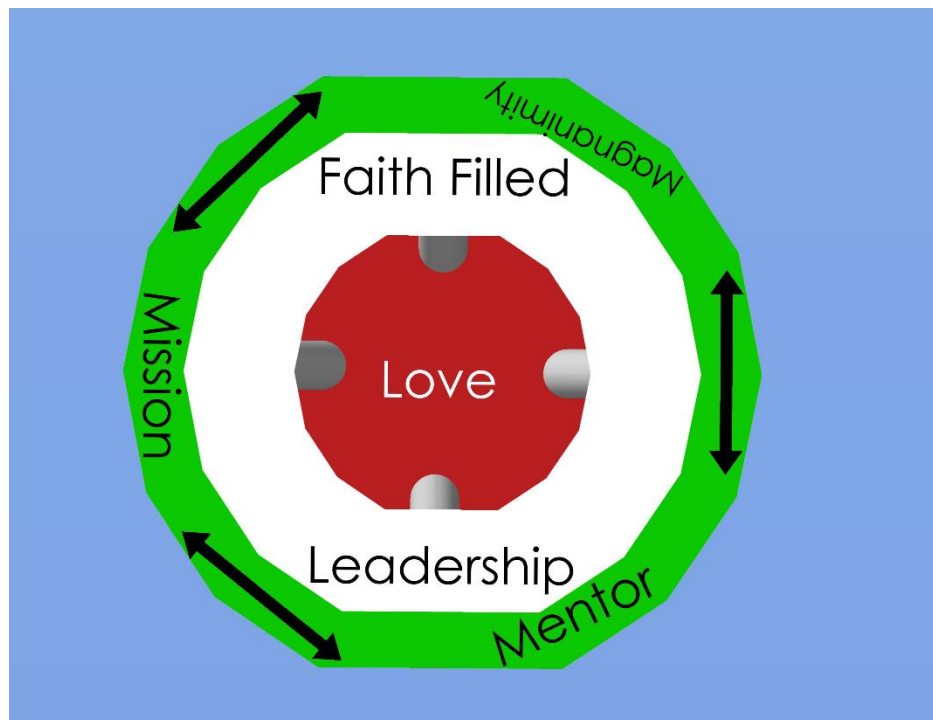

Figure 1. Love

Figure 2. Values, discernment, identity and community influence

Figure 3. Top-level of model

Figure 4. Mentor, magnanimity, mission, faith-filled leadership and love

Each element in the model is powerful, but will not by itself facilitate a successful leadership shift from a religious to a lay professional. However, this double layered five prong model, which the researcher calls the Quantum Quintet, (Qu5) organizes and interconnects the macro-codes as the core collaborative values which represent a successful leadership transition philosophy. Following Schuster's analysis, the model is dynamic, relationship-driven and grounded in growing knowledge about effective Catholic school leadership through sharing lovingly with others.

Current Study vs. Literature Review: Disagreement in the Data

As to be expected, there were some factors of disagreement between these participants from the case community and the extant literature. The Maddie & Rulla (1971) study in which women religious viewed themselves as disciplined, deferential, and selfless probably would not ring as true with the Sisters who contributed their stories, insights and experiences to the present study. Certainly, they are disciplined, but "deferential" is too akin to "obedient" and that kind of emotional, personality passivity is not present in this cohort. They are more like the women observed in the Curtain (1995) study: innovative, multifaceted, deeply textured. The older Sisters who remembered "obediences" did not necessarily do so fondly; it was more of a recalling of fact than a remembering with nostalgia.

The same discordance is perceived between this study and the small segment of literature on Catholic school leadership and the role of inclusivity in urban contexts. Kelly (1987, as cited in McClelland, 1996), Bishop of Salford, a city just to the west of Manchester, England, admonished his clergy to be leery of allowing open enrollment of non-Catholics in diocesan schools. Acknowledging that the funding that comes with a

119

student could secure the existence of a school in a challenged context, the Bishop felt that admitting non-Catholic students solely for tuition, and not to provide them with the fullness of Catholic catechism, was incompatible with the fundamental purpose of a Catholic school; "We are a community which takes seriously the accomplishment of salvation . . . we do not accept that we can include RE in any curriculum and be content that our duties are fulfilled" (p.10). McClelland (1996) reiterated this notion; a Catholic school is, in his words, "an authentic missionary apostolate." The participants in this study would take issue with this hard-line position—and indeed have done exactly the opposite in all the schools in which they have found themselves. All of them work(ed) in schools where non-Catholic students were admitted. These students were accepted on their academic merits and had loving, productive educational experiences as growing, developing persons-in-community regardless of whether or not a conversion to Catholicism was possible or even desirable. In Sister Therese's school, 48% of her students do not identify as Catholic and her school enrollment has grown by 21% in the last academic year. A significant part of her work is done on building for all her students, Catholic and non-Catholic alike, a school culture grounded in integrity and love.

> We are trying to build them up. It's a world where our youth are looked
> as annoying, not have the best image. They've earned it, but not always.
> In an age of social media…their self-value is indicated by how many likes
> and retweets and if they have the right filter on their Instagram….so trying
> to really build them up as leaders of this school and this is how we do it.
> It has made a big… I tell you, I spend all my time creating climate and
> culture.

Sister Therese feels very fulfilled in the work she is doing and is not in the business of "accomplishing salvation." She is in the business of providing high-quality, evidence-based education for any child who comes to her regardless of race, ethnicity, socioeconomic status or religion. She is doing the opposite of what Kelly directed of his priests, yet she feels she is the one meeting her Christian duty: "Because at the heart of Catholic education is the Gospel."

Research Questions

The data in this historical case study was gleaned in order to answer the two questions central to the study:

1. How did the Sister-educators from one community in Northeast Ohio who were called to the principal's role prepare themselves for leadership?

They immersed themselves in the identity elements of their community, both tangible and intangible, and discerned their call to leadership by attending to the values inherent in their community's spiritual charism, the most powerful of which was love. They were nurtured and grown.

2. When it became clear that the future of their urban school depended on transitioning to lay leadership, how did Sister-principals prepare their religious communities and their school communities for that change?

They discerned, through and by love for their community's influential charismatic identity, to find faith-filled, values-based lay leaders to take their place, and they mentored them with magnanimity to advance the school's mission.

These questions were answered fully by the six interviews by women from the single case community. Their vocation stories, several of which spanned 50 years, two

121

centuries, a Vatican council, and a latter day inquisition (Hooper and Woolf, 2014;

McGuiness, 2013; Mongoven, 2009) reflected the values that Schneiders (2011)

intimated would encourage successful transition in sponsored institutions. Their

distinctly religious and feminist consciousness espouses inclusivity as an ideal and

empowers all participants to share responsibility and authority (p. 25). The schools that

grow out of this awareness are created new in the spirit of cooperation and commitment

to the challenges facing Catholic education in multi-faith, multiethnic urban centers. The

tenets upon which Sisters rested, such as the strong social justice ideology referenced by

the participants, influenced their professional growth, their organizational leadership

framework, and their resource management (Rawe, 1991, p. 92). These modern Sisters

balance the needs of the individual women religious as she advances the mission and

charism of the community (p. 102) with the need of the community to respond to the

needs of those it serves.

The Sisters' lived experiences in dealing with pastors, as detailed in this study,

echoed Caruso's (2012) data as it pertained to the transition to laity leadership in K-8

schools. The pastors that the Sister-principals encountered were assigned to some of the

most economically challenged and racially diverse parishes in Cleveland. In the

uncertain post-Vatican II cultural and religious climate, these priests recognized early on

that their success as parish leaders was wholly and unavoidably intertwined with the

growth and stabilization of their parish schools. However, this realization didn't always

mean that that an individual pastor gave his Sister-principal and her faculty the freedom

to make choices without his oversight, especially on admissions or funding issues.

Collins (2014) detailed similar challenges New Zealand Sisters experienced with what

she described as "carving out" leadership spaces for themselves. In parish schools staffed by women religious from a single community, the managing priest wielded enormous authority; as Collins noted, "the relationship... was a complex one involving as it did issues of authority, gender and money" (p. 82). Sometimes, however, a religious got lucky and was assigned to a school with a cooperative pastor. Sister Mary Jane recalls,

> And the pastor was —. This was so unusual. He called me and invited
> and all the other Sisters out to dinner because he wanted to get to know us.
> *He really let me run the school the way I thought was best* [emphasis
> added]. He backed me up. I mean, not that we didn't disagree sometimes.
> But he really backed me up.

Sisters in secondary school leadership in particular have the freedom to use their professional and spiritual judgment to manage difficult or unpopular problems to protect the mission of the school because the schools are not attached to parishes; Sister-principals are beholden to their community and their community of faculty, students and families, but not a pastor (Blenkinsopp, 1995). Nowhere was this more evident than in Sister Joan's riveting story of actively focusing on integration initiatives of her community's school during her self-described "reign of terror" as a new principal; she responded to both the call of her community to create an equitable environment as well as that of her own prayerful conscience. Sister Joan led the charge of social justice even in the face of uncertainty or disapproval.

> At the same time, then, our school was becoming more integrated. That
> was a difficult time. I'm an alum of this school and there were other alum
> who was conscious of the racial mix. There were community members

who were very pro-... "let's get this to be a diverse school." In fact, I used

to want to turn the phone off. The alum in favor of diversity and the those

who weren't... during my "reign of terror..." The community was very

much in favor of the school accepting any student who met the

qualifications. The Sister in charge of the schools at the time was very

aware of what we were facing and she was very adamant about making

sure I was not making up criteria that would exclude… she was a dog

with a bone. I knew I had to push through it... this is how the school will

continue to grow.

The use of an ideological paradigm to advance the mission of a school recalls Rawe

(1991); Sister Joan's first decision as principal was to "acknowledge I didn't have all the

answers to all the questions" and in doing so she emphasized her commitment to the

collegial process and underscored her valuing the collective experience (p. 1). Sister

Joan also took what Rawe called an "activist" role in both her professional work and in

her community life as she led her school through an inevitable, just and carefully

navigated course through the murky cultural waters of developing a diverse student

population.

The Theoretical Framework and The Interpretive Framework: Knowledge Transfer

and Constructivism

This study explored the theoretical framework, knowledge transfer, by and

through which Sisters communicate their charism and values to others. This is especially

true for lay personnel who will assume leadership in community-sponsored Catholic

schools. The way in which knowledge transfer appears in the transition process varies

from passive (daily modeling by lived example) to active, such as involving Sisters, lay faculty and even students in committee work grounded in charismatic education, mission-driven programming and careful cultivation of both leadership and school culture. In this way, the activities the case community is using to implement knowledge transfer align themselves with the interpretive framework for this study, constructivism. The emic insiders (Sisters) collaborate with the etic outsiders (lay professionals) to advance knowledge about the congregation's mission and vision. The new reality that lay professionals experience and internalize, embedded in the Sisters' legacy, is a blended one that reflects the lived experience of every Sister who worked in that context (Guba and Lincoln, 1994; Bruner, 2004; Ponteretto, 2005).

Collins and Allender (2013) used knowledge transfer to describe the way in which intellectual and cultural transmission from one context to another occurs in the areas of "schooling practice, educational theory, ethnic identity, literacy and numeracy testing modalities, conceptions of citizenship, cultural transmission through school texts, as well as new pedagogy" (p. 114). Collins in particular has been instrumental in documenting the work of women religious in post-colonial New Zealand as the country transitioned away from a mainly superimposed white European culture to one in which the Maori indigenous voice has surged to the fore (Fox, 2012). Knowledge transfer in a post-colonial Catholic school context takes on powerful meaning, since religion is one of the markers of whiteness against which so many first peoples have resisted. Collins's work has also addressed gender in a way that also speaks to knowledge transfer, because she acknowledges and explores not just how Catholic religious communities function in her country, but how religious communities of women function in, really, two linear

125

patriarchal hierarchies: one Catholic, one imperialist. Accordingly, women religious

have increasingly become invested, as Schuster (2012) observed, in nonhierarchical

leadership models which reject not only traditional Catholic organizational structure but

certainly the top-down administrative standard which can drive urban schools in

challenging contexts.

In the research case, as Sisters are present in their sponsored schools as teachers

and leaders—or, as in many schools, as board members, tutors, part-time advisors, or

maybe just visitors at special events such as fundraisers, reunions and remembrances—

there is overlap in the theoretical and interpretive frameworks. There is a strong

connection between the originating contexts and further iterations at other times and/or in

other settings because the relationships between religious and laity are personal,

organized and actively reciprocal. Cultural identifiers which are valued in knowledge

transfer, such as traditions, beliefs, leadership values and styles, comprise artifacts of (in

this case) Catholic school culture. These can be directly taught to others and modeled by

living Sisters in their work with their schools as strategic legacy planning. To test this

framework, the researcher asked each participant what she felt would be her personal

legacy to her school in the hopes of identifying those elements that would meet, for lack

of a better term, the criteria of "intellectual and cultural transmission." Perhaps it would

be an event tradition, or more information about the aforementioned Mission integration

team. However, Sister Mary Jane expressed her hope for her legacy when she explained,

through tears, the meaning of her school's chapel decorations, including windowpane art

and the tabernacle, which she personally oversaw during a renovation/addition campaign

to the space while she was principal.

My legacy was to leave in that chapel and to leave there who we are as —
[community]. This is our legacy when we are gone. You can tell the story
through the pictures if you know the women. And then the tabernacle . . .
it's like a house and around it are figures... last is a — student. I would
say to the girls; these are women who came before you. These are your
foremothers. These are the people you need to be like. I firmly believe
that… I'm sorry… *that is a legacy that when we are no longer there and
there are no Sisters that story will go on through those girls. The picture
will tell the story* [emphasis added].

Figure 5 illustrates levels of connectedness between sponsoring community and laity in
schools.
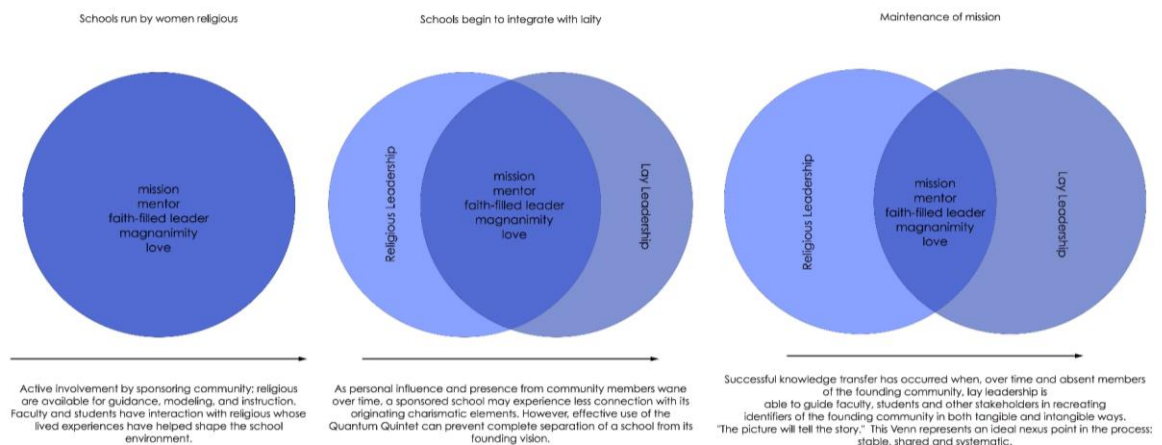
Figure 5. Venn diagram of religious and lay connectedness.

What is critical to understand is that knowledge transfer, when implemented successfully,
never yields a flat reproduction or mere rote retell. Knowledge transfer, as Steiner-
Khamsi (2004) noted, is borrowing, not copying; context is always applicable, and that
must include time, not merely place. It is also alert and animated, not passive and

sluggish. Sister Mary Jane's charismatic story is one with which she has intimate knowledge and lived experience—over forty years of living in community as she ministered lovingly and with intent. The story that students at her school will tell, and indeed all the students at all the sponsored schools will tell, will be absent the power of a Sister's first-person narrative. Its essential meaning, if knowledge transfers to lay leadership has been successful, will tie students in that future time to Sisters of the past in their understanding of vision, mission, and values. The intermediary laity will be the conduits through which these things will be transmitted to future faculty and students, and in that way Sister Mary Jane's wish will become a reality. The referent chapel art will not simply be an abstract symbol of her community's charism, but a tangible example of it, one that is both constant and fluid, static and dynamic.

The interpretive framework in this study, constructivism, necessarily represents and encompasses a duality. The teller and the listener—Sister and researcher, Sister and laity, laity and student—create a binary that is reciprocal in meaning-making and, in fact, necessarily so. The teller who has no audience in the listener has no story to tell; the narrative cannot exist in a void. Guba and Lincoln (1994), Bruner (2004), and Ponteretto (2005) have advanced that truth and reality are constructed from the stories of lived experiences, and in this way constructivism is a complementary interpretive structure to the theory of knowledge transfer because a story must be constructed *with* someone and *to* someone. Artifacts, identifiers, and values which are held up as exemplars of a mission or vision from the transmitters to the receivers—Sister-principals to lay-principals—will be borrowed into the future in new contexts and will retain their power if they are both well-constructed and well-communicated. Charismatic elements, if

transmitted successfully over time from Sisters to lay professionals through the theory

and process of knowledge transfer, will allow authentic expression of these essentialized

factors even when Sisters are no longer present as faculty, school leaders or even

advisors, board members or welcome, if infrequent, visitors.

Policy Recommendations and Opportunities for Future Research

In light of the findings of this study, several recommendations can be

made to urban Catholic schools that are in leadership transition. These

recommendations could also be applicable to other organizations which desire to

change their leadership model to one which is more servant-leader driven and

values-based. First, during a leadership shift (either from religious to lay, or lay

principal to a lay principal who is one or two generations removed from a

religious) search committees from a community-sponsored institution should

revisit the originating vision and mission of the school with members of the

congregation. Interviews with Sisters, Brothers, and/or priests from societies

which sponsor schools are essential in yielding important data about their identity,

discernment processes, responses to community influence, charismatic values and

understanding of the role of love in decision-making, "friend-raising" (to quote

Sister Beth) and organizational behavior. While Gospel values may impart

guidance for these schools generally, specific elements, values and gifts

idiosyncratic to the originating order, such as "Educators in the Faith" (Brothers

of the Holy Cross), "Ad maiorem Dei gloriam; For the Greater Glory of God"

(Society of Jesus), "We agonize over the sufferings of our sisters and brothers

around the world and for Earth herself" (Sisters of Mercy of the Americas), or

"Work for justice and act for peace because the Gospel urges us" (Sisters of Loretto) are important to for lay leadership to understand, share, and actively model, hopefully under the guidance of vowed members of the respective communities.

Second, the importance of the role of a Mission Integration Team cannot be overstated in sponsored schools. Even a team of four—an administrator, a member of the community, a faculty member and a student—could plan regular events and educational experiences to advance mission, mentoring and magnanimity to all stakeholders. The roles would be reciprocal; at any time, an insightful, spiritually centered student is a teacher for others, the member of the community, a student of how laity needs to be taught difficult theological and charismatic concepts. This philosophy mirrors McClelland's (1996) assertion that wholeness in Catholic education is when a holder of dogmatic and doctrinal knowledge shares that message with others. It is not merely an obligation to share this mantle; it is a privilege to do so (p. 156). "Mission integration" isn't a noun, a title. It is an active, purposeful, determined verb and with consistent personnel cultivation and attention a standing committee in a sponsored school can be an agent of mission preservation for all stakeholders well into the future.

Third, "principal's seminars," held at regular intervals (monthly, quarterly) could be a useful tool for a school leader to continue to act as charismatic teacher in a variety of academic disciplines—theology, certainly, but also many of the humanities, such as social studies, English, or art. An historical seminar could be focused on the life of a community's founder and include perhaps a daylong service project that supports the vision of the sponsoring congregation either through corporeal or spiritual works of

130

mercy. These could be interdepartmental as well, combining with Campus Ministry for a

wraparound academic and catechistic experience. Another idea would be to have the

principal focus on Year 1 (freshman) mission goals, Year 2 (sophomore) mission goals,

etc. with respect to developmental mentoring. The purpose would be to connect

meaningfully with classes of students through the teaching relationship and lead them to

focus forward on the mission of the school in its present context. A principal is an

instructional leader; holding seminars is one way for a principal to remain active as an

educator and avoid slipping into the haze of day to day school operation.

Finally, faculty professional development in the charismatic elements of a

sponsored school is an essential programmatic implementation. Classroom teachers in all

content area are, according to all the participants in this study, agents of the charism and

mission of a school founded on congregational charismatic principles. As Sister Angela

noted, sharing fully with faculty the mission and vision of a community is the spiritual

glue of a sponsored school, and it has to be continually touched up, refreshed and

reengineered in order to remain both stable and transparent.

> Experience it with them. Retreat days. Prayer time during Advent and
>
> Lent. When there's a crisis situation if someone is sick, like yesterday...
>
> the staff gathered during their lunch period for a half hour to pray. They
>
> popped in. Using their lunch hour. Prayer time in the morning. We do
>
> the Jesuit Examen every day. Using those times, and *my teachers knew*
>
> *they could talk to me* [emphasis added].

The relationship between a principal and faculty must be transparent, invested and

grounded in love and respect. One assurance that most of the participants vocalized was

131

that there was not an absolute need for Catholic school faculty to be Catholic. Sister

Angela, again, preferred that the principal be Catholic, but as for teachers,

> I had a non-Catholic 8th grade algebra teacher who was more Catholic
>
> than some of my Catholic teachers! So, having one or two… you know,
>
> my intervention specialist is Christian, but not Catholic. She is awesome.
>
> She lives her faith so, and she is active. I can live with that.

Sisters Joan and Erin Brown affirmed this position. Faith-filled faculty who are actively

modeling the core values of a community, even if they are not Catholic, are front-line

stewards of charism, and their lay principal peers can be conduits of an energetic, spirited

transfer of essential vision, mission, values, identity and discernment processes.

There are ample opportunities for future research on schools sponsored by women

and men religious in not only education history, but in Catholic school historiography,

school culture studies, and school administration. Case study would again be a good

qualitative approach, but life history on specific school leaders or ethnography on a

particular school's culture over time would be useful and revealing. The researcher

herself is interested in replicating this study with a community of men religious who have

been in the city a similar length of time to compare findings and explore the role of

gender in knowledge transfer, leadership cultivation and lay administration in their

sponsored schools. The researcher would also be interested in comparing a community

of Brothers as opposed to a community of priests and see if hierarchy in the Church

makes a difference in their respective approaches to school culture, educational

philosophy and knowledge transfer.

From an historical perspective, there have been several fortuitous links between the development and execution of this study and larger issues happening both in the Church and in American cultural life. First, the aforementioned "inquisition" into American women religious had its denouement during the organizational period of this project between 2012 and 2015. Every Sister in the study mentioned it, every Sister in the study resented it, and every Sister in the study seemed to be affected by it in both positive and, unfortunately, negative ways. A study into the aftereffects of the Vatican investigation into religious life would be a valuable enterprise, but not too soon; Sister Erin Brown noted that she is still coming to terms with her reactions to the experience, and suggested to the researcher that perhaps more time needed to pass before asking women religious for their impressions, responses and resulting plans. Second, Pope Francis declared that from November 30, 2014 to February 2, 2016 the Church would celebrate the Year of Consecrated Life (YCL) (United States Conference of Catholic Bishops, 2017). Programming for this year was designed to highlight the work of religious as models of "perfect charity." Whether vocation work by communities during this time yielded interest among young men and women to explore the "countercultural" (to use Sister Therese's word) life of religious would be worthy investigation. Relatedly, an exploration of recent vocations into LCWR communities as compared to CMSWR communities would be useful. It is important to identify characteristics of who is the young woman in 2017 who chooses a more traditional community over a community that is less so: what is her background? What are her beliefs about service, faith and leadership? How does she view gender and power in the Church? What does she understand about identity? Questions such as these can be explored using a critical

feminist theory to add to the body of knowledge about women's agency, choice and self-determination in a postmodern American culture.

Given the strong and obvious religious underpinnings in these recommendations for future research and of this study generally, it might seem that a public school would be unable to implement any of them without violating not only local policy, but certainly federal law. However, a Mission Integration Team (MIT) could be organized in any school in order to have direct, meaningful and purposeful interaction with the stated mission goals of the district. Whether a district's mission is to "nurture, educate, and graduate students who are civic-minded and prepared to make ethical decisions" (Shaker Heights), prepare "critical and creative thinkers, committed to life-long learning, invested in a diverse society" (Lakewood), or to ensure that all students are prepared to "serve as responsible citizens in a global society" (Garfield Heights), urban districts all over Northeast Ohio—and indeed, in any urban center in any state—could harvest enthusiasm and commitment by students and faculty by strategically empowering an MIT in each building to create active and developmentally appropriate programming. A second way in which public districts could implement recommendations from this study would be to support principals' growth not merely professionally, but quasi-spiritually as discerned decision-makers, mediators, and leaders. Going on the premise that the principal sets the tone, as Sister Joan noted, it is worth a district's the investment, then, to ensure that each person holding this office in every school is emotionally mature, grounded in service, and avoidant of the hubris that so often comes with power.

Finally, this study could not come to a close without an acknowledgement of the profound impact it has had on the researcher. After a lifetime in educational settings as

134

both a student and educator, it's humbling to realize how much about a being a true teacher-leader I am still learning from women such as the ones I have met here. The importance of discerned decision making in education alone, I have found, could fill its own book. The first rule of loving every student holistically and not reducing him or her to labels—the "smart" one, the "difficult" one—is one that these Sisters have imparted to me and one I am trying, certainly, to infuse daily in my professional practice. The insistence on demanding justice for all students, as Sister Therese and Sister Erin Brown especially do, has been a sweet little jingle bell for me for some time, but it has grown into a full scale church bell, its clanging peal sending an unrelenting call. I can only control my change in my own little world, but hopefully my example will create enough buzz to attract like-minded educational leaders, writers and policy makers so we can share and promote this philosophy together. I hope that my model, the Qu5 (which sounds James Bond-ish, I realize) will impact all mission-driven organizations in leadership transition in a positive and useful way so that their service work can continue with fidelity and constancy. Finally, I want to let all women religious—teachers, nurses, movers and shakers, the Nuns on the Bus, missionaries, those in the contemplative life— know that their work is deeply appreciated and their life stories are untapped treasures. I wish I could interview all of you. That I have in a small way been a steward of this community's history in Cleveland is a privilege I will never take for granted.

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APPENDICES

APPENDIX A

CORRESPONDENCE TO NE OHIO COMMUNITIES OF WOMEN RELIGIOUS

To: — (community); Thu 12/10/2015 6:27 PM

I hope this Advent seasons finds your community healthy and happy as we look forward to Christmas. My name is Sarah West and I am a 4th year doctoral student in Urban Education at Cleveland State University. I am in the final stages of preparing my dissertation topic, which focuses on transitional leadership in urban Catholic schools. I am interested in interviewing women religious who have been principals of K-8 and/or 9-12 schools about their professional and vocational development. I am especially interested in Sisters' experiences in educational leadership and the challenges they faced in preparing their schools for lay leadership.

If there are any Sisters in your community who would be willing to participate in my study, please respond to this address. I am planning on conducting interviews in the Spring. I will travel to Sisters at their convenience. I can provide more information about the study, including informed consent documents and other pertinent information, when an opening date for it is finalized. I expect this to be not later than March 1.

Thank you so kindly for your consideration. Merry Christmas!

Sarah M. West

APPENDIX B

INITIAL INTERVIEW QUESTIONS

1. Describe the process of your vocation to religious life and teaching life.

2. Describe the process of your education as a teacher.

3. Describe the process of moving from the classroom into administration.

4. Describe what you see as the significance of a community sponsored Catholic school in an urban setting.

5. Describe the process your community undertook (or is the process of undertaking) in order to create succession planning for your school(s).

6. Describe, in your observation, what the key issues are in effecting successful transition from the Sister-principal model of governance to a lay principal model.

7. Describe what you feel your personal legacy will be in the transition of your school to lay leadership.

INFORMED CONSENT DOCUMENT

"SERVIAM": A HISTORICAL CASE STUDY OF TRANSITIONAL LEADERSHIP
IN URBAN CATHOLIC SCHOOLS IN NORTHEAST OHIO

Dear Participant:

My name is Sarah M. West and I am a 4th year doctoral student in the Urban Education PhD program at Cleveland State University. I am working with Dr. Marius Boboc, who is a member of the College of Education and Human Services faculty and the chair of my dissertation committee. For the purposes of this study, Dr. Boboc will also serve as the Principal Investigator (PI) for this project. The purpose of the study is to explore how Sisters-educators in urban Catholic schools discerned their call to leadership as principals, and to explore how Sister-principals prepared their communities and schools for transition from religious leadership to lay leadership.

We are asking you to participate in this research project. The study first consists of an interview with you at a time and place most convenient to you. The semi-structured interview will occur one time for 60-90 minutes. I will facilitate the interview. I will record your interview by electronic recording device as well as take notes. I will ask your permission before recording the interview. Your interview will be given a code number and I will be the only transcriber.

I will contact you via telephone after the transcription is complete and ask your permission to present it back to you for you to read. I can present it to you in person, via ordinary mail, or via email and PDF.   This is your opportunity to correct any errors in the transcription. I may ask you to clarify certain points in the transcription to ensure authenticity. The second stage will not take longer than 60 minutes of your time and we will agree on a date by which you will have any corrections to me.

All your responses will be kept confidential and only members of the research team will have access to either the transcripts or the recordings. This is to ensure your confidentiality and privacy. Excerpts from the interview may be included in a final report or related reports during and after the study. Your name will not be attached to the interview or transcripts or any subsequent reports.

Your participate may involve benefits, such as the opportunity to reflect and gain additional insights concerning the process of leadership discernment and the means by which religious communities plan for leadership transitions in their sponsored schools. It may also involve discomfort concerning aspects of your experience as it relates to this topic, but there are no known risks other than those associated with everyday living. Your participation in this study will contribute to a better understanding of this topic for future teachers, leaders and researchers in this area of educational studies.

Your participation in this interview is completely voluntary. You are free to stop at any time or decline to answer a question. Should you agree to have the interview audio-recorded, you may decide to turn off the recorder at any point during the interview. You may ask any question about the study at any time before, during or after the interview process.

If you have any questions about this study, you may contact me at 216.687.2279 or Dr. Marius Boboc at 216.687.4581. The Institutional Review Board at Cleveland State University can be reached at:

Cleveland State University
Institutional Review Board
Office of Sponsored Programs and Research
2258 Euclid Avenue
Parker Hannifin Hall
Cleveland, OH 44115-2405
216.687.2000

Very truly yours,

Sarah M. West
s.manville@csuohio.edu

I understand the Informed Consent document as it has been presented to me. I am aware of my rights as they pertain to this study.

_____

Name   Date