

Mercy Charism and Professional Development

by

Alison Mary Kline-Kator

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Doctoral Committee:

Professor Bonnie Beyer, Chair  
Lecturer II John Artis  
Associate Professor Stein Brunvand

## Dedication

I dedicate this work to my parents, my first and best of teachers.

## Acknowledgements

“A little bit of mercy makes the world less cold and more just” – Pope Francis

Pope Francis made his announcement of a Jubilee Year of Mercy in the Catholic Church about two weeks before I defended my proposal for this work. Completing this project during this Jubilee Year of Mercy was both fitting and providential. Deeply connected to mercy is the reality of hope. I am grateful to so many people for providing me with so much of both.

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## List of Abbreviations

CARA	Center for Applied Research in the Apostolate
CCE	Sacred Congregation of Catholic Education
CCC	Catechism of the Catholic Church
ILC	Institute Leadership Conference
JSEA	Jesuit Secondary Education Association
MIA	Mercy International Association
MSEA	Mercy Secondary Education Association
NCEA	National Catholic Education Association
NME	Network for Mercy Education
PLC	Professional Learning Community
RSM	Religious Sister of Mercy
USCCB	United States Conference of Catholic Bishops
XBSS	Xaverian Brothers Sponsored Schools

## Abstract

Catholic schools in the United States have experienced a shift in staffing during the last half of the 20<sup>th</sup> century, moving from leadership comprised of religious priests, brothers, or sisters to almost entirely laypersons. The term charism in the context of Catholicism refers to God-given gifts allowing individuals or group to live their faith in a particular way. The shift in staffing of Catholic schools has also resulted in the need to convey the charism of these schools in explicit and intentional ways. This dissertation examines the relationship between identification of charism and professional development in 10 United States secondary Catholic schools sponsored by the Sisters of Mercy and suggests a framework for effective professional development related to enhancing school staff members' understanding of charism. Results of survey research in this study show how the impact of professional development related to charism is related to a school's culture as a whole. Staff members at all schools identified elements of Mercy charism in their schools, and all schools offered some type of professional development related to charism. Variations in practice at the different schools suggest that while site-specific considerations are important, religious orders sponsoring more than one school should have an overarching structure to ensure a similar level of understanding of charism in their various schools. This study suggests mentoring, study groups, and collaboration with staff members at other schools as well as members of a religious order are effective tools for enhancing a sense of charism in a school community.

*Keywords:* charism, professional development, Catholic schools, lay leadership, induction programming

## Chapter 1

### Introduction

*“No work of charity can be more productive of good to society than the careful instruction of young women” – Catherine McAuley*

Catherine McAuley was born in the 18<sup>th</sup> century in Dublin, Ireland, to Catholic parents. Her father died when she was young, and her mother died when she was around 20 years old. It was not proper at the time for a young unmarried woman to live alone. She was taken in by Protestant relatives who, reflective of the time, did not approve of her Catholicism. Catherine then became a house manager and companion for a wealthy and childless Protestant couple. That couple, the Callaghans, eventually treated her as an adopted daughter, and respected Catherine’s practice of her Catholic faith. When the Callaghans died, Catherine eventually inherited their significant fortune. Concerned by the plight of poor young women in Dublin, she opened a House of Mercy in 1827 using her wealth to promote education for young women and assistance for the poor. Her original intention was that this House of Mercy, and others like it, be run by non-religious vowed (lay) persons. Her mentor, a local bishop, suggested that she might have more independence if she were operating as the head of a religious community. She and two other women made religious vows in 1831 and became the first Sisters of Mercy. The group’s focus was on performing works of mercy in the world, and paying particular attention to the needs of poor people, especially women and children. She established 14 foundations of women doing that work in Ireland and England before her death in 1841, and that work

continues in the present day through the efforts of Religious Sisters of Mercy, Mercy Associates, and various partners in ministry.

### **Charism: The Identity of a Religious Institute**

The term charism in the Catholic Church refers to the identity or character of a group. It is understood as,

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 recreated through the living testimony of its members (Dominican Sisters of St. Cecelia, n.d., “Characteristics of our Charism”)

Christians use these spiritual gifts to carry out a particular mission in the world. The particular ministries a religious institute will choose to sponsor relates directly to the charism of that institute.

### **Statement of the Problem**

Since the early days of the United States’ existence, Catholic schools have been part of the educational landscape. The 19<sup>th</sup> century model of structure and governance of Catholic schools, with each parish having a school and priests, brothers, and nuns comprising the majority of the workforce in them, has faced two major challenges in the second half of the 20<sup>th</sup> century: a change in the role of the laity, and a change in the structure of leadership of schools. The Second Vatican Council (Vatican II) had an impact on the 19<sup>th</sup> century model of Catholic schools. This series of meetings, convened in the 1960s,

was undoubtedly the most important religious event of the twentieth century to date. It brought some 2,500 of the top leaders of the world’s largest religious body together for

four three-month sessions for over four years and engaged them in debate on most of the vital religious issues facing mankind (Bokenkotter, 1990, p. 365).

The 1960s were a time of upheaval and change in various aspects of culture and politics in many parts of the world, and the results of Vatican II fit into those overall trends. One result of the council was an emphasis on a greater role for the laity in church life.

These faithful are by baptism made one body with Christ and are constituted among the People of God; they are in their own way made sharers in the priestly, prophetic, and kingly functions of Christ; and they carry out for their own part the mission of the whole Christian people in the Church and in the world” (Paul VI, 1965b, para. 31).

This recognition and redefinition of the role of the laity allowed for their greater participation in church life, and an acknowledgment that involving the laity in various ministries or church efforts was not only possible, but needed based on the very essence of who these people are.

Also, more lay movements have developed within the Church in the years following Vatican II.

Although the concept was not new, and such groups have been active in the Church throughout history, this time period saw a “new vitality in the development of various lay associations, groups, communities, and movements in the Church” (Shea & Eriksen, 2005, p. 19). As a result, persons wanting to do the work of the church in the world had more opportunities to do that as a layperson rather than in the consecrated life. The number of persons in the consecrated life, as well as students in Catholic schools, declined in the United States during this period as a result of these changes.

The structure of leadership in these schools has changed in recent decades (Hunt, 2005). Once run entirely or nearly entirely by religious priests, brothers, or sisters, Catholic schools in the United States are now led nearly entirely by lay (non-religious) persons (McDonald &

Schultz, 2012). This shift in leadership has meant that lay administrators now bear the majority of responsibility for conveying a school's sense of identity and also for transmitting any particular characteristics, or charism, of a school's founding order. Helen Amos, RSM<sup>1</sup>, noted to a conference of Mercy educators in 1983:

Justifiably or not, when our institutions were staffed entirely by sisters, we took pretty much for granted the hallmark of compassionate service. Today we find ourselves living under a mandate to find words with which to articulate this distinctiveness. Not only that, but we sisters sense a continual call to give example to our lay collaborators and to one another of the spirit that animates and defines whatever goes by the name "Mercy."  
(Amos, 1983)

Amos suggested that the charism of a religious institute is deeply understood by those inspired to join that group and live their lives according to the vision of that group. The charism of the group is embedded into their everyday lived experience. Often lay school leaders have had preparation in education and teaching, but not necessarily the extensive theology education and formation that priests, sisters, and brothers have. Speaking to Mercy educators, Carol Wheeler, RSM noted:

We need to acknowledge, for example, what you already know: the center of your life is not religious life in the Sisters of Mercy; you have been called to another vocation. Even if you understand your commitment to teaching as a vocation, even to teaching in the tradition of Catherine, your primary vocation is at least one step removed. (1995, p. 209)

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<sup>1</sup> The designation "RSM" stands for Religious Sisters of Mercy and is the abbreviation used by women who have made either temporary or perpetual vows as a Sister of Mercy.

<sup>2</sup> To facilitate reading, this group will be cited as Congregation for Catholic Education or CCE

Catholic school communities have had to develop new programs and responses to educate and prepare lay employees to be not only strong education leaders, but also ones who could help to maintain a school's Catholic identity (Nuzzi, n.d.).

Mercy schools are currently in the process of developing a new organization to govern its schools. Currently, the sponsored schools in the United States are responsible to the leadership of their respective community. Mercy educators from these secondary schools began meeting annually in 1981 after informal discussion about the "untapped potential for collaboration among Sisters of Mercy and colleagues in the ministry of secondary education" (Heberle, n.d., as cited in Mercy Secondary Education Association [MSEA], 2001). This group became known as the Mercy Secondary Education Association (MSEA) and stated that its purposes were

to further the Mercy charism in secondary schools; to develop a statement of common philosophy and goals; to enhance a sense of national identity to provide for collaboration in areas of identified need and interest; to foster dialogue among RSMs and with others involved in the ministry of secondary education. (Heberle, n.d., as cited in MSEA, 2001)

Executive board members of the MSEA planned and implemented the annual conference. The first lay member of the board was elected in 1985 (Heberle, n.d., as cited in MSEA, 2001), although by-laws stated that the majority of board members were to be Sisters of Mercy.

Members of the MSEA modified the bylaws in 1997 to eliminate this stipulation. Several business meetings before MSEA conferences addressed the idea of sponsorship as the Institute began the slow process of reorganizing its regional communities. The Network for Mercy Education formed in 1999 "to further the Sponsorship process and program for education and formation" (Network, n.d., Network Overview). The Network's goals are

to develop written and audio visual materials for local use to further education and formation on the charism, core values and tradition of Mercy; to develop and enhance Network initiated programs which foster collaboration among Mercy educators and their schools; to develop and enhance Network initiated programs designed to promote leadership formation for Mercy educators and administrators. (Network, n.d., Network Overview)

Members of the MSEA voted in 2010 to dissolve the MSEA, creating a standing Mercy Secondary Education Conference Committee as part of the Network. This decision was made in response to the reality of financial holdings and in order to “meet current and future needs for planning” (Raven, n.d., as cited in Network, n.d., MSEC). The Institute Leadership Conference (ILC) (leadership of the Institute of the Sisters of Mercy of the Americas) supported a visioning process for schools beginning in 2012 with the purpose of “envision[ing] one Mercy Education System organized under an Institute-wide governance model with appropriate international dimensions” (Institute Leadership Conference [ILC] to Sisters, Associates, and Companions, December 12, 2014). The ILC noted that through this process they saw that “our lay colleagues are carrying the responsibilities and complexities of leadership in Catholic education and need one another. More and more, our lay colleagues desire a system and degree of accountability that will enable them to better strengthen one another” (ILC to Sisters, Associates, and Companions, December 12, 2014). The ILC affirmed in October 2014 “there will be one Mercy System of Education organized under the Institute’s *Public Juridic Person* with governance and administrative components” (ILC to Sisters, Associates, and Companions, December 12, 2014). A goal of the system is to “insure that Mercy sponsored, cosponsored schools and educational ministries are identified within the mission of the Catholic Church and are faithful to the

charism, mission, core values and tradition of the Sisters of Mercy” (Mercy Education Leadership Committee to Sisters, Associates, and Companions, April 16, 2015). The ILC supported the creation of a committee to begin the work of implementation of the system. This committee hired a full-time project director (a Sister of Mercy) and created several task forces to shape the system related to the areas of Governance, Leadership Formation, Mercy Education Standards/Accreditation, Financial Sustainability, Programs and Services, International Realities, and Innovation and New Initiatives (Mercy Education Leadership Committee to Sisters, Associates, and Companions, April 16, 2015). The Mercy Education Leadership Committee outlined in October 2015 several assumptions underlying the new governance relationship. Accountability is critical to the success of the system, as is adequate funding and services. There is a commitment to both Catholic identity and Mercy identity, and a commitment to working with lay persons. “This partnership and this new system is not about the shifting demographics of the Sisters of Mercy; Rather it is about the gifts, the skills, the leadership and commitment that our lay partners demonstrate for Mercy ministries that we want to preserve, enhance and deepen” (Weber, 2015). It cannot be denied, though, that this movement is happening in the context of declining numbers of sisters.

### **Purpose of Study**

The purpose of this study will be to examine how Mercy charism is conveyed to staff members in Mercy secondary schools in the United States, with a particular focus on professional development, including induction programming for new staff members. This study will identify characteristics of the Mercy charism which are conveyed to staff members, and which are seen as indicative of Mercy education. As a result of the study, the researcher will

propose a model of professional development for school communities seeking to convey or reinforce aspects of their school's identity.

### **Background: Catholic Schools in the United States**

This study focuses on a subgroup of Catholic schools in the United States. Catholic education in the United States has changed over time. Private academies emerged in the United States' colonial period as a way to teach children classics, languages, or other skills. Religious missionaries established schools in places such as Florida at the same time with the intention of growing the faith while fostering literacy. In the following decades, religious schools continued to serve students. The number of Catholic schools grew in the mid-19<sup>th</sup> century as waves of immigrants came to the United States from Western European countries such as predominantly Catholic Ireland. Public schools were perceived as furthering Protestant ideals, so Catholic schools were a way to keep communities together and educate Catholic children in a non-Protestant environment. The First Plenary Council of Baltimore stated in 1852 that every Catholic parish should seek to open a school for children within the parish (Fanning, 1907). Catholic schools became the largest provider of private education to students in the United States as a result of this push. The amount of both Catholic schools and students in them peaked in the 1960s in the United States (Bryk, Lee, & Holland, 1993). Assimilation of Catholics into mainstream American life and migrations from urban areas to suburbs (and quality suburban public schools) contributed to a decline in the number of Catholic schools (Sugrue, 2012). Today, Catholic schools represent the largest percentage of private schools in the United States, although that trend is shifting slightly as enrollment in Catholic schools has declined in recent decades, and enrollment in nonsectarian private schools has increased slightly. About 50 percent of private elementary school students, 74 percent of private secondary students, and 8 percent of

private combined K-12 school students were enrolled in Catholic schools during the 2011-2012 school year (United States Department of Education, 2014). Enrollment in Catholic schools includes Catholic and non-Catholic students (McDonald & Schultz, 2014).

**Mercy schools in the United States.** Sisters of Mercy arrived in the United States in 1843 and worked to care for the sick and poor in various cities. They also continued to focus on education for young women as Catholic education grew in American communities. Mercy schools for both poor and middle-class students were flourishing in Ireland, and sisters in other parts of the world disagreed about whether or not tuition-based schools were detracting from their ability to serve people who were poor. The socio-economic reality in the United States was that Sisters of Mercy (as well as those of other religious institutions) were “thrown on their own ingenuity for financial support” (George, 1982) as they did not receive that support from the parishes in which they worked. Educating students who had the ability to pay was a way to continue their work. Guidelines for community superiors issued in the 1860s noted that although serving the poor was a particular focus for the Sisters of Mercy, that focus did not, on principle, exclude other good works such as operating tuition schools (Sullivan, 2006, p. 23). The NCEA noted the presence of 541 private (sponsored by a religious order/institute or private corporation) secondary schools in the United States in the 2013-2014 school year (McDonald & Schultz, 2014). The Sisters of Mercy of the Americas sponsor or co-sponsor 30 secondary schools in the United States: 25 sponsored schools for students grades 6-12, two sponsored schools which are Pre-K-12, and three co-sponsored schools (two secondary, one grades 5-12). The Institute also sponsors eight elementary schools in the United States and 11 international schools. (Network, 2015).

**Authority over Catholic schools: Church hierarchy.** Policies for schools can come from a variety of sources. Public schools in the United States fall under national, state, and local authorities. Catholic schools in the United States also fall under various religious authorities. These groups may, at times, disagree about the particular aspects of Catholic identity or charism that are most important for a school to emphasize. The schools in this study shape their own institutional sense of identity in the midst of these various influences. The hierarchical organization of the Catholic Church is centered in the Vatican, or Holy See. Various groups known as congregations are “administrative offices that assist the Pope in his role as pastor of the universal church” (Ford, 2006, p. 49). Pope Sixtus V began a congregation in the 16th century to supervise various universities. Pope Leo XII founded a congregation in the 18th century that supervised schools within the Papal States, and later Catholic universities. The group has had different titles (such as the Sacred Congregation for Catholic Education) and responsibilities in subsequent years, but has been known as the Congregation for Catholic Education<sup>2</sup> since 1988. The Congregation has authority over institutions such as seminaries and ecclesial universities, as well as “over all schools and educational institutes depending on ecclesiastical authorities” (Congregation for Catholic Education [CCE], n.d., “Profile” para. 5).

The Pope is the titular head of the Catholic Church hierarchy as the spiritual leader of the church as well as the political leader of the Holy See. The worldwide church is divided into more than 3000 different administrative jurisdictions, most of which are known as dioceses or archdioceses (Cheney, 2015). Bishops (including the Pope as the Bishop of Rome) control dioceses, and their primary responsibility is “authentically teaching the faith” (Catechism of the

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<sup>2</sup> To facilitate reading, this group will be cited as Congregation for Catholic Education or CCE throughout this paper, even in discussions of documents written before 1988.

Catholic Church [CCC], 1994, para. 938). Various regional groups of bishops exist in different areas of the world. The United States Conference of Catholic Bishops (USCCB) serves as such a group in the United States. Comprised of all bishops in the United States and the Virgin Islands, the group has three main goals: “to act collaboratively and consistently on vital issues... to foster communion with the Church in other nations... and to offer assistance to each bishop in fulfilling his particular ministry” (United States Conference of Catholic Bishops [USCCB], 2015, “USCCB Mission,” para. 1). Various committees in the USCCB make decisions regarding programming or interpretation of doctrine. One such committee is the Committee on Catholic Education, which “provides guidance for the educational mission of the Church in the United States in all its institutional settings” (USCCB, 2015, “Mandate and Goals,” para. 1)

**Authority over Catholic schools: Religious institutes.** The clarity of the hierarchical picture is muddled by the presence of other religious organizations. People can choose to live in a state known as the consecrated life, in which members take and live by vows of poverty, chastity, and obedience. Those in consecrated life in the Catholic Church are part of religious institutions, “societ[ies] in which members, according to proper law, pronounce public vows, either perpetual or temporary which are to be renewed, however, when the period of time has elapsed, and lead a life of brothers and sisters in common” (Code of Canon Law, canon 607 § 2). Religious institutes are often gender-specific. Male members of religious institutes can be ordained clergy (priests, deacons, brothers), and female members of religious institutes are known as sisters or nuns. Religious institutions have physical presence in dioceses, but often their ministries are managed by the institute rather than having direct oversight from the local bishop. Institutes will often describe this as “sponsorship” of various ministries (Caretti, 2013). Institutes vary in size and organizational structure. Some institutes may be highly organized

worldwide, with one leader for all members worldwide. Others may have less worldwide structure, with various organizations existing on more localized levels.

The term *public juridic person* in Catholic canon law refers to aggregates of persons or of things which are constituted by competent ecclesiastical authority so that, within the purposes set out for them, they fulfill in the name of the Church, according to the norm of the prescripts of the law, the proper function entrusted to them in view of the public good.” (Code of Canon Law, canon 116 § 1)

Recognizing a group or ministry as a *public juridic person* shifts the formal sponsorship of that group or ministry from an original sponsoring entity (such as a religious institute) to the ministry itself. The term is analogous to a secular civil corporation.

**The Sisters of Mercy: An example of institute.** Religious Sisters of Mercy are present in more than 40 countries worldwide (Mercy International Association [MIA], 2015, “Mercy network,” para. 1). These sisters take an additional fourth vow of service to the poor, the sick, and the ignorant (or the uneducated) in addition to the vows of poverty, chastity, and obedience taken by all people in consecrated life. The organizational structure is more localized – there is no central leader worldwide. Sisters are part of various congregations, federations, and institutes. Some groups, such as the Sisters of Mercy of the Americas (an institute), are large geographically, while others, such as the Sisters of Mercy of the Union of Great Britain, are smaller. Members of those various groups formed the Mercy International Association in 1992 to “foster unity of mind and heart among Sisters of Mercy and... to facilitate collaboration” (MIA, 2013, “About us,” para. 1).

When Sisters of Mercy arrived in the United States, they immediately began working with people who were sick and poor. Less than 20 years later, communities of Sisters were

working in four other geographical areas across the United States. The groups of sisters in each location were considered independent organizations. Sisters combined these organizations in 1991 to form the Institute of the Sisters of Mercy of the Americas. The intention of the creation of the Institute, in the spirit of Catherine McAuley's faith-filled and practical nature, was to provide the sisters with common direction and management of resources. The 26 regional communities consolidated into the six current regional communities in 2008 in order to enable sisters to "better focus our lives, resources, and mission on traditional and emerging needs in today's changing economy" (Sisters of Mercy, 2006, "Institute," para. 4). The Institute's communities are known as Northeast, New York/Pennsylvania/Pacific West, Mid-Atlantic, West/Midwest, South Central, and Caribbean/Central America/South America. The Institute is led by an elected group of sisters, and each regional community has its own leadership team of sisters as well. Current conversation among the Sisters of Mercy is the idea of "one leadership team for the Sisters of Mercy of the Americas by 2023" (Institute Leadership Conference, 2015, para. 5). Ministries of the Sisters of Mercy include hospitals, social agencies, and schools. In 2014, more than 15,000 students enrolled in schools sponsored by the Sisters of Mercy in the United States<sup>3</sup>. Each of the regional communities is a *Public Juridic Person* for the schools in that community, and the sisters elected to the leadership team are the corporate members for each school (Network, 2015).

### **Research Questions**

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<sup>3</sup> The researcher calculated this number by using enrollment information given on each school's website or school profiles on sites such as [greatschools.org](http://greatschools.org). A link to all Mercy-sponsored elementary and secondary schools can be found at <http://www.netmercyed.org/mercyeducation.html>

The central question underlying this study is: How is transmission of charism in Mercy secondary schools in the United States facilitated by staff development? Sub-questions addressed by the study are:

- a. How do staff members in Mercy schools understand Mercy charism?
- b. How do current staff professional development programs convey the Mercy charism to staff members at Mercy schools?
- c. How are the degrees to which staff members at a Mercy school identify with Mercy charism related to the amounts or type of professional development related to Mercy charism offered by the school?

### **Delimitations**

Delimitations describe the boundaries of a particular research project. Participation in this study was delimited to 10 Mercy secondary schools in the United States. Although these schools vary in terms of geographic location, enrollment, and sponsorship, results from these schools may or may not reflect conditions at the other Mercy-sponsored secondary schools, or schools sponsored by other religious orders. The study was also delimited to include the staff members at these schools, not parents or students. Although the goal of professional development is ultimately an improved learning experience for students, students do not participate directly in professional development opportunities. Rather, they benefit indirectly as professional development helps teachers to improve their teaching or the school environment. The researcher chose to include all staff members at schools in the study rather than just teachers or faculty because all staff members in a Catholic school are often included in spiritual formation activities. All staff members in a school also play a role in supporting education in the school.

This study was conducted with the use of online questionnaires. Such questionnaires do not allow for immediate follow-up questions based on a participant's response. The use of an online platform for the questionnaire requires a certain level of familiarity with technology in order to be able to complete it (Evans & Mathur, 2005; Illieva, Baron, & Healey, 2002).

This study is also delimited by its subjective nature. The definition of charisma for measurement in this study is an operational construct (see chapter 3 for further discussion). Measuring the presence of charisma in a school is different than, for example, counting the number of classrooms present in a school building. The researcher assumes for this study that the presence of charisma in a Mercy school is something that can be measured, and that its presence is positive for a school community.

### **Limitations**

A limitation of this study is the group of participants. Although administrators at each school gave permission for their staff members to participate in research, the survey was distributed to those staff members' e-mail addresses in various ways. Staff members who received the survey link forwarded from an administrator may have felt differently about participating at all or answering honestly as opposed to those who received the survey link directly from the researcher. Participation was voluntary, so those who chose to reply at each school do not necessarily represent a random sample of staff members at the school. Response rates were also different for each school.

The nature of the study is also a limitation. Two surveys distributed by e-mail comprised this survey. It is possible that other types of research (in-depth observations or interviews, for example) would further explain results of the surveys or present other insights that the surveys were not able to capture. A participant's attitude when taking the survey could also not be

determined. All answers were self-reported, so the survey results may not accurately reflect the views and behaviors of all staff members at a particular school.

Results of the study may also be affected by the times at which the initial survey and follow-up were administered. Life in a school usually seems busy, but there are some times that are busier than others. Periods such as the beginning of a term, end of a term, just before or just after a holiday, spirit weeks, or other times with multiple schedule changes often include extra work for school staff members. The researcher tried to be sensitive to these periods when distributing the initial survey and follow-up, but participation in the survey may have been affected by things happening in the school or larger community.

Communication with participants was conducted online through e-mail, and the initial survey and follow-up survey were distributed through e-mail as well. The survey included some open-ended questions as well a space for comments, but such spaces did not allow the researcher to ask questions to clarify a participant's response. The electronic distribution of the survey required participants to have working knowledge of their school's e-mail system, as well as the ability to navigate the online survey.

This study examines the relationship between identification with Mercy charism and professional development, but is limited in that the results cannot be generalized to other Mercy schools or other order-sponsored Catholic schools. Results of this study can be used as a suggestive guide by other schools to examine the nature of charism and professional development in their own buildings, but they are not predictive. Due to the design of the study, any relationships between variables in the study can be described as correlational rather than causatory.

### **Significance of the Study**

A study of the relationship between identification with Mercy charism and staff professional development is important for several reasons. All schools have to make decisions about how to allocate their finite resources. Funds and time for professional development need to be used wisely. This study provides insight into what is working in a group of schools and could be considered by other schools when making decisions about how to use time and funds for staff professional development. Other schools, Catholic or public, may also find the results illustrative as they may want to strengthen aspects of their staff development.

Other order-sponsored Catholic schools may find the results helpful as they seek to strengthen or emphasize the charism of their sponsoring community. Catholic schools, including order-sponsored schools, are dealing with the reality of fewer priests, sisters, and brothers as staff members in their schools. This shift to lay leadership and lay staff members in Catholic schools means that those schools need to think about spiritual and religious formation for people working in those schools.

Finally, this study is significant for Mercy schools. As the governance model of these schools moves towards one that is more centralized and less community-based, insights from this study may be helpful in finding ways for these schools to maintain or strengthen their sense of Mercy identity. Task forces preparing for movement into the Mercy Education System may find the results useful for their work on issues of charism and leadership.

### **Additional Definitions and Terms**

*Laypersons* are those who are not in religious life (not priests, brothers, sisters).

*Mercy Associates* are laypersons who make a promise for a number of years to participate in the ministries of the Sisters of Mercy, but do not profess religious vows.

## **Chapter 2**

### **Review of the Literature**

This study examines how transmission of Mercy charism in Mercy secondary schools in the United States is facilitated by staff development. Sub-questions in the study include examination of how staff members in these schools understand Mercy charism and how stakeholders in these schools convey Mercy charism to staff. This chapter is a review of literature and ideas related to organizational culture, climate, and identity, charism, and effective professional development and the relation of those concepts to Catholicism and Catholic schools. First, the chapter outlines the transition to lay leadership in Catholic schools in the United States. Next, the chapter describes historical and current research on organizational culture, organizational climate, and organizational identity. The chapter then includes information from the field of education on professional development for teachers and other staff members including induction and orientation programming. Then, this chapter connects these concepts to Catholicism and Catholic schools by elaborating on the concept of charism including Mercy charism in particular. Finally, this chapter reviews literature related to the presence of charism in other Catholic religious order-sponsored institutions and schools.

#### **Lay Leadership in Catholic Schools**

Today, most leaders of Catholic secondary schools are laypersons, as opposed to religious brothers, sisters or priests (Caruso, 2012; McDonald & Schultz, 2012). One reason for this shift is numbers: just as the amount of Catholic schools and students in those schools peaked in the United States in the 1960s, so did the amount of vowed religious in the United States

(Center for Applied Research in the Apostolate [CARA], 2015, “Frequently Requested Church Statistics”). Although the number of vowed religious has decreased, the percentage of people identifying as Catholic has remained constant in the United States since World War II (Gray, 2010), and Catholic schools still remain. As priests, brothers, or sisters have transitioned from leadership of Catholic schools, lay leaders have taken their places. The model of a president and principal in Catholic secondary school leadership has emerged as a prevalent choice of organizational structure (James, 2009). Generally a president oversees school efforts related to finances, marketing, and strategic planning (Dygert, 2000), although the model can be too market-driven (Heft, 2011) and subject to issues with division of tasks or disconnect from what is happening in the school (James, 2009). Administrators are also supported by boards of trustees that often include majority lay members (Haney, 2010; Heft, 2011). These lay administrators and board members may have experience with Catholic education as a student, parent, or staff member, but often do not have the same religious training or formation as members of religious orders (Belmonte & Cranston, 2009), even though these leaders are often viewed as *de facto* pastors of school communities because of their roles in leading or participating in the spiritual life of the school (O’Keefe, 2000), and the reality that their actions can influence the participation of teachers in religious activities (Coll, 2009). In two New York dioceses, younger lay leaders at Catholic schools saw themselves as faith leaders for their schools, even if they did not have extensive religious formation (Beale, 2013). Lay presidents were able to successfully transmit charism of Holy Cross schools (Rentner, 2010), and were motivated by their personal faith. In other Holy Cross schools, however, managerial attributes of leaders were seen as more important than spiritual attributes (Marinelli, 2002). Strong school leadership is effective in contributing to new teacher understanding of charism (Antonelli, 2008;

Hardiman, 2005; McNicholas, 1990). Attempts to assert the heritage of the founding order in order-sponsored schools do not always result in understanding of the charism for community members (Hickey, 2006; Kane, 2011).

### **Organizational Culture, Climate, and Identity**

Organizational culture can be defined in various ways. Culture was initially defined in scholarship as a set of norms and practices to govern employee behavior (Schein, 1985). Later definitions emphasized the symbolic nature of culture (Rafaeli & Worline, 2000) or the ability of individuals within an organization to use elements of culture as a toolkit (Swidler, 1986). Erhart, Schneider, and Macey (2011) suggested common attributes of organizational culture despite the various approaches to describing culture, based on the works of Alvesson (2002), Martin (2002), Schein (2010) and Trice and Beyer (1993). They argued organizational culture is shared, stable, has depth, is symbolic, expressive, and subjective, is grounded in history and tradition, is transmitted to new members, provides an organization with order and rules, has breadth, is a source of collective identity and commitment, and is unique (Erhart, Schneider, & Macey, 2011, p. 131).

The traditional way to think about culture is as a set of values and practices (Deal & Kennedy, 1982; Peters & Waterman, 1982; Schein, 1985; Smircich, 1983). This view holds that culture is something that an organization has, and elements such as values and practices can be measured (Alvesson, 2002; Smircich, 1983). These “shared basic assumptions” are “taught to new members as the correct way to perceive, think, and feel” in organizational situations (Schein, 2004, p. 17). New members to the organization are shown that culture is “the way we do things around here” (Deal & Kennedy, 1982). Schein (2010) described three levels of culture: artifacts, espoused values and beliefs, and underlying beliefs and assumptions, and

argued that understanding basic underlying assumptions was key to understanding the other levels. Those assumptions then give meaning to the stated values and artifacts of the organization. These beliefs and assumptions can be derived from an organization's founders (Dickson, Nieminen, & Biermeier-Hanson, 2012; Flamholtz & Randle, 2014; Schein, 2010). They can also be influenced by national culture (Klein & Koslowski, 2000; Kwantes & Dickson, 2011) although scholars disagree about the direction of influence (Erhart, Schneider, & Macey, 2011; Hofstede & Peterson, 2000; Ouchi, 1981). Culture also helps to create boundaries or definitions – what does this organization do, and how does this organization interact with others (Louis, 1983). Organizational success can be attributed to organizational culture (Ouchi, 1981).

Scholars shifted in the late 1980s and 1990s to describing examinations of culture in terms of stories and symbols. This view describes culture as more of a metaphor – something that an organization is, rather than elements an organization has (Alvesson, 2002; Smircich, 1983). Culture seen as symbol or story “forms superglue that bonds an organization, unites people, and helps an enterprise accomplish desired ends” (Bolman & Deal, 2008, p. 253). Symbols are a layer of culture (Gagliardi, 1990; Rafaeli & Worline, 2000; Schein, 1990). They can be used to reflect culture, or to help provide meaning for individuals' experiences within an organization. Symbols can also serve as a touchpoint for discussions within the organization about organizational identity (Rafaeli & Worline, 2000) although meanings inferred by organizational members are not necessarily the same, and meanings interpreted by outsiders may be different from those in the organization as well (Schein, 1990). Rites and rituals can be part of the symbolic life of an organization (Bolman & Deal, 2008) and are ways to study an organization (Trice & Beyer, 1984). Stories are ways to build culture, maintain a sense of culture, and mediate conflict (Boyce, 1996; Denning, 2005; Feldman, 1990; Wilkins, 1983).

Studying the stories repeated in an organization can be a way to start analysis of organizational life (Dailey & Browning, 2014).

Culture has also been described as a toolkit. Rather than a system of assumptions, values, and practices, culture is a “‘tool kit’ of symbols, stories, rituals, and world-views, which people may use in varying configurations to solve different kinds of problems” (Swidler, 1986, p. 273). Rather than culture shaping consistent ends of action, “actors select differing pieces for constructing lines of actions” (Swidler, 1986, p. 277). This view of culture suggests that it is not the end results of actions that are consistent for individuals within a culture, but the way in which those individuals go about achieving particular ends. Culture rationalizes behavior rather than motivates it (Campbell, 2006). This view of culture has been critiqued in that it “rules out the possibility that understandings or beliefs could be motives for actions” (Vaisey, 2009, p. 1678). The view also cannot fully explain why some individuals are able to use a cultural tool kit in particular situations and others cannot (Kellogg, 2011).

Recent movements in the literature suggest that more synthesized views of culture are emerging. Rather than being motivated by internal values or using particular strategies, culture is comprised of both. Vaisey (2009) described a “dual-process model of cultural cognition: actors are driven primarily by deeply internalized schematic processes..., yet they are also capable of deliberation and justification...when required by the demands of social interaction” (p. 1687). There is also recognition that an organization, and individuals within an organization, do not act in a vacuum. A current area of interest is how cultural materials go back and forth between a group and the environment in which they are situated (Weber & Dacin, 2011).

Organizational climate and organizational culture are different but overlapping interpretations of the same phenomenon (Denison, 1996; Payne, 2000; Schein, 2000; Schneider,

Erhart, & Macey, 2011). Lewin, Lippitt, and White (1939) introduced the term organizational climate to describe interactions of groups of boys. Argyris (1958) defined climate as the formal organization, the organization's interactions with outsiders, and the informal culture in the organization. Climates develop through the shared work of those brought into the organization (Argyris, 1958). Other researchers in the 1960s focused on climate as a way to describe relationships between managers and employees (Likert, 1961; McGregor, 1960). Further research in the 1960s disagreed about the focus on the individual in organizational climate research, with some researchers focusing on the whole experience of employees, while others focused on measuring individuals' experiences within an organization (Tagiuri, Litwin, & Barnes, 1968). Further research on organizational climate has focused on the generic (molar) nature of an organization's climate (Ostroff, 1993) or on a specific focused strategic or process climate (Schneider, 1975). Focused climates include safety climates (Zohar, 2014), ethical climate (Mayer, 2014), and climates focused on servant leadership (Erhart, 2004; Walumba, Hartnell & Oke, 2010). Schneider, Erhart, and Macey (2011) noted that climate comes from employee perceptions of rules or experiences of rewarded behaviors. Affinity with the organizational climate leads to individuals seeking to be part of an organization or seeking to leave it (Schneider, 1987). Feldman and O'Neill (2014) argued that an organization's culture and climate impact the length, intensity, formality, and specificity of employee socialization, orientation, and training programs. "In organizations in which climates are strong and there is high consensus around core cultural beliefs, it is expected that SOT programs will be longer, more intense, more formal, and more focused on organization-specific practices" (Feldman & O'Neill, 2014, p. 48). They also noted that organizations with strong climates are likely to deliver these programs in a face-to-face setting (Feldman & O'Neill, 2014), although Turkle

(2011) argued that more study is needed regarding electronic delivery of orientation or training content.

An organization's identity can be described as that which is central, enduring, and distinctive (Albert & Whetten, 1985). Central elements capture the essence of the organization. Enduring elements exhibit a degree of continuity over time. Distinctive elements distinguish that organization from others. Whetten (2006) noted that

CED [central, enduring, distinctive] attributes function as organizational identity referents for members when they are acting or speaking on behalf of their organization, and they are most likely to be involved in organizational discourse when member agents are grappling with profound, fork-in-the-road, choices. (p. 220-221)

Organizational culture and organizational identity explore the same elements of organization, but culture research seeks to understand how members interpret those elements, and identity research seeks to understand how an organization expresses those to outsiders (Hatch & Schultz, 1997; Whetten, 2006). Identity helps one understand the relationship between one's self, work, and organization (Alvesson, Ashcraft, & Thomas, 2008). Organizational identity can be viewed on multiple levels, and culture can affect identity, and vice versa, (Hatch & Schultz, 2002; Weber & Dacin, 2011). Individual identity fosters a sense of small group identity that fosters a sense of large group identity (Ashforth, Rogers, & Corley, 2008), suggesting that a large group identity is strengthened or weakened by the identity of individuals within the system. This sense of identity can help to generate organizational culture (Gioia, Patvardhan, Hamilton, & Corley, 2013). Conversely, the "farther removed an organization is from employees, physically or psychologically, the more abstract it becomes" (Hultman & Hultman, 2015, p. 47). Times of change often include a renewed or heightened focus on organizational identity as a group seeks

to reinforce its identity or reshape its culture. Wittberg (2013) noted that the relationship between faith-based non-profit organizations and their sponsoring communities was affected by geographic spread. Although many of these groups provide education and training to help strengthen religious identity it is not implemented universally, and the “danger of losing both FBO’s religious identity and its connection with its founding faith community is greater, the larger and more bureaucratic its umbrella organization becomes” (Wittberg, 2013, p. 559).

### **Development of Organizational Culture**

Views about how an organization’s culture is shaped and how values are instilled depends in part on how one views culture. Scholars disagree about the ability of an organization’s leaders to change culture. Some argue that cultural change comes from lower-level members of an organization rather than the leader (Alvesson & Berg, 1992; Meek, 1998) while others posit that leaders can have an influence (Cameron & Quinn, 2011; Tichy, 1982). Schein (2010) argued a middle viewpoint, suggesting that promoting “hybrids” (leaders who were formally lower-level members of an organization) can lead to cultural change because these leaders have an understanding of views and opinions of those in lower levels of the organization, but now have power to reorganize or make changes. Viewing culture in a symbolic frame means that special emphasis is placed on stories, rites, or rituals (Bolman & Deal, 2008; Denning, 2005). Latham and Sue-Chan (2014) argued that various motivational tactics such as celebrations could have an effect on organizational culture. Ganegoda, Latham, and Folger (2015) suggested that subconscious priming with messages or words from a mission statement had an effect on organizational culture. Organizations that use democratic or collective decision-making processes can create greater opportunities for growth and change, but also situations of greater conflict when individuals within the organization hold differing views (Chen, Lune, & Queen,

2013, p. 270). Maintaining an institutional identity relies on all members of the group, but in healthcare settings a mission leader is “an indispensable member of a Catholic health care organization’s leadership team” (Yanofchick, 2009, “Mission Leaders: A Key Ingredient in the Leadership Mix,” para. 3).

### **Effective Professional Development**

Professional development in schools is the mechanism through which people are engaged in change processes. Teachers (or other staff members in a school) experience the development, and the programming increases their knowledge or skills (National Staff Development Council [NSDC], 2011). Teachers then use that new knowledge to improve lesson content or pedagogical approaches, resulting in more learning for students (Desimone, 2011). Effective professional development is seen as a “comprehensive, sustained and intensive approach to improving teachers’ and principals’ effectiveness in raising student achievement” (NSDC, 2011, “Definition of Professional Development,” para. 3). The NSDC (2011) issued recommendations for professional development: it should be part of a school culture where teachers are regularly meeting in learning communities, and the professional development is valued by leaders. Resources should be used wisely, and the professional development should utilize data from multiple sources and integrate theories as framework.

These recommendations reflect findings in the literature regarding several aspects of professional development that matter: the duration, the context, the process, and the follow-up. The traditional model of professional development, a one-day workshop-style model, is ineffective in changing teacher practice (Darling-Hammond, Wei, Andree, Richardson, & Orphanos, 2009) and is not linked to student achievement (Garet, Porter, Desimone, Birman, & Yoon, 2001; Yoon, Duncan, Lee, Scarloss, & Shapley, 2007). The duration of professional

development matters (Darling-Hammond et al., 2013). The context in which professional development occurs also matters. Professional development that happens out of the context of the school community is less effective (Harwell, 2003; Van Driel & Berry, 2012; Wasley & Lear, 2001; Zepeda, 2013). Professional development that is content-area specific is also more effective than efforts that are more generic (Blank, de las Alas, & Smith, 2008; Darling-Hammond et al., 2009). Teacher learning in job-embedded professional development is “professional development situated *in* schools that is always *about* the current work of schools” (Croft, Coggshall, Dolan, Powers, & Killian, 2010, p. 5). Professional development that is more learner-centered is more effective than designs that do not allow teachers to practice skills (Darling-Hammond et al., 2009; Ermeling, 2010; French, 1997; Garet et al., 2001; Joyce & Showers, 2002). After initial professional development, teachers need continued support for successful implementation of learned skills, which could occur through coaching or mentoring (Cornett & Knight, 2009; French, 1997; Harwell, 2003; Truesdale, 2003; Yoon et al., 2007), observations or lesson study (Akiba & Wilkinson, 2016; Gutierrez, 2016; Lieberman, 2009); professional learning communities (PLCs) (Borko, 2004; Dufour & Marzano, 2011; Gersten, Domino, Jayanthi, James, & Santoro, 2011; Vescio, Ross, & Adams, 2008). PLCs have more structure than informal knowledge communities to which teachers may belong in order to make sense of their experiences (Craig, 2009). Work done through PLCs can lead to gains in student achievement in areas such as literacy (Cunningham, Etten, Platas, Wheeler, & Campbell, 2015; Gersten et al., 2010) or mathematics (Huggins, Scheurich, & Morgan, 2011; Jacobs, 2010). These groups can lead to personal and professional fulfillment for educators (Leaman, 2005), although putting the structure into place and placing people into communities does not automatically equal growth (Stanley, 2011). Effective leadership in a collaborative atmosphere

with shared beliefs is linked to successful PLCs (Buttram & Farley-Ripple, 2016; Carpenter, 2015; Shorter, 2012).

The term “professional learning” is being used in the field to distinguish support for teachers that is ongoing, systematic, and designed to improve student achievement (Learning Forward, 2011, “Professional Learning Definition”) rather than a one-day off-site workshop format. The Obama administration’s *A Blueprint for Reform* regarding the reauthorization of No Child Left Behind called for school districts to “support educators in improving their instructional practice through effective, ongoing, job-embedded, professional development that is targeted to student and school needs” (U.S. Department of Education, 2010, p. 15). Thirty-eight states have adopted seven standards for professional learning advanced by the organization Learning Forward (Learning Forward, 2016, “Our Impact”). According to these standards, very similar to the NSDC recommendations, professional learning should occur within learning communities, have skillful leaders and support systems, utilize resources effectively, be data-driven, incorporate best practices for learning, sustain implementation of efforts, and have outcomes aligned with standards (MDE, 2012). The Department of Education from one of the adopting states, Michigan, described the standards as focusing on increasing “educator effectiveness and results for all students” (MDE, 2012, p. 2).

Most of the literature focuses on professional development that teaches skills, and tracks implementation of those skills in specific content areas, then links them to student achievement (Darling-Hammond et al., 2009). It is unclear how those results would translate to professional development that is less skill-centered and seeking to improve the student learning experience in ways other than improvement in quantifiable test scores. The literature also suggests that external factors such as school culture and leadership also contribute to the success of

professional development. Schools culture can affect teachers' attitudes towards professional development and personal professional development plans (Sullivan, 2010). Regular unstructured interactions between teachers within a school influence attitudes and behaviors (Penuel et al, 2010). Teachers in schools with more collaborative cultures are more likely to transfer skills learned in professional development than teachers in schools with less collaborative cultures (Drago-Severson, 2012; Jurasite-Harbison & Rex, 2010). Teachers in schools with supportive leaders are more likely to successfully incorporate concepts from professional development into their teaching (Melville & Wallace, 2007).

### **Effective Induction Programming**

Induction is a specific type of professional development aimed at introducing novice teachers to the school environment. All states except for Arizona and Wyoming have some state policy provisions for induction and mentoring of new teachers (Sindelar, Heretick, Hirsch, Rorrer, & Dawson, 2010). However, only 27 states require all new teachers to participate in such programs, and often those requirements do not include multi-year programs, participation as a prerequisite for advanced licensure, or funding for such programs (Goldrick, Osta, Barlin, & Burn, 2012).

Mentoring is an important component of effective induction programs (Arnold-Rogers, Arnett, & Harris, 2008; Bliss, 2013; Curran & Goldrick, 2002; Ingersoll & Strong, 2011; McBride, 2013). Effective mentoring programs include assignment of a mentor from the same area of certification (Bliss, 2013). The presence of mentoring in an induction program is linked to higher retention rates for new teachers (Ingersoll & Kralik, 2004; McBride, 2013), but other studies show either no connection (Weschler et al., 2010) or mixed findings (Glazerman et al., 2010). In a review of studies of mentoring programs published between 2005 and 2010,

Waterman and He (2011) noted that a number of factors such as the complexity of the issue, a need for context, a focus on quality of mentorship, and a presence of other factors contributing to retention other than mentoring suggest that studying the relationship between mentoring and retention should focus on mentoring as a process for new teachers rather than a program.

Viewing mentoring as a holistic process recognizes that an assigned mentor plays a role in the process, but so do friends, family, and other colleagues (Waterman & He, 2011). A climate of collaboration promotes improved mentoring within schools (Pogodzinski, 2015) and is positively related to job satisfaction (Strayhorn, 2009). This more holistic viewpoint is also reflected in literature suggesting that more work needs to be done regarding preparation and support for mentors (Bullough, 2012; Desimone et al., 2014; Gordon & Brobeck, 2010; Hobson et al., 2009).

### **Professional Development and Values**

Much of the literature defines the effectiveness of professional development in terms of skills that can be seen in teachers or quantifiable achievement gains in student achievement as defined by tests. However, some researchers argue that other qualities such as character and personality are necessary for teachers and need to be developed (Carr, 2007). The act and practice of teaching also has a moral dimension (Carr, 2011; Sanger and Osguthorpe, 2013), although teachers do not routinely talk about this aspect of their practice (Campbell, 2008; Klassen, 2002; Sockett & LePage, 2002). Values education in schools is often reactive and unplanned or embedded in everyday school life without deliberate thought (Thornberg, 2008). Teachers' unconscious beliefs can filter out messages from professional development programs if those messages conflict with their own beliefs (Patterson et al., 2012). An explicit focus on professional values should be incorporated into teacher preparation programs (Mead, 2003). Other fields, such as nursing, discuss the use of professional development to instill values for

those training for the profession (Corrigan & Kwasky, 2014; Meehan, 2012). For teachers currently in the profession, support for their own emotional and moral growth is essential to helping those teachers foster that growth in students (Weissbourd, 2003). Ongoing professional development, including supports such as a learning community, can contribute to teachers' greater belief in a practice of inclusivity (Schlessinger, 2014). An ongoing program surrounding cultural competency conducted at the college level resulted in increased self-reflection and cultural responsiveness according to Devereaux, Prater, Jackson, Heath, and Carter (2010). It is unclear how such a program would work at the secondary level. Restorative justice is a theory suggesting that crime harms relationships, and justice involves repairing those relationships. Vaandering (2014) conducted a study on incorporating the values of restorative justice through an ongoing professional development program, and found that the program was able to influence educators' beliefs, values, and practice related to restorative justice. Researchers in the Netherlands found that an ongoing program incorporating review of lessons and lesson design created greater awareness of civics values and incorporation of civics education into lessons (Willemse, ten Dam, Geijselvan, Wessum, & Volman, 2015).

### **Catholic Organizational Culture: Shaped by the Church, Tied to Charism**

In Catholic schools, part of their identity as Catholic schools is that – Catholic. Although the Church has been part of schools and education for centuries, modern documents highlight current thinking about the role of church in education and Catholic schools in general. Bishops at Vatican II stated that a universal right to education exists, and parents are primary teachers of their children. The purpose of education is “formation of the human person in the pursuit of his ultimate end and of the good of the societies of which, as man, he belongs, and in whose obligations, as an adult, he will share” (Paul VI, 1965a, para. 1). Christian education,

according to the bishops, has a further goal: fostering an awareness of faith given through baptism, and developing the person to be able to shape the world through that faith. The proper function of a Catholic school is

to create for the community a special atmosphere animated by the Gospel spirit of freedom and charity, to help youth grown according to the new creatures they were made through baptism as they develop their own personalities, and finally to order the whole of human culture to the news of salvation so that the knowledge students gradually acquire of the world, life and man is illuminated by faith. So indeed the Catholic school, while it is open, as it must be, to the situation of the contemporary world, leads its students to promote efficaciously the good of the earthly city and also prepares them for service in the spread of the Kingdom of God, so that by leading an exemplary apostolic life they become, as it were, a saving leaven in the human community. (Paul VI, 1965a, para. 8)

The Sacred Congregation for Catholic Education [CCE] focused in particular on Catholic schools in several documents following Vatican II: *The Catholic School* (1977), *Lay Catholics in Schools* (1982), The 1983 Code of Canon Law's section on schools, *The Religious Dimension of Education in a Catholic School* (1988), *The Catholic School on the Threshold of the Third Millennium* (1997). Some general themes emerge from this collection of documents. The first is that a Catholic school has a fundamental purpose that is above and beyond that of other types of schools. The general purpose of any school, according to the CCE, is examination of culture, and growth, or formation, of the whole person (CCE, 1977, para. 26; CCE, 1997). Catholic schools include that examination of culture, but seek to synthesize that culture with faith, and faith with life (CCE, 1977, para. 49). Efforts to move toward that synthesis include a religious dimension (CCE, 1988). This "ecclesial dimension is not a mere adjunct, but is a proper and

specific attribute... a fundamental part of its very identity and the focus of its mission” (CCE, 1997, para. 11). Rather than thinking about schools as institutions, the CCE used the language of community to describe both schools and the realities in which they exist. Christian education promotes respect for government, observation of just laws (the adjective being an important distinction) and awareness of a larger international society (CCE, 1988, para. 45). A school community seeks to help students grow in knowledge, but then this community then uses knowledge to serve others (CCE, 1977, para. 46). The second theme to emerge from these writings is related to laypersons working in Catholic schools. Lay persons in Catholic schools are vital parts of that community, and the “distinctive Catholic identity and mission of the Catholic school also depend on the efforts and example of the whole faculty” (USCCB, 2005, p. 233). Their actions can give witness to the model of the human person presented to students (CCE, 1982, para. 32). These educators “fulfil [sic] a specific Christian vocation and share an equally specific participation in the mission of the Church” (CCE, 1997, para. 19). Although all Catholic schools have the same general purpose and basic characteristics (education rooted in the Gospel, for example), the expression of that is based on the charism of the founding religious institute. Lay Catholics “should try to understand the special characteristics of the school they are working in, and the reasons that have inspired them. They should try to so identify themselves with these characteristics that their own work will help them toward realizing the specific nature of the school” (CCE, 1982, para. 39). Lay teachers in Catholic schools require adequate formation (both professionally and religiously), adequate salaries, and authentic participation in responsibility for the school (CCE, 1982, para. 78). The current Code of Canon Law in the Church gives a local bishop supervisory control of schools within his diocese, and also noted that “instruction and education in a Catholic school must be grounded in the principles

of Catholic doctrine teachers are to be outstanding in correct doctrine and integrity of life” (Code of Canon Law, 1983, Can. 803 § 2). Recent writings from the CCE have cited increasingly secular and multicultural societies, and noted that

one of the most important challenges will be to foster a greater cultural openness amongst teachers and, at the same time, an equally greater willingness to act as witnesses, so that they are aware and careful about their school’s particular context in their work, without being lukewarm or extremist, teaching what they know and testifying to what they believe in. (CCE, 2014, Specific Challenges, para. 2)

In Catholic life, the term vocation refers to a call, or a way of life. Catholics use this term to refer to a person’s call by God to a specific way of life, such as marriage or religious life (Cooper, Sweeney, & Dailey, 2013). Catholics also recognize that all lay persons (people who are not clergy or members of a religious order) also have a vocation. As baptized Christians, they participate in the mission of the Church, working for the “sanctification of the world from within” (CCE, 1982). Work in a Catholic school, specifically teaching, is more than a profession or career, but a vocation. “The work of a lay educator has an undeniably professional aspect; but it cannot be reduced to professionalism alone. Professionalism is marked by, and raised to, a super-natural Christian vocation” (CCE, 1982). Teachers and staff members “fulfill a specific Christian vocation and share an equally specific participation in the mission of the Church, to the extent that ‘it depends chiefly on them whether the Catholic school achieves its purpose’” (CCE, 1997). In short, the Catholic identity of a school depends upon the staff members of that school. Language from the United States bishops, those who according to canon law, have authority over American Catholic schools, have stated that “while some situations might entail compelling reasons for members of another faith tradition to teach in a Catholic school, as much as possible,

all teachers in a Catholic school should be practicing Catholics” (USCCB, 2005, p. 233). The responsibility for a particular position (for example, knowledge of mathematics or counseling certification) in this view is secondary to responsibility for shaping the faith lives of students, as “all members of the faculty, at least by their example, are an integral part of the process of religious education...teachers’ life style and character are as important as their professional credentials” (USCCB, 2005, p. 233). The practical living out of these ideas in modern American society presents several challenges. How does one determine the Catholicity of an applicant? Under federal law it is “illegal for an employer to discriminate against a job applicant because of his or her race, color, religion, sex (including gender identity, sexual orientation, and pregnancy) national origin, age (40 or older), disability or genetic information” (U.S. Equal Employment Opportunity Commission, n.d., “Prohibited Employment Policies/Practices). Legally qualifying teachers as “ministers” in a religious organization would allow a greater degree of selection in hiring, but is this discriminatory in an overbearing way? Is a commitment to Catholic teachings such as human dignity and justice more important than being divorced without a marriage being annulled? Is a Catholic who has been baptized but does not attend church a better applicant than one who belongs to another Christian denomination and is an active churchgoer? Other Catholic writings about work and workers call for the rights and dignity of all workers to be respected (Leo XIII, 1891; John XXIII, 1961, John Paul II, 1981; John Paul II, 1987; John Paul II, 1991; Paul VI, 1971; Pius XI, 1931).

### **Charism: Catholic Identity and Culture**

Catholic schools can be viewed through the lenses of organizational culture, organizational climate, and organizational identity. Catholic schools are shaped first and

foremost by their identity as Catholic institutions. The term charism captures the way in which Catholic organizations understand and describe their sense of organizational culture and identity:

Whether extraordinary or simple and humble, charisms are graces of the Holy Spirit which directly or indirectly benefit the Church, ordered as they are to her building up, to the good of men, and to the needs of the world (CCC, 1994, para. 799).

Charism can be understood and described in the various ways in which researchers refer to culture. Groups may express their charism by stating particular sets of values that can be driving forces behind sponsored ministries (Confoy, 2013) or by naming a set of particular vocabularies which possibly distinguish that group from others within the church (Cook & Simonds, 2011). Schools can use charism as a toolkit to use in interactions with others and the wider world (Cook & Simonds, 2011).

Sessions of Vatican II invited members of religious institutes to reexamine the philosophy and vision of their founder in a renewal of religious life within the church. This caused religious groups to make changes to ways of life such as manners of dress and decision-making processes. Groups also closely examined the original purpose of their institute's founding. The Sisters of Mercy made changes to these aspects of their communal life after Vatican II. They no longer wore long black habits and veils, but wore modest ordinary clothes. Decision-making became more communal. They strengthened their efforts to address unjust social structures causing poverty in the world (Bonnarens & Rocklage, 2014)

### **Mercy Charism**

The expression of a religious order's charism is affected by the people attempting to live that reality out in the context of a particular place and time. The Mercy charism starts with the insight and person of Catherine McAuley. She was a thoughtful woman with a witty sense of

humor who enjoyed dancing and music. Catherine was compassionate towards others and showed great hospitality towards them. Childless herself, she adopted the children of relatives. Protestant relatives and others in the wider community of early 19<sup>th</sup> century Dublin dissuaded Catherine from practicing Catholicism, but she remained devoted to God and her faith. Catherine lived in a time and place with a wide gap between those who were rich and those who were poor. She cared deeply about needy people in her world, particularly young women who lacked access to education (Sullivan, 2006, 2012). Catherine and those who joined her in the first House of Mercy and those who became Sisters of Mercy sought to aid the poor and care for those who were sick, but also to address causes of poverty. Education, to Catherine, would “liberate them from poverty and dependence” (Hoey, 1991, as cited in MSEA, 2001). Catherine brought her sense of compassion, hospitality, and devotion to God to her work from the opening of the first House of Mercy as a laywoman to the founding of the Sisters of Mercy in 1831. She saw God as merciful, and sought to extend similar mercy to others (Regan & Keiss, 1988; Sullivan, 2012). McAuley made these qualities the underpinning of life in the religious sisters of Mercy. When asked to describe necessary qualifications for joining the order, McAuley replied, “an ardent desire to be united to God and a desire to serve the poor” (McAuley, C., 1778-1841, McAuley to G. Doyle, September 5, 1836). This new religious order was different from many others of the day. The Sisters of Mercy, or “walking nuns”, were out in the community rather than spending their days cloistered in prayer (Sullivan, 2012, p. 314). Prayer was important, but so was serving those in need.

Current work of the Sisters of Mercy continues to focus on a commitment to working for justice, a preferential option for the poor, and a prioritizing of education for young women. The Constitutions of the Sisters of Mercy (1992) express this sense of identity: “We carry out our

mission of mercy guided by prayerful consideration of the needs of our time, Catherine McAuley's preferential love for the poor and her special concern for women, the pastoral priorities of the universal and local church and our talents, resources, and limitations" (#7). Mercy is a primary motivation for action; the "principal path pointed out by Jesus Christ to those who are desirous of following Him" (McAuley, 1841, Ch. 3 para. 1). Sponsored ministries are a way to act in mercy. "As Sisters of Mercy, we sponsor institutions to address our enduring concerns and to witness to Christ's mission. Within these institutions, we together with co-workers and those we serve, endeavor to model mercy and justice and to promote systemic change according to those ideals" (Sisters of Mercy of the Americas, 1992, #5). The most recent chapter of the Institute identified four additional "critical concerns" (non-violence, racism, care of the environment, immigration) in addition to the concern for poor women and children that require attention and motivate actions of the sisters and their sponsored ministries. Attendees at the 1990 MSEA conference affirmed core values for Mercy secondary schools: collaboration, compassion, educational excellence, concern for women and women's issues, global vision and responsibility, and spiritual development. These values were used to shape content of MSEA conferences. Additional core values as expressed in individual school mission statements include terms such as "faith community, gospel values, Christian, Catholic, special concern for the poor, especially women and children, hospitality, appreciation for diversity, justice, dignity of self and others, respect of self and others, integrity, earth, leadership" (Network, 2015b). The founding chapter of the Institute of the Sisters of Mercy of the Americas included a direction statement to shape action of the Institute's ministries:

Animated by the Gospel and Catherine McAuley's passion for the poor, we, the Sisters of Mercy of the Americas, are impelled to commit our lives and resources to act in solidarity

with the economically poor of the world, especially women and children; women seeking fullness of life and equality and church and society; one another as we embrace our multicultural and international reality. This commitment will impel us to develop and act from a multicultural and international perspective; speak with a corporate voice; work for systemic change; practice non-violence; act in harmony and interdependence with all creation; and call ourselves to continual conversion in our lifestyle and ministries (2005).

Ministries sponsored by the Institute are varied. Sisters manage and work in health care systems. They coordinate and provide transitional and low-income housing for women and children. They advocate at the United Nations for social justice issues such as human trafficking. They sponsor elementary, secondary, and post-secondary schools and tutoring programs.

Organizations within the Catholic Church such as religious institutes may display an identity, or central enduring distinctive characteristics, different from other groups within the Church, even though all of those groups would refer to themselves as Catholic. For example, some Mercy schools are located in dioceses in which bishops have been active in defining Catholic identity in a particular way in employee contracts, including those of school employees. Writings from the Sisters of Mercy highlight the delicate balance of maintaining good relationships with Church hierarchy while asserting a different view of what it means to be Catholic. The Sisters of Mercy West Midwest Community Leadership Team noted that they “recognize and respect the teaching and pastoral roles of the local ordinary [bishop] in the exercise of his office” but as

canonical sponsors of secondary education institutions we assume responsibilities as well. The Constitutions of the Sisters of Mercy of the Americas, which state the particular laws of our congregation, provide inspiration and direction that will also

enhance the ministry of our sponsored works.” (personal communication, October 7, 2015)

The Sisters of Mercy West Midwest Community Leadership Team stated they “honor, promote, and positively contribute to the Catholic and Mercy character of our schools by employing highly qualified, principled educators irrespective of race, religion, ethnicity, gender, sexual orientation or physical ability” (personal communication, October 7, 2015).

### **Lessons from Catholic Healthcare Systems**

Education and healthcare are two of the largest categories of sponsored ministries for religious institutions (McGuiness, 2013). Discussions related to organization mission, identity, and charism in the field of Catholic health care organizations can possibly be illustrative for Catholic secondary schools. The basic mission of both schools and hospitals is caring for people in need. These systems also provide services to non-Catholic patients just as schools educate students who are not Catholic (Meyer, 2007). Both systems saw rapid expansion of services in the mid-20<sup>th</sup> century, but are currently dealing with the reality of merger and contraction (Rau, 2012; McDonald & Schultz, 2014). Catholic-sponsored healthcare systems have also experienced a shift from leadership by members of sponsoring religious institutes to lay leadership within the past 50 years (Trancik & Barina, 2015). A significant area of difference is in relation to employees of these institutions. Many employees of healthcare systems are not necessarily Catholic, and directives from the USCCB call for non-discriminatory hiring (which follows employment law in the United States) and note that employees of Catholic health care institutions “must respect and uphold the religious mission of the institution...maintain professional standards and promote the institution’s commitment to human dignity and the common good” (USCCB, 2009). Current debate surrounding education is whether or not

employees in schools should be viewed in the same way. The Supreme Court decided in 2012 that the term “minister” applies to anyone in a religious setting that teaches the faith, and that would include teachers in a Catholic school (*Hosanna Tabor v. EEOC*, 2012). While this debate usually involves civil and church disagreement regarding issues of reproduction or sexuality, the discussion of such “ministerial” exceptions or morality clauses as a factor in contracts or hiring assumes Catholic school employees are in a position to teach either directly or by example (Daly, 2014). Physician contracts for Catholic healthcare institutions generally require indication of agreement to abide by the *Ethical and Religious Directives in Catholic Health Care* (Directives) in order to practice medicine, but do not include the same morality clauses which some bishops and dioceses are pushing to insert in teacher contracts in recent years in places such as Cleveland and San Francisco (see O’Donnell, 2015; “Catholic School Teachers,” 2015). Questions of conscience and contracts in healthcare generally address acceptable actions for persons within the context of their performance at work, while discussion of language in teacher contracts includes discussion of behavior both inside and outside the school setting.

### **How Healthcare Systems Address Mission**

Boyle (2015) described how two merging Catholic healthcare systems examined the issue of creating or preserving institutional identity through formation and assessment. Members of both systems agreed upon shared values and topics for employee formation to cover, but “the team was not convinced that either the typical content or the way it is taught were necessarily relevant or effective for perpetuating Catholic identity” (Boyle, 2015, p. 35). The new system’s solution to this problem was to use the agreed-upon foundational values to organize the formation and assessment process, and also to shift the way in which this material was presented. The new formation program was site-specific, and was based on programs for leadership that

tailored the curriculum to participants' needs, beginning with "real-time" strategic issues and discussing those along with "content on innovation, operational excellence, mission and theology" (Boyle, 2015, p. 36). A significant challenge to this approach is that it requires more preparation for the facilitators. Another team from the new system developed an assessment process for members of the system using a set of criteria for effective leadership from the field. Assessments cover topics used by facilitators, the consistency and extent of deployment, how approaches are evaluated and improved, and how approaches are integrated across units (Boyle, 2015). This new strategy has "created more work for presenters, but it has helped adult leaders make the connection between their day-to-day work and Catholic identity" (Boyle, 2015, p. 39).

### **Presence of Religious Staff and Catholic School Experience**

Religious staff members of a school are recognized as living out or manifesting the charism of their order (Breux, 1999). Several research studies have examined the relationship between the expression of charism in an order-sponsored school and various demographic traits of the staff (Egan, 2009; Hardiman, 2005; McDermott, 2006; Rentner, 2010.). Schools with the mere presence of religious men or women on staff scored higher in a survey of charism expression than schools with no religious priests, brothers, or sisters on staff (Donahue, 2012), while participants in another study connected their school's Catholic identity with the presence of priests in the school (Fuller & Johnson, 2013).

### **Catholic Induction: Formation**

In Catholic education in its various aspects (adult education, education in Catholic schools, seminary, etc.) the term formation refers to how an individual is shaped in the context of faith, usually in preparation for assuming a particular role or participating fully in a life of faith. Grace (2010) noted that spiritual formation for teachers or leaders could be strengthened in

teacher preparation programs or through coordination between Catholic universities and dioceses. This can be done in terms of formation for life in a religious order (John Paul II, 1992) adults who are seeking to join the Catholic Church (USCCB, 2015, “RCIA”), or helping families and individuals to deepen their faith (USCCB, 1999). Formation is related to catechesis, which is an “education in the faith of children, young people, and adults which includes especially the teaching of Christian doctrine imparted, generally speaking, in an organic and systemic way, with a view to initiating the hearers into the fullness of Christian life” (John Paul II, 1979, para. 18). Catechesis initiates one into the faith; formation prepares one to live that faith in a particular way. Formation in the Mercy tradition can be seen as an “ongoing process that develops knowledge, skills and behaviors consistent with...Catholic/Christian and Mercy identity, and which fosters growth in, and commitment to, the mission, values and abiding convictions of Mercy” (Burke, 2014, slide 3). Induction programming for teachers in Catholic schools should include elements of formation, aligning new teachers’ personal faith systems into the broader school and Catholic context (Shields, 2008). When teachers in Catholic schools were members of religious orders, this formation element happened through the work and learning necessary to join their order or take religious vows. Lay teachers do not have the same level of religious preparation (Cook & Engel, 2006). Effective formation should build on participants’ strengths rather than focus on perceived deficits, and should honor the “plurality of authentic approaches to Catholicism” (Shields, 2008, p.164).

Just as effective professional development continues beyond orientation or induction, effective formation continues beyond an initial formation experience as well. Continued formation should incorporate both formal and informal experiences for prayer and spiritual reflection (Rogus & Wildenhaus, 2000). Mayotte (2013) surveyed Catholic elementary and

secondary school staff members, and noted that respondents believed that faculty prayer strengthened school identity, furthered a school's mission, and gave witness to the wider community regarding beliefs and values. She suggested prioritizing time for faculty prayer, including a retreat experience. Formation could continue through personal spiritual direction (Earl, 2005), days of recollection or journaling (Shields, 2008), and service experiences (Horan, 2005). Fuller and Johnson (2013) suggested Catholic identity could be strengthened through prioritization of campus ministry. This approach, however, could lead to the assumption that Catholic identity stems solely from work done through that department rather than underlying all work in the school.

### **What Exists in Catholic Secondary Schools: Networks and Programming**

Given the transition to lay leadership, many Catholic schools have made attempts to provide formation for new staff members and students. These efforts are intended to help lay staff members recognize the special characteristics of these particular schools. Network-wide programs to continue formation after initial entry into the school community exist in several order-sponsored school organizations. The Jesuit Secondary Education Association (JSEA) "initiates programs and provides services that enable its member schools to sustain their Ignatian vision and Jesuit mission of educational excellence" (JSEA, 2015). The JSEA sponsors same-job conferences on a three-year cycle, and other conferences for educators to discuss "a pertinent current issue in Jesuit secondary education" (JSEA, 2015, "Colloquium in Ignatian Education"). Stated goals of the organization include working with "member schools on integrating Ignatian spirituality and pedagogy into the education process" (JSEA, 2015, "Mission and Goals"). The Xaverian Brothers Sponsored Schools (XBSS) has a Sponsorship Office which "exercises a strategic perspective by providing collaborative, flexible, and futuristic planning which

preserves, protects, and enhances the Xaverian educational tradition while addressing the evolving needs of the sponsored schools” (XBSS, 2015, “Who We Are”). The group facilitates orientation programs, administrator meetings, and a student leadership retreat. The Holy Cross Institute provides resources and programs for schools sponsored by the Congregation of the Holy Cross. The Institute sponsors an annual convocation for educators and an annual conference for student leaders (Holy Cross Institute, 2015, “Events”). Benedictine schools are organized on an international level, with conferences and meetings in various regions of the world (International Commission on Benedictine Education, 2015). Despite the existence of such programs, some schools still have issues transmitting the founding order’s charism. Evidence of the presence of charism can be seen in artifacts, but without strong formation plans, lay staff members cannot clearly articulate institutional values (McDermott, 2006). In Benedictine schools, reliance on the religious community of monks to convey a sense of identity resulted in a lack of clarity in the articulation of Benedictine charism when those communities declined (Englund, 1995). In schools supported by such networks, institutional identity is tied to charism (Brandao, 1993; Ferrera, 2000; Fisher, 2003; Lynch, 2011; Vercruyssen, 2004). Mercy secondary schools, like those sponsored by other religious organizations, have attempted to work together to try to advance the charism of their founder and sponsoring order. The Network for Mercy Education, started in 1999, offers several programs designed to foster collaboration among Mercy educators. One such program is the Network’s annual Leadership Academy, which aims to “strengthen knowledge and understanding of the charism, core values and tradition of Mercy elementary and secondary education and to support those in leadership roles and roles of influence to fulfill their role in furthering the mission” (Network for Mercy Education, 2014). The stronger a Mercy school identifies with the Mercy charism, the more effective it is in educating students (McCrea,

2004).

Networks exist among secondary schools to promote charism on a national or international level, but what happens in individual schools tied to those networks may be different. In schools without formal programming to address charism, qualities such as communication and staff empowerment were associated with stronger presence of charism (McDermott, 2006; McNicholas, 1990). Existing staff programming often takes the form of speakers or workshops (Egan, 2009; Florio, 2013), and is more effective when part of a structured approach to staff development (Hession, 2001).

### **Conclusion**

Questions shaping this study surround how charism in Mercy secondary schools is conveyed to staff members through professional development. This chapter examined literature related to organizational culture and identity, Catholic charism, professional development, induction programming, and current practices in Catholic secondary schools. Major conclusions from this review are that organizations do have a sense of culture and identity, and that Catholic organizations use the term charism to describe this. Effective professional development and induction programming in schools have particular characteristics, including characteristics of format and duration. Professional development in Catholic schools includes an additional aspect of spiritual development, or formation, for staff members at these schools. There are a variety of efforts in place to help staff members in various Catholic secondary schools understand the charism of their sponsoring institutions.

## **Chapter 3**

### **Research Methodology**

According to the National Center for Education Statistics (2013), in 2011 nearly 4.5 million students in the United States attended private schools. A large number of those schools had a religious affiliation, many of which were Catholic schools. The ability of Catholic schools to convey a sense of identity and charism depends upon the staff within those schools. There are 41 secondary Mercy schools in the Americas including 30 located in the United States. The results of this study can be significant because Mercy Institute Leadership can gain further insight into how the charism is being implemented in the schools in this study. Results regarding effective professional development and the proposed model for charism professional development could be helpful in planning future programming as discussions continue regarding the sustainability of Mercy secondary schools for the future. This study could also give other schools ideas for ways to better convey charism in their buildings, or can help schools to better describe and address their own strengths and weaknesses. Although the discussion of charism is a Catholic one, many schools, both public and private, work to create a particular culture in their buildings, and convey certain values to the staff members working there.

### **Research Sample and Data Sources**

Mercy-sponsored secondary schools exist throughout the world. In the United States, there are not only Mercy-sponsored secondary schools, but schools that are co-sponsored by other religious organizations as well as elementary schools sponsored or co-sponsored by the

Sisters of Mercy. This study focused on the 30 Mercy-sponsored or Mercy-cosponsored secondary schools in the United States.

The researcher is affiliated with one of the 30 Mercy-sponsored secondary schools, and is directly involved in planning and facilitating staff induction and professional development at the school. Because this study focused on examining these programs at Mercy-sponsored schools, the researcher's school was not included as part of the study, but was part of a pilot phase before the main study began. The researcher's school was selected for the sake of convenience, both in terms of time and location, but also to avoid conflicts as the researcher is directly involved in the programs and activities being studied. Administrators at the school consented to staff members' potential participation in the study, and allowed the researcher to contact staff members by e-mail regarding the project.

The researcher obtained contact information for administrators (presidents if applicable and principals or heads of school) at each school from school websites or contacts through the Mercy Network for Education. The researcher contacted administrators at each Mercy-sponsored secondary school by e-mail (see Appendix A) in August 2015, explaining the study and requesting participation from staff members at the school. Administrators at 11 of the 31 schools agreed to have staff members at their schools participate, although one of those administrators did not distribute the survey link to staff, resulting in a total of 10 schools participating.

Throughout this chapter and subsequent chapters, these schools will be referred to by pseudonyms (School A, School B, School C, School D, School E, School F, School G, School H, School I, School J) to protect respondent anonymity. The researcher listed the ten schools in an Excel spreadsheet and generated random numbers to correspond to each school. The researcher

then sorted the list of schools based on those random numbers and then assigned letter pseudonyms in alphabetical order to each school.

The ten schools in this study are located in seven different states. The schools represent all five of the United States-based regional communities of the Sisters of Mercy of the Americas (Mid-Atlantic, Northeast, NYPPaw, South Central, West Midwest). Two schools are co-ed; the others are all-girls' schools. One school has elementary-aged students as well as secondary students; the others are secondary only.

### **Data Collection Methods**

This study consisted of two survey phases. The initial survey was tested in June 2015. Administrators at one Mercy-sponsored secondary school gave permission for the researcher to contact staff members by e-mail. The researcher sent a draft of the survey to staff members at this school. Revisions to two questions were submitted to the researcher's IRB in response to questions from staff members regarding the wording of survey questions. The IRB granted approval to the revisions before the survey phase began.

Surveys are commonly considered to be instruments to gather numerical data for analysis. Surveys can, however, provide other information as well. Qualitative surveys can be used to study diversity within a population (Jansen, 2010). This study examined the diversity of the presence of charism in Mercy secondary schools, so questions on the survey helped to establish that diversity. Constructs are variables that cannot be directly observed (Gravetter & Wallnau, 2011). Charism, and specifically for this study, Mercy charism, is such a construct. The survey for this study incorporated the first part of the instrument "Mercy Charism and its Relationship to Effective Schooling" (McCrea, 2004), which measured and defined Mercy charism according to several factors: concern for women and women's issues, educational

excellence, world vision and responsibility, collaboration, spiritual growth and development, and compassion and service. Mercy charism is defined in this study as emphasis on women's issues in the school and school curriculum, school-provided opportunities for service, collaboration with other Mercy schools, education about Catherine McAuley in the curriculum, presence of daily prayer, emphasis on spiritual development of students, and staff modeling of values for students, all measured with Likert scales with five options: Strongly disagree, Disagree, Neither disagree nor agree, Agree, Strongly Agree (Likert, 1932). McCrea's (2004) study did not attempt to conduct factor analysis on questionnaire items used. This study will include factor analysis of quantitative items.

The survey for this study was constructed using Qualtrics, a web-based software program for building surveys. The survey was sent to participants by e-mail using Qualtrics, along with a letter introducing the survey and requesting participation (see Appendices A, B). Staff members at six participating schools received the introductory e-mail and survey link in an e-mail forwarded to them by an administrator. Staff members at two schools received an e-mail and survey link sent through an all-staff e-mail distribution address. Administrators at the final two schools provided the researcher with a list of all staff e-mail addresses, so staff members at those schools received an e-mail and survey link sent to their specific e-mail address.

### **Data Analysis Methods**

Data was analyzed in several ways. Reports within Qualtrics provided information about the number of participants, and allowed for the separation of data based on school. Questions with Likert response options were analyzed using the summary information for each question (number of responses for each option and percentage of total responses) provided in Qualtrics.

Responses were coded using attribute coding for school, years of service, and responsibility for professional development.

Cronbach's Alpha is a measure of reliability of survey items (Tavakol & Dennick, 2011) and can be used to demonstrate that questions in a survey measure an underlying variable (Sullivan & Artino, 2013). Mean scores can also be calculated for Likert-based survey items as another way to numerically describe data (Sullivan & Artino, 2013). Correlation describes the relationship between uncontrolled or unmanipulated variables using statistics (Gravetter & Wellnau, 2011). The program SPSS was used to calculate Cronbach's Alpha, means, and regression models for all respondents in the study, and individual schools. Factor analysis helps to examine relationships between variables (Muijs, 2011). The researcher conducted factor analysis using SPSS. Oblique rotation methods were used, assuming some correlation between factors. An oblique rotation method will produce results similar to an orthogonal rotation if factors are not in fact correlated (Osborne, 2015).

Data obtained through open-ended survey questions was analyzed using structural coding, descriptive coding (Saldaña, 2013) and in vivo coding (Saldaña, 2013). Before coding open-ended responses from participants, each participant's total set of responses was assigned an alphanumeric identifier (letter of their school identifier and number) that could be cited in the reporting of data. This list of identifiers and responses was kept in a password-protected file on a password-protected laptop and backed up in a password-protected cloud storage service (Box).

This study explored how staff members at Mercy schools understand Mercy charism, how professional development programs at these schools convey charism, and the relationships between charism identification and charism-related professional development. The first question addressed by the study was: How do staff members at Mercy schools understand Mercy

charism? Questions two through 12 of the initial survey measured various aspects of school life which together could be indicative of charism. A mean score for charism was calculated for each school in the study. The second question addressed by the study was: How do current professional development programs convey Mercy charism to staff members at Mercy schools? Four open-ended questions asked participants to describe the format of and topics covered in charism-related professional development in their schools. Results from closed-ended questions were analyzed by calculating means of scores for each school, and data from open-ended questions was analyzed using various coding methods (Saldaña, 2013). The third question addressed by the study was: How are the degrees to which staff members at a Mercy school identify with Mercy charism related to the amounts or type of professional development related to Mercy charism offered by the school? Four closed-ended questions in the initial survey asked participants to indicate the degree to which their professional development has helped enhance understanding of charism.

Questions in the follow-up survey (see Appendix C) asked participants to indicate the degree to which retreats and other forms of professional development have helped to enhance understanding of charism and the degree to which professional development has helped participants integrate elements of Mercy charism into their daily work. This data was analyzed using descriptive statistics.

Data from the two surveys was treated separately. The anonymity of the survey did not allow for an accurate merging of data. Although the follow-up survey asked school respondents to indicate if they had completed the initial survey, there was not a way to match an individual's responses on each of the surveys. The benefits of respondent anonymity (greater likelihood of

honest responses) outweighed the benefit of being able to combine data from the two surveys on an individual level. Rather, data from both surveys was analyzed by school.

### **Summary**

This chapter described the methodology used for this research study. It described the recruitment and selection process for the schools included in the study, the methods used to collect data for the study, and the ways participant data was protected. This chapter also summarized the plan for analysis of data relevant to each of the study's sub-questions. The following chapter illustrates the findings from that analysis.

## **Chapter 4**

### **Results and Data Analysis**

This study seeks to highlight how transmission of Mercy charism in Mercy secondary schools in the United States is facilitated by staff development. Sub-questions include how staff members in these schools understand Mercy charism and how stakeholders in these schools convey Mercy charism to staff. This chapter includes a description of the data collected in the study. It begins with a general overview of demographic data from all survey participants. The report then discusses data relevant to each of the sub-questions in this study.

Participants completed their survey during a period beginning in late September 2015 and ending in late October 2015. The data set includes responses from 168 participants: 17 from School A, 11 from School B, 10 from School C, 30 from School D, five from School E, 22 from School F, 18 from School G, seven from School H, 16 from School I, and 32 from School J. Some surveys (66) were completed partially – this ranged from opening the survey and answering no questions to answering all questions except the last one. This report includes data from partially completed surveys when provided.

Staff members from seven schools completed a follow-up survey in March 2016. The data set includes responses from 96 participants. The majority of participants in this survey (n=49) indicated that they had completed the first survey in this study. 24 respondents indicated that they did not recall if they had completed the initial survey or not, and 10 respondents indicated that they did not complete the initial survey.

Table 1

*Number of Respondents and Response Rates from Participating Schools*

	Staff	Respondents (n=)	Response Rate
School A	60	17	28%
School B	60	11	18%
School C	80	10	12.5%
School D	82	30	36.5%
School E	23	5	21.7%
School F	88	22	25%
School G	83	18	21.7%
School H	65	7	10.8%
School I	67	16	23.9%
School J	124	32	25.8%

### **Demographic Information**

Survey participants self-reported all demographic data. The majority of respondents indicated that they are faculty or teachers at their schools. Those indicating “other” described their positions as counselor (three), campus ministry (two), directors of finance or curriculum (two), learning specialist, cafeteria manager, and media center volunteer.

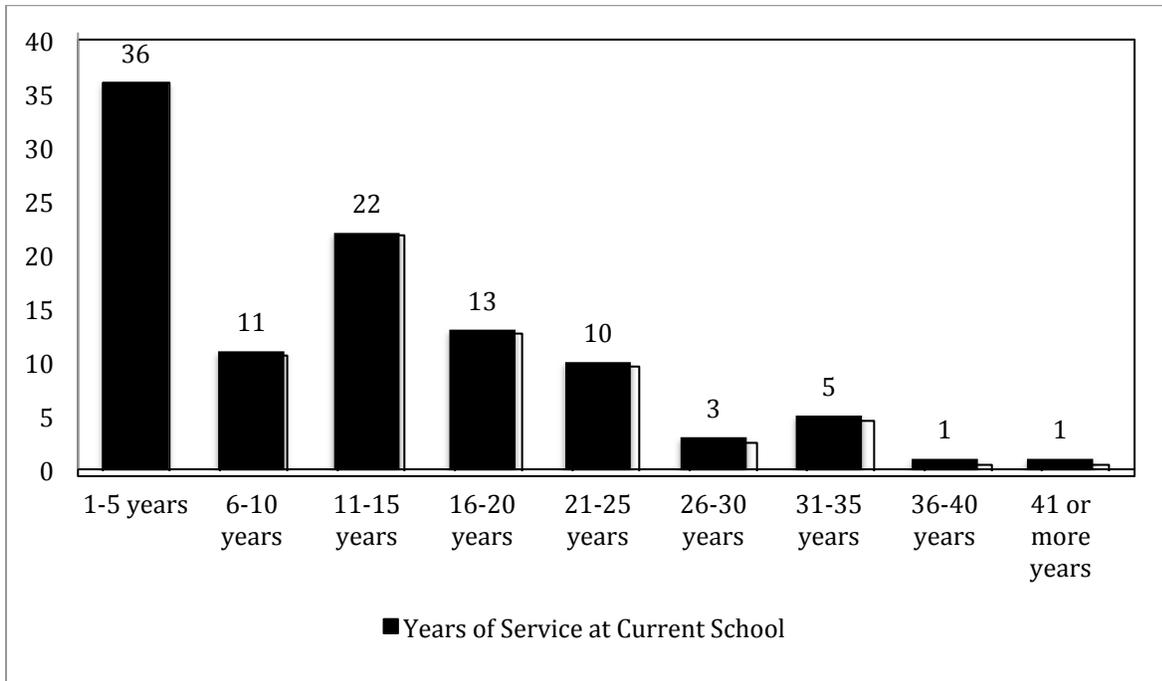


Figure 1: Distribution of survey participants by years of service at current school.

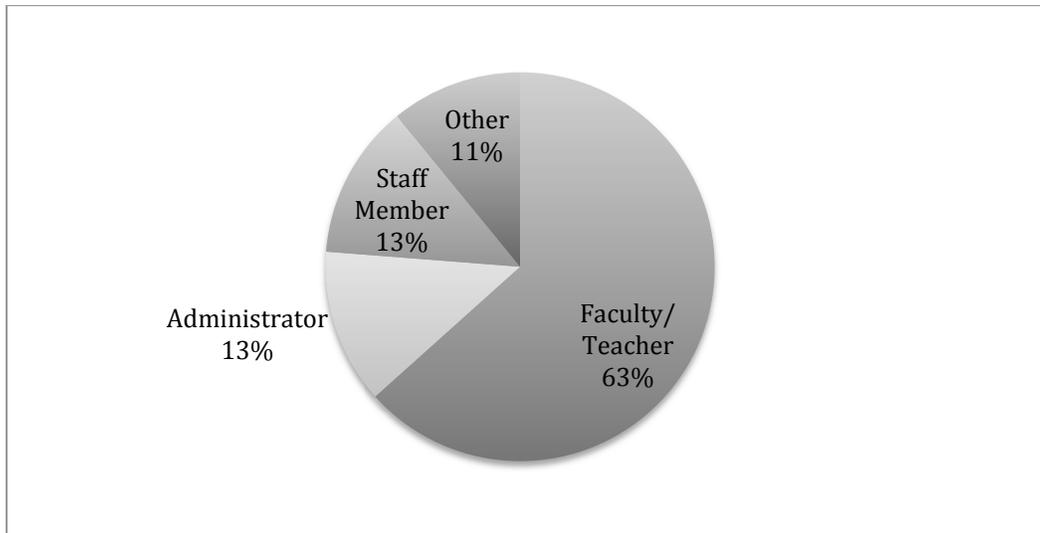


Figure 2: Distribution of survey respondents' current positions at school

The survey asked participants if they were a graduate of a Mercy secondary school, a Religious Sister of Mercy, a Mercy Associate, or a Mercy companion. The majority of respondents (66%) indicated no to this question. Most respondents (80%) indicated that they are not responsible for planning or facilitating staff orientation activities or professional development at their school.

### **Identifying Characteristics of Mercy Charism**

The first research question in this study was “How do staff members at Mercy schools understand Mercy charism?” Eleven survey questions addressed various characteristics of Mercy charism: concern for women and women’s issues (three questions), connection to communities outside the school through service or collaboration with other Mercy schools (two questions), spiritual development of students (three questions), school climate (two questions), and information about Catherine McAuley in the curriculum (one question). Survey questions asked participants to respond to statements regarding presence of these characteristics in their school buildings. Cronbach’s Alpha and mean scores for charism were calculated for each school in the study and all schools together.

The majority of participants (86%) indicated that professional development at their school helped them to understand elements of Mercy charism. The same percentage of participants indicated that their staff orientation at their current school helped them to understand Mercy charism. Although percentages were equal for each statement, the number of participants indicating “strongly agree” for the question about professional development was greater than the number indicating “strongly agree” for the question about staff orientation and charism. The strongest responses for participants were in the areas of school climate, presence of daily prayer in the school, and opportunities for service in the outside community.

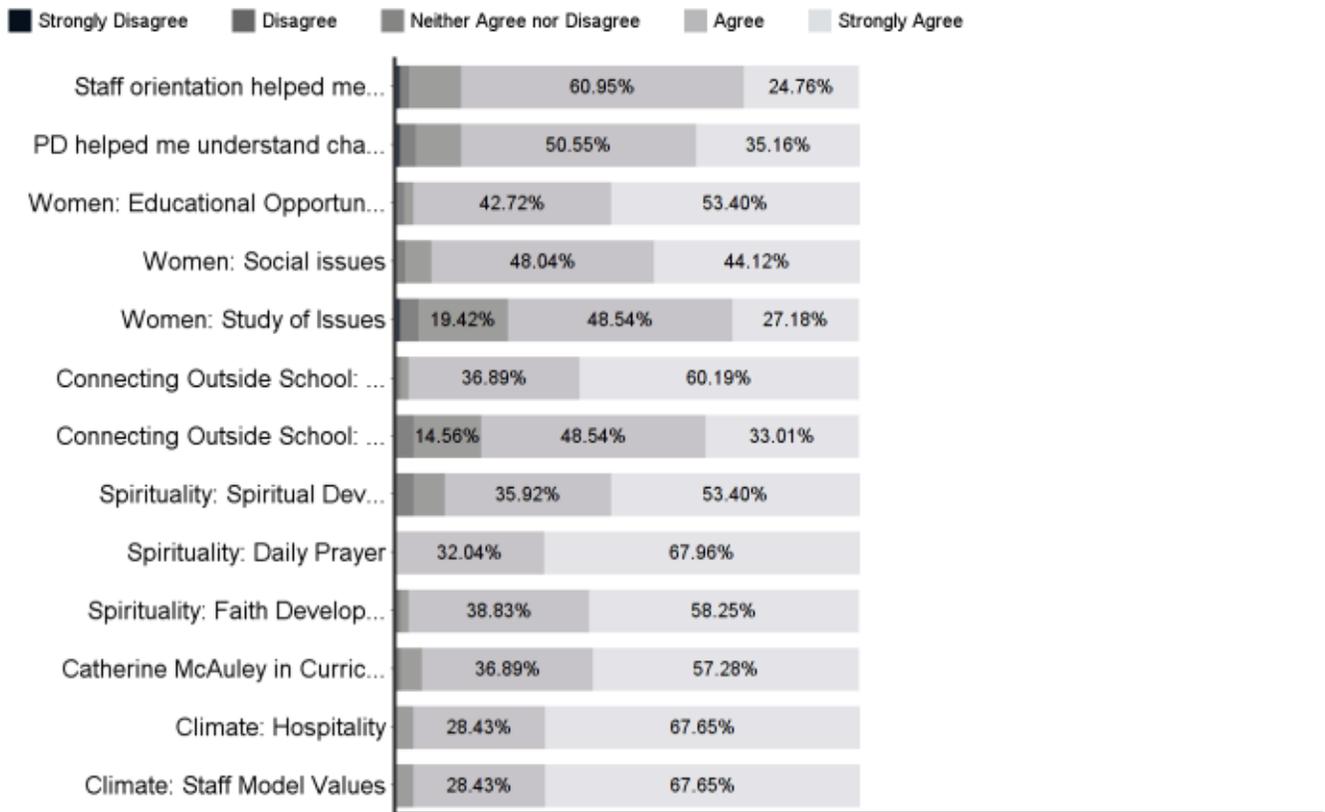


Figure 3: Responses to Likert scale questions in initial survey.

The Cronbach’s Alpha for the Likert scale items measuring charism (survey questions 2-12), in the survey was .849, above the generally accepted reliability level (Nunnally & Bernstein, 1994). Calculated Alpha levels for individual schools showed that the level for School G was below the threshold of .70, but levels for other schools were above. This indicates that survey answers regarding charism were least consistent at School G.

The Likert scale for this survey included five options: Strongly Disagree, Neither Agree nor Disagree, Agree, and Strongly Agree. These options were given corresponding numerical values from 1 to 5 (with 1 corresponding to Strongly Disagree and 5 corresponding to Strongly Agree) in order to calculate numeric means.

Table 2

*Reliability Statistics: Cronbach's Alpha Levels for Individual Schools*

School	Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
A	.794	.804	11
B	.926	.937	11
C	.897	.901	9
D	.734	.764	11
E	.724	.696	11
F	.887	.896	11
G	.654	.675	11
H	.863	.872	11
I	.877	.885	11
J	.884	.907	11

Table 3

*Mean Charism Scores for Individual Schools*

School	Mean	Minimum	Maximum	Range	Maximum / Minimum	Variance	N of Items
A	4.350	3.462	4.769	1.308	1.378	.181	11
B	4.299	3.857	4.714	.857	1.222	.067	11
C	4.574	4.167	4.833	.667	1.160	.049	9
D	4.373	3.526	4.842	1.316	1.373	.146	11
E	4.127	3.200	4.800	1.600	1.500	.186	11
F	4.152	3.667	4.500	.833	1.227	.072	11
G	4.711	4.455	4.818	.364	1.082	.021	11

H	4.409	3.500	4.750	1.250	1.357	.141	11
I	4.414	4.111	4.667	.556	1.135	.047	11
J	4.584	4.071	4.929	.857	1.211	.069	11

The researched conducted factor analysis on quantitative data (Questions 2-12) from the initial survey. The items included for analysis met commonly used standards for determining factorability of correlations. The Kaiser-Meyer-Olkin measure of sampling adequacy was .808, above the commonly accepted threshold of .6. Bartlett’s test of sphericity was significant ( $\chi^2(55)=448.606; p<.05$ ), indicating that this data is considered suitable for factor analysis.

Initial analysis revealed two factors with Eigenvalues greater than 1, representing in 42% and 16% of variance respectively. A third factor had an Eigenvalue of .925 representing 8.4% of total variance. Analysis limited to the two factors with Eigenvalues over 1 resulted in cross loading of two values, so additional analysis was done using three factors. Additionally, a scree plot revealed a leveling off of Eigenvalues after three factors.

Table 4

*Factor Analysis Pattern Matrix<sup>a</sup>*

	Component		
	1	2	3
The school attempts to provide educational opportunities to women from all socio-economic areas...		.957	
The school provides education about social issues affecting women.		.496	.594
The school integrates the study of issues affecting women in academic disciplines across the cur...			.648

The school provides students with opportunities for service to poor women and children in the co...	.685
The school collaborates with other Mercy educational organizations and associations.	.798
The spiritual development of students is seen as the responsibility of all those who work within...	.616
The school's curriculum provides education about Catherine McAuley and the Mercy charism.	.592
The school provides daily prayer rooted in the charism.	.542
The school has a hospitable climate that displays a reverence and dignity for each individual.	.843
The school culture provides an environment for students to become persons of faith and to develo...	.779
The school staff models the values of the Mercy charism in the day to day life of the school.	.780

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The resulting analysis shows that Factor 1, labeled "Spirituality in the School Environment", is comprised of five items: hospitable climate, staff models values, environment for faith development, responsibility for spiritual development, and daily prayer. Each of these items relates to a sense of spirituality in the school environment, whether it is in something concrete such as daily prayer, or something underlying that, such as a belief in responsibility for students' spiritual development. Factor 2, labeled "Concern for Poor, Women", is comprised of three items: educational opportunities to women from all socio-economic areas, service to poor women and children, education about social issues affecting women. The item regarding education about social issues affecting women loaded onto both Factors 2 and 3. Further raising the threshold for coefficients (to .5, for example), would eliminate this item from Factor 2. Factor 3, labeled "Education," is comprised of four items: collaboration with other Mercy educational organizations, integration of issues in the curriculum, education about issues

affecting women, and education about Catherine McAuley. Each of these variables addressed content of school curriculum or a network or collaborative process that might affect composition of curriculum. These three factors: spirituality in the school environment, education, and concern for people who are poor, particularly women, can be considered factors of the concept of Mercy charism.

**Open-Ended Responses**

The second research question in this study asked how current staff development programs at Mercy schools convey the Mercy charism to staff members. Open-ended survey questions asked participants to respond to four prompts: Describe the organization or format of the staff orientation activities, Describe the content or topics covered in the staff orientation activities, Describe the organization or format of professional development at your school related to Mercy charism, Describe the topics or content covered in the professional development related to Mercy charism.

Table 5

*Format and Facilitators of New Staff Orientation/Induction Programming*

	What is the format?	Who facilitates or leads?
School A	Two- to three-day archdiocesan workshop (A2, A9, A11) Two days at school	Administration (A10) Guest speakers in professional development (A3)
School B	One-day meeting prior to all-school in-service (B1, B2) Meetings “several times throughout the year to check in” (B4)	Assistant principal (B3)
School C	Two-day meetings Small-group format (C1, C2)	Administration and staff personnel (C3) President, principal, assistant principal (C5)

School D	<p>“two days before normal beginning of the year in-services” (D15)</p> <p>“most new teachers in a room” (D8)</p> <p>“met with principal” (D10)</p> <p>mentoring program (D15)</p>	<p>Administration (D16)</p> <p>Principal (D10)</p> <p>Presenters (D2)</p> <p>Own teachers or speakers invited (D11)</p> <p>“other pertinent staff members” (D25)</p>
School E	<p>One-day meeting for new staff before all-staff retreat (E2)</p> <p>Weekly professional learning community meetings (E2, E5)</p>	<p>Principal (E3)</p>
School F	<p>All-day meeting for new employees of diocese (F11)</p> <p>New teachers’ orientation and orientation to the work of the Sisters of Mercy (F5)</p>	<p>Department chair (F7)</p> <p>Principal (F11)</p> <p>Guest speakers (F21)</p>
School G	<p>One- or two-day program<sup>4</sup></p> <p>Year-long induction (G8)</p> <p>Follow-up meetings with “internal mentors specific and relevant to our domains” (G18)</p>	<p>Administration</p> <p>Department chairs (G3)</p>
School H	<p>Small group (H3)</p>	<p>Principal and president (H3)</p>
School I	<p>One-day meeting before all-staff meetings (I5)</p> <p>Meetings throughout the year and into the second year (I5)</p>	<p>Senior faculty and staff (I2)</p> <p>[Specific Administrators](I4)</p>
School J	<p>New staff day (J2)</p> <p>Various size groups (J5)</p> <p>Mentor for the first year (J14)</p>	<p>Administration (J12, J14, J21)</p> <p>Mentor teachers (J2, J5, J8, J22)</p> <p>Department chairs (J12)</p>

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Survey questions addressed respondents’ experiences with induction programming at their school. Open-ended questions asked participants about the organization or format of staff orientation activities at their school, and about the content of staff orientation activities.

<sup>4</sup> Two respondents (both working at the school from one to five years) from this school described a one-day orientation, but two respondents (both facilitators of professional development at the school) indicated a two-day orientation.

Attribute coding was used to identify data in the set from respondents with one to five years of service at their school or those respondents responsible for design or implementation of professional development at their school (in a small number of cases, respondents were both new to their schools and responsible for professional development). This coding presumed that these respondents would be most likely to have the most current knowledge about current practices at their schools.

### **Format of orientation or induction programming.**

All schools that participated in this survey had some sort of orientation or induction programming for new staff members before the school year began, usually in the days before all-staff retreats or meetings. The table below summarizes the format of orientation or induction programming at each school as well as persons involved in the facilitation of that programming as reported by survey respondents (note that the initial survey did not explicitly ask respondents who facilitates induction programming at their school).

The follow-up survey asked respondents to indicate who plans induction programming at their schools. The majority of responses identified administrators, campus ministers, and other teachers at the school as the primary planners and facilitators of induction programming related to charism. Responses of “other” included descriptors such as an administrative position, department chairs, guidance counselors, or student leaders.

### **Format of professional development related to charism.**

All schools that participated in this survey had some sort of professional development related to Mercy charism. The table below summarizes the professional development described by respondents. The table also summarizes persons involved in the facilitation of that

programming, as reported by survey respondents (note that the survey did not explicitly ask respondents who facilitated the professional development).

Table 6

<i>Format and Facilitators of Charism-Related Professional Development</i>		
	What is the format?	Who facilitates or leads?
School A	Presenter (A4, A5) Discussion (A4) Service days Retreats (A9)	Guest speaker (A3)
School B	In-service (B1, B4) Faculty/staff retreats (B5, B7) Meetings with other schools	Guest speaker (B1)
School C	Retreat day (C6) Faculty meeting	
School D	Day-long in service (D7, D14) Leadership conference (D6) Woven into all in-services (D10) Meetings with other schools (D14, D15, D16)	Guest speakers (D7) A sister President and Principal (D16) Teachers (D29)
School E	Presentation (E5) Meetings (E1)	Sisters of Mercy (E1, E5)
School F	Hosting MSEC (F3) Meeting for new teachers (F8) PD days with guest speaker (F11)	Guest speaker (F11, F21) Sister of Mercy (F8)
School G	Professional development days (G1) Faculty/staff retreat (G2) Network programs (G6, G7, G8, G9, G18) Clubs and activities (G2)	Guest speakers (G3)
School H	In-service format (H4) Community service (H1)	

School I	Meetings (I1, I2) Professional development days Meetings with other schools	Senior faculty and staff (I2)
School J	Integrated into faculty/staff retreat (J3, J9) Faculty service (J2) Retreat days (J6, J7, J10, J13)	Sisters

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The follow-up survey asked respondents to indicate who plans professional development regarding charism at their schools. The majority of responses identified administrators, campus ministers, other teachers, and Sisters of Mercy at the school as the primary planners of professional development related to charism. Responses also included outside persons as facilitators of professional development. Responses of “other” included descriptors of an administrative position at one school (School I). The follow-up survey also asked respondents to indicate how many charism-related days of professional development they had experienced during the 2014-2015 school year. 60% of respondents indicated one to two days of charism-related professional development. The survey also asked if a respondent’s school holds a retreat for staff members each year. 79% of respondents indicated “yes” to this question. One respondent from School H added a comment at the end of the survey regarding this: “One note: We have staff retreats some years and some years not. Lately we have not been having as many.”

### **Thematic Data Related to Induction Programming**

Survey responses indicate the myriad topics addressed for new staff members in a school. Orientation programming included topics common to most employees of a new company: “HR, payroll, expectations” (J11), “administrative processes, reporting procedures and expectations” (A6) “safe environment, emergency management plan” (J9), “how to access various people and programs” (F5), “paperwork completion” (B1), “contractual obligations, scheduling quirks,

physical plant orientation” (B6). Programming also included topics which might apply to any person beginning work in a school: “teaching strategies, teaching for mastery” (E2), “school items like goals for the year” (C2), “how the school is set up. Trimesters” (D10), “special schedules, grading, lesson plans, safety drills, student handbooks” (J22). There are also issues of student safety: “concussions” (D13), “teen suicide prevention, cutting and seizure training” (H2)

Programming at these schools also covered topics particular to Catholic schools or that just that school. These included “religious formation of self and of student” (J18), “Protecting God’s Children [a program required by many Catholic dioceses for employees or volunteers in ministries]” (G9), “facilitated discussion about our vocation as teachers” (A12), “mission topics such as the fundamental reason for [the school]” (F5), “Catholic education and importance and differences” (I2). Programming included Mercy-specific topics: “the life and mission of Catherine McAuley” (F3) “the mission and activities of the order” (I6), “reminders of centering yourself in the Mercy and school mission as well as the school wide theme for the year” (J7), the school’s “connection to the wider world of Mercy” (G9). Respondents at six schools mentioned that their orientation programming used *Circle of Mercy*, a 1994 biographical video about Catherine McAuley produced by Mercy International Association. Nineteen respondents from six different schools used the phrase “Mercy charism” in their description of the content of their induction programming. Five participants from two different schools used the phrase “Mercy core values” in their responses. One respondent mentioned “critical concerns” (F6).

Information overload can be common in orientation programs that try to cover a large amount of information in a short time (Sims, 2006). This can be avoided by providing materials that can be reviewed later, including only essential information, and following up with

employees. Survey respondents referred to handbooks and handouts as part of their orientation programming. Mercy-specific handouts included a book of “prayers written by and for Mercy educators (J2) and a bookmark (D7).

### **Change over time.**

Some of the survey responses describe changes to induction programming over time, or that things had not changed. Two respondents from School F, both of whom have been working in the school for more than 20 years, described meeting several times during the first year “to learn all about Catherine McAuley and the Sisters of Mercy” (F2). Another respondent from the same school noted “through the years they have changed from school led meetings to an outside motivational speaker” (F16). A respondent from a different school described many of the activities named by newer employees: “It was 40 years ago. I guess it was about classroom management, the place in the overall curriculum that my courses filled, Catherine McAuley’s life and charism, history of the school, forms, forms, forms...” (D6).

### **Atmosphere.**

Survey respondents also described implicit results of their induction programming. Days of orientation helped new employees become part of their school community. “To tell the truth, I really can’t remember the specific topics, but I do remember how welcoming everyone was and eager for us to succeed” (F11). Programming helped in “getting to know one another” (G18). One school used “team building games” (A9; A11). Sharing from a retreat throughout the subsequent year “helps build community and camaraderie” (A7). The experience may have provided a connection with an individual or a group: “I don’t remember that much, but I do remember that I have a mentor who answered my questions” (J30). One respondent stated that

new employees “met as a group several times through the year. This small group of teachers formed a bond and we continue to seek one another out to check in” (B4).

### **Non-typical employee experiences.**

One issue revealed by the data is that the experience of employees who begin in the middle of a school year is different than those who participate in start-of-the-year induction programming and meetings. School A’s induction programming involved five days of meetings before the first day of school. School G had two days of programming. “I did not participate in the official teacher orientation because I came mid-year as a long-term substitute” (G4). “I watched a video over child protection” (A2). Needs of new staff members who have familiarity with the school may be different than those who do not. “Of the five new faculty and staff that year, two were returning alums and one returning teacher” (J12). In that case, the frame may shift to what has changed rather than introducing content as new, although in that particular group, not all members had prior experience with the school.

### **Themes in Data Related to Professional Development**

Respondents at all participating schools mentioned the biographical story of Catherine McAuley and the history of the Sisters of Mercy as a topic for professional development. Some descriptions of this history were broad and informational, such as “the life of Catherine and the formation of the Sisters of Mercy” (A5). The primary sources for this history are generally memoirs from people who lived at her time, collections of her sayings, and foundational documents for the order (Rule, Constitutions, Retreat Instructions) (Sullivan, 1999).

Respondents from two schools specifically mentioned the use of Catherine McAuley’s correspondence: “we often use her writings” (G9). These letters are seen as the primary source for insight into Catherine’s thoughts and motivations (Regan & Keiss, 1988; Sullivan, 1999).

Catherine McAuley opened her first “House of Mercy” in Dublin, Ireland, on September 24, 1827. The anniversary date is “the great feast that unites the Mercy world” (Mercy International Association, 2013, “Mercy Day Message”). Schools commemorate this day (J6; H1; E3) through activities or prayer (J10): “on some Mercy Day (9/24) celebrations we explore the Mercy charism through various activities” (G3).

Some responses noted that their professional development connects that history to the current school experience. One school discussed “charisms as related to Catherine’s time transferred to working in our times” (E1). Another described learning about Catherine McAuley’s story in the context of “our carrying it out in 2015” (J7). Other schools had similar conversations surrounding the Mercy charism or values. One discussed “mercy values and how they relate to what we’re doing at our school” (A12). Another described “discussion of each point of the charism and how we as individuals translate them into action” (D11).

Eight of ten schools directly mentioned critical concerns as a topic of professional development. Multiple respondents from a ninth school used the term Catholic Social Teachings in describing the content of their professional development. The term Catholic Social Teaching refers to an “essential part of the moral teaching of the Church” (USCCB, 1999). The USCCB summarized seven themes of this body of teaching in the document *Sharing Catholic Social Teaching: Challenges and Directions*: Life and Dignity of the Human Person, Call to Family, Community, and Participation, Rights and Responsibilities, Option for the Poor, Dignity of Work and Rights of Workers, Solidarity, and Care for God’s Creation. The critical concerns of the Sisters of Mercy are problems or issues directly related to these themes. Respondents from the tenth school described “mission work” and “service to community” (H1) as well as professional development discussions about “how do we show Mercy as a school to the community” (H3). It

was unclear from survey responses if the critical concerns are used as a framework for that mission or service or as a response for showing Mercy to the community, but it is possible.

**Format and facilitation.** Survey responses indicated a wide variety of topics for professional development related to charism, and also indicated a variety of ways in which that occurs. Some development occurred in the context of regularly scheduled faculty meetings (School A, School J). Other development occurred in the context of professional development or in-service days (School A, School B, School D, School J). “We have certain professional development days during the school year usually one is devoted to Mercy charism” (F11).

Respondents also described various speakers brought in to facilitate or be part of these professional development experiences in some way. These included board members (A8) or administrators from other Mercy schools (A12). The most common response when a facilitator was specifically mentioned was that the facilitator or guest speaker at a professional development session was a Sister of Mercy (Schools A, B, D, E, F, G, I, J).

**Staff retreats.** Survey respondents indicated that faculty/staff retreats were a primary vehicle for discussing Mercy charism. “The Mercy charism has been a part of most every annual faculty-staff retreat day” (G3). These are often part of meeting or in service days for staff at the beginning of the school year and have a mercy focus: “our year begins with a retreat day to refocus on the charism” (C6). Other respondents noted “retreats are centered in the Mercy charism” (B5) and “we have mission gatherings and retreats that focus on the charism of the Sisters of Mercy” (I2). These retreats can be off-campus (B7), day long (D7), and annual (G2).

The format described by respondents is similar. A respondent from School J described the annual retreat as: “Prayer, overview of our mission; opportunity to discuss as a large group, small group, and contemplate individually. Lots of dialogue” (J7). A respondent from School A

described “group discussion, self-reflection, and small group discussions involving Catholic Social Teachings and Mercy values, including Mercy charism. Typically all that we do and the discussions that we have are related to one of these topics” (A5).

**Collaboration.** One of the stated values for the Mercy Secondary Education Association was collaboration. Several schools in the survey described using collaborative strategies for professional development. “We teamed with [another school] for a presentation” (B4). “We have joint meetings with [another school]” (I2). Respondents from one school described a workshop for Mercy schools within their region. “There were workshops on how to incorporate all aspects of mercy school in your day to day classroom” (D15). Schools also described utilizing programming from the Network for Mercy Education. This could include materials such as “power points by Mercy Education Networks” (E5) or a more in-depth script with resources and discussion prompts. “More recently, we’ve gone through a 2-phase process of better embracing the mission of our school and the charism of Mercy. I think it was called something like ‘Who Will Tell the Story’” (G18). “We have used to Serve in Mercy at Faculty Retreats” (G8). Respondents also included attendance at the annual Mercy Secondary Education Conference or Network Summer Leadership Academy as professional development opportunities that focus on the charism.

**Integration.** Several survey responses described integration of Mercy charism into other activities rather than or in addition to a stand-alone professional development day for staff members. School C has a retreat themed in the charism each year. The content from the retreat “is then reinforced at each faculty meeting through prayer, prayer services for faculty and staff, and sponsorship activities” (C6). Another respondent from School C noted,

we typically always begin a pd with a prayer service which is always related to or inclusive of the mission of Mercy and Catherine McAuley. Sometimes it is a brief service and sometimes more involved really addressing who we are, our values, traditions, etc. (C1)

A third respondent described prayers as “created by the Sisters” (C5). Schools D and J also described integration of charism in activities through the language of administrators or other school staff members leading those activities. A respondent from School J noted, “Our campus minister seems to integrate these types of messages and reminders into all staff meetings” (J6). A respondent from School D stated the charism is “woven into all in-services. The president and principal refer to it all the time” (D10). Another noted “we do discuss it [the charism] often and we do have organizations...that are living examples of the Mercy charism” (D13). School G respondents described the integration of charism into their school culture in both concrete and abstract ways. One concrete visual way was the posting of materials related to the charism. “Copies of [school’s] mission statement and mercy core values posted in EVERY classroom and office (in a prominent spot!)” (G6). More abstract ways included the influence of the charism in choosing school activities. A previous accreditation cycle at School G included a focus on charism.

We committed to an objective for growth based on Mercy spirituality, we took self-assessments of the understanding of the charism and our practice of the Catholic faith. The data collection was the basis for future staff retreats, reflections, and in-services. (G18)

The “critical concerns influence all of the service activities in the school, it is consistently linked to our heritage as Mercy” (G9). The campus minister at School G described the role of the charism in planning activities:

charism is the focus of all we do in Campus Ministry...whether it is preparing for a Faculty Retreat, student retreats, school Masses or working with the Ministry team in planning their weekly meetings. The Mercy Charism is integrated into everything we do.  
(G9)

Respondents from School A also described the integration of charism in various ways. “We teach all of our students about the Mercy values and include these in each course syllabus as well” (A10). Reminders of values include “posting in class to remind us” (A6) and “incorporating Mercy values into classroom” (A11). Multiple respondents described the sharing of “‘Mercy moments’ in which we see the charism lived out in the school” (A11). The language of the charism is integrated into staff meetings. “At our weekly staff development meetings/faculty meetings, the Mercy charisms and Catholic social teachings are interwoven. Some weeks they are specifically added into the agenda; some weeks are brought naturally into our discussions” (A7). One respondent summarized it as “we are all about Mercy here” (A6).

**Lack of integration.** Some respondents described a lack of integration of elements of the charism, or a change in the way that charism has been addressed in their school over time. Some responses also indicated inconsistency among respondents from the same school. One respondent from School J described the format of charism-related professional development as “n/a – staff position” (J14) indicating a lack of participation in the retreats, meetings, and prayers described by other respondents at the same school. Two newer employees (with one to five years of service) of School D indicated frequent references to the charism (D10) and described a

workshop experience related to Mercy charism (D15), although another newer employee stated “there isn’t much talk about the Charism in professional development meetings” (D8). Another respondent noted frequent discussions about charism as well as organizations that support the values of the charism, but “I do not recall any special format for the professional development of Mercy Charism at our school” (D13). Some respondents described professional development that had occurred in the past. “When the interest in charisms of mercy began to get traction we were presented with some historical and philosophical background” (D17). Another stated “I believe we were ‘in-serviced’ on Mercy charism at some point in my professional tenure” (D3) indicating that such programming is not ongoing. “It has been quite a while, and I do not remember what the content was” (D3). Others described that programming as consisting of in service presentations that were “informative but not extensive. General explanations of the aspects of the charisms and why they were part of the mercy tradition” (D17).

Responses from School F indicated a change in the way that charism has been addressed by the school. A newer employee (with one to five years of service) at the school noted that “new teachers were introduced to the reasons behind the founding of the Sisters of Mercy and their work with educating young women” (F5). Another newer employee noted that this meeting was “given by a Sister of Mercy” (F8) and discussed the “founding of the sisters of mercy, the values, the mission statement of the school, our duties within this” (F8). One respondent noted that there are fewer Sisters at the school: “Not many of them visible anymore around our school. It’s had an adverse impact” (F9). Other employees described practice at the school noting “We have certain professional development days during the school year usually one is devoted to Mercy charism. We have had speakers both lay and religious speak with us” (F11). Topics covered by this day have included prayer (F11), school mission (F10), and “socially conscious

global young women” (F10). These days incorporate a “guest speaker with time for individual reflection and group discussion” (F21). One participant described change related to this type of presentation: “This year, we had a speaker who frequently referred to the charism, but there wasn’t the depth of spirit or energy for the charism which I embraced many years ago” (F12).

Three respondents at school F described past practices at the school: “Four times during the year (for about 5 years), we met in small groups with two Sisters of Mercy to learn about/discuss how we integrated the Mercy charism into our role as teachers in a Mercy-sponsored school” (F6).

This respondent described the content of these sessions:

Usually we would focus on one of the Mercy core values or critical concerns, discuss our understandings of the values/concerns, and share ideas on how we could integrate these into our disciplines and our own lives as role models for our students. (F6)

Another respondent described this integration as challenging, noting the topics were:

Mostly about Catherine McAuley and related background stuff. I had a hard time connecting it to my teaching responsibilities. Frankly, I was so new to this culture that much of it went over my head as I was so focused on teaching my academic subject and trying to be a good male role model in this female-dominated setting that I didn’t connect the Mercy charism stuff with the challenges that I faced on a daily and even hourly basis. I was new to teaching...and, while I adored the Sisters and daily miss their daily and disciplined presence, they were largely a mystery to me. (F9)

This respondent also noted the small groups practice “was over ten years ago. We don’t do it in a formal PD setting since then” (F9). A respondent described the change in format as negative:

“Over the many years at my institution, professional development related to the Mercy charism

has devolved from a several day event to a mission integration program involving several round-table discussions to what feels like shallow lip service” (F12).

### **Follow-Up Survey: Preferences for Professional Development**

Questions in the follow-up survey asked respondents to rank in order of preference several options for charism-related professional development activities. One question asked participants to rank activities they thought would be most helpful in building knowledge of Mercy charism, and another asked them to rank activities they thought would be most helpful in incorporating charism into their work at school. Activities ranked first by the most respondents for building knowledge of charism were a presentation from a guest speaker, meeting face-to-face with staff members from other Mercy schools, and a presentation from someone within a respondent’s school. Items ranked second by the most respondents included presentations from guest speakers or people within the school, a small group conversation, or meeting virtually with staff members from other Mercy schools. Activities ranked first by the most respondents for incorporating charism into daily work were a presentation from a guest speaker, a presentation from someone within a respondent’s school, and meeting face-to-face with staff members from other schools. Activities ranked second by the most respondents were a presentation from a guest speaker or someone within the school, a small group conversation, or a virtual meeting with staff members from other schools.

Table 7

*Mean School Scores for Charism Understanding and Integration*

		Staff retreats help me understand Mercy charism.	Staff retreats help me to integrate Mercy charism into my daily work.	Professional development related to Mercy charism has helped me integrate elements of the Mercy charism into my daily work.
School		Mean	Mean	Mean
	C	4.20	4.00	3.29
	D	4.00	4.00	3.17
	E	4.00	4.00	4.00
	G	3.45	3.55	3.91
	H	4.00	4.00	4.00
	I	3.92	3.62	3.73
	J	4.00	3.67	3.67

**The Relationship Between Charism and Professional Development**

The third research question framing this study asked how staff members' identification with charism related to the types or frequency of charism-related professional development offered by their schools. Two questions on the follow-up survey (see Appendix C) asked participants about staff retreats at their schools. Two questions asked participants if retreats help to build understanding of Mercy charism and integrate that into their daily work. One question asked if professional development helped participants integrate Mercy charism into their daily work.

These scores indicate that respondents believe retreats and professional development related to charism are helpful in both building understanding of Mercy charism and helping individuals integrate Mercy charism into their daily work. It is interesting to note, however, that School G had the highest mean score for charism of schools responding to the first survey, and the lowest scores for these questions of schools responding to the follow-up survey, although these scores still indicated that participants thought charism-related retreats and professional development were helpful. Again, as in the original survey, there were responses that seemed to disagree with one another. For example, one question on the follow-up survey asked participants to indicate if their school had a yearly retreat for staff members. Three schools (Schools E, G, and J) had participants answer yes unanimously. Two other schools (Schools C and I) had the majority of respondents indicate yes to this question, and two participants at each school indicated no. Two other schools (Schools D and H) had the majority of respondents indicate no to this question. It is unclear if participants answered in this way because of the phrasing of the question, or if the presence of a yearly retreat is inconsistent at their schools, occurring in some years, but not in others. These answers may also indicate that understanding of charism happens through other ways that could not be measured by these particular surveys.

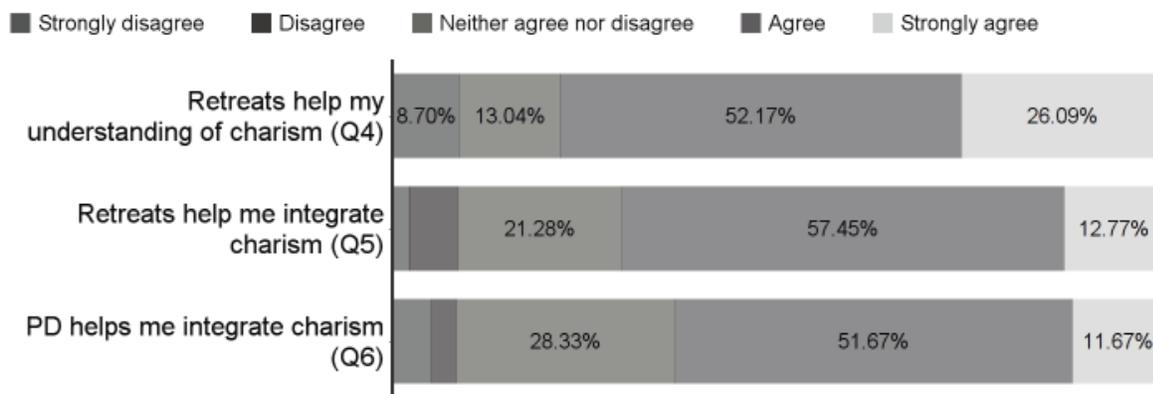


Figure 4: Scores for charism understanding and integration from second survey; all respondents.

**Summary**

A survey of staff members at 10 Mercy secondary schools in the United States found that respondents at these schools considered elements of the Mercy charism to be present in their school communities. They understood Mercy charism as the mission of Catherine McAuley and the Sisters of Mercy, including an emphasis on spiritual development, service, education, and concern for persons who are poor, particularly women. Professional development experiences related to charism at each school were varied, but included presentations from Sisters of Mercy or school staff members. All schools offered some type of induction experience for new staff members, although some persons did not participate in these experiences due to their employment beginning at a different time of the year. Induction experiences were also varied, and included presentations and mentoring in some cases. Administrators, campus ministers, and other teachers were the primary facilitators of this programming. Some responses indicated a change over time in particular schools in regards to how charism was addressed through professional development efforts. Staff members at seven of the schools surveyed in the first part of the study participated in a follow-up survey regarding aspects of professional development at their schools. Respondents indicated that charism-related professional development experiences, including staff retreats, helped increase understanding of charism, and helped individuals integrate elements of Mercy charism into their daily work. Survey responses indicated that presentations, either by guest speakers or staff members from within their schools, and face-to-face meetings with members of other Mercy schools were preferred methods for professional development related to charism.

## **Chapter 5**

### **Discussion**

This study examined charism and professional development in ten Mercy-sponsored Catholic secondary schools in the United States. The central question of the study was: How is transmission of charism facilitated by professional development? Sub-questions addressed by the study were: How do staff members in Mercy schools understand Mercy charism? How do current staff professional development programs convey the Mercy charism to staff members at Mercy schools? How are the degrees to which staff members at a Mercy school identify with Mercy charism related to the amounts or type of professional development related to Mercy charism offered by the school? Chapter 1 of this dissertation outlined the governance structure of Catholic schools, and Mercy schools in particular. It also described a shift in staffing of Catholic schools from almost exclusively vowed religious persons to almost exclusively lay persons. Chapter 2 reviewed literature related to organizational culture, organizational climate, organizational identity, and professional development. The chapter also examined literature related to these ideas as expressed in Catholic schools. Chapter 3 outlined the methods used to conduct this study and analyze the results. Chapter 4 presented demographic information about study participants, and statistical analysis of survey results. In this chapter, the researcher will discuss findings from the study, implications of those findings, and make recommendations for action regarding future research and future professional development planning.

### **Findings**

This study consisted of a survey and follow-up survey sent to ten Mercy-sponsored secondary schools in the United States. The initial survey consisted of demographic questions related to a respondents' position in the school, length of time in the school, vocational status (were they or were they not a Sister of Mercy, for example), and whether or not they had participated in charism-related professional development at their school. Eleven questions on the survey asked participants to identify various elements of Mercy charism in their school building. Four open-ended questions asked respondents to describe the format and content of charism-related induction programming and professional development. A follow-up survey asked questions to clarify persons responsible for planning and facilitating charism-related professional development at schools. Seven of the ten schools that responded to the initial survey participated in the follow-up survey. The follow-up survey also included questions asking participants to respond to statements regarding the presence of a staff retreat, and the effectiveness of retreats and professional development in increasing understanding of Mercy charism and integration of Mercy charism into daily work. Both surveys were distributed to participants and completed using Qualtrics, an online survey platform. Initial results were analyzed using Qualtrics, and further results were calculated and analyzed using the statistical software program SPSS. Answers from open-ended questions were coded and analyzed for themes.

One finding that emerged from this study is that all of the schools surveyed agreed that elements of the Mercy charism were present in their schools. All school mean scores for charism were above  $M=4$  (as calculated from questions using a 5-point Likert scale). Mean scores for charism for individual schools ranged from  $M=4.152$  (School F) to  $M=4.711$  (School G). Factor analysis revealed that the three strongest elements of charism as identified by survey participants

were a sense of spirituality in the school community, a concern for poor persons and/or women, and education.

Respondents from each of the schools surveyed indicated that their school offered some type of professional development related to charism, although responses were inconsistent in many cases regarding the number of days. The frequency, format, duration, and facilitators of these events varied by school, and varied by year in some cases. Respondents described various topics covered in both induction programming and other professional development. The content and resources used varied by school, and varied by year.

### **Discussion**

The format and frequency of charism-related professional development at the schools in this study shows some of the characteristics of effective professional development identified in the literature. The one-day workshop model of professional development is not as effective as efforts that occur over time and include follow-up for teachers (Darling-Hammond et al., 2013). Survey respondents described various professional development formats (use of faculty meetings, discussions) that could fit into an effective model if they included follow-up as recommended by Learning Forward (2011). The majority of respondents to the follow-up survey indicated that their school had one or two charism-related professional development days in the 2014-2015 school year. The open-ended responses indicated that in many schools, charism-related professional development was woven into other meetings or experiences throughout the year as well. Participants also indicated that a presentation by a guest speaker would be one of their preferred formats for professional development related to charism, even though this format is not as effective as other types of job-embedded professional development (Darling-Hammond et al., 2009). Multiple schools used mentoring as part of their induction programming, described

as effective by McBride (2013), and some schools included small groups or professional learning communities as part of the induction process, recommended as effective by Dufour and Marzano (2011). Continued spiritual development, or formation, of staff members in Catholic schools should include ongoing experiences for prayer and self-reflection (Rogus & Wildenhaus, 2000). Retreats represent a way in which those experiences can happen, and retreats can also strengthen culture by focusing on charism (Shields, 2008). Some schools described concerted efforts to integrate content from a retreat at the beginning of the year into meetings or events throughout the school year, which aligns with recommendations for effective professional development (NSDC, 2011).

Effective professional development is supported by effective leadership and strong school culture (NSDC, 2011). Survey respondents indicated that in a majority of schools, administrators were responsible for planning and facilitating induction programming and other professional development. Campus ministers were also identified as important to the planning and implementation of charism-related professional development. Job-embedded or site-specific professional development is also more effective than professional development designed with no consideration for a particular school site's issues (Croft et al., 2010). Respondents in this study described using some resources for charism-related professional development provided by the Network for Mercy Education or a regional sponsoring community, but the experiences were designed and facilitated for the most part by leaders at individual school sites.

One of the goals of this study was to explore how staff members at Mercy-sponsored secondary schools understand Mercy charism. Charism can be used to identify how a particular group or organization with the Catholic Church is different than another (Cook & Simonds, 2011). Respondents indicated a belief in the presence of Mercy charism in their particular

schools. The factors of spirituality in the school environment, education, concern for persons who are poor, and concern for women correlate with values expressed by Catherine McAuley (Sullivan, 2012) and the Sisters of Mercy (1992).

One observation regarding the data collected in this study is the inconsistency in answers at times from respondents at the same school. Some of this (for example, does your school have a retreat?) may have been a result of the way questions on the survey instruments were interpreted. Some participants in other instances described various ways that language of charism was used in specific ways, but other participants at the same school indicated that they did not agree that charism was present. Central and enduring elements of culture are those which are important to an organization and emphasized consistently over time (Albert & Whetten, 1985; Whetten, 2006). Survey responses at some schools indicated that Mercy charism is a central and enduring element of organizational culture at these schools. Results from others schools indicated that a subgroup of members of the organization identified strongly with those elements, but others did not. This indicates that the place of charism in the culture of these particular schools is different. Organizational culture, according to Schein (2010), has three layers: artifacts, espoused beliefs, and underlying beliefs. Respondents gave examples of elements of charism present in various artifacts (bookmarks, prayer books, hung mission statements, values listed in course syllabi), and espoused beliefs (comments of principals and presidents, for example). Charism will be part of all three of these layers in an organization with a strong culture. Some survey responses indicated a disconnect between what participants saw and heard regarding charism, and what they believed about their school culture. This could indicate that language about charism is present in artifacts and espoused beliefs, but underlying beliefs in the

organization do not focus on charism. Does the language about charism stand in opposition to school culture or support and reinforce it?

Stories are a way for organizations to build and maintain a sense of culture (Bolman & Deal, 2008; Denning, 2005). Just as pronouncements from Vatican II called for greater participation in the life of the church for the laity, they also urged religious orders to examine their own communal life in the church. This “adaptation and renewal of the religious life includes both the constant return to the sources of all Christian life and to the original spirit of the institutes and their adaptation to the changed conditions of our time” (Paul VI, 1965c, para. 2). This examination included a focus on the “founders’ spirit and special aims” (Paul VI, 1965c, para. 2) of these orders. The Sisters of Mercy reconsidered the personal story of Catherine McAuley as well as her motivations and intentions for action (Bonnarens & Rocklage, 2014). Her story is a way to engage people into a sense of concern for people who are poor and inspire them to action. The story of Catherine McAuley and the Sisters of Mercy in the United States has also emerged as an area of emphasis for Mercy schools to maintain a sense of culture in the changing reality of declining numbers of sisters present in schools and the reconfiguration of sponsorship of these schools. Bolman and Deal (2008) noted that stories “establish and perpetuate tradition...[and] convey an organization’s values and identity to insiders” (p. 261). What stories do Mercy schools tell to illustrate their identity as Catholic Mercy-sponsored schools? A 2010 initiative from the Network for Mercy Education entitled “Who Will Tell the Story” celebrated “the journey to founding the Sisters of Mercy and focus[ed] on how Mercy lives on in those who live and tell the story now and into the future, especially in Mercy education” (Network for Mercy Education, 2010, “Who Will Tell the Story,” para. 1). The

creation of the Mercy Education System provides an opportunity for this sense of culture to be considered as policies and structures for the System are created.

Just as there are different ideas about the intersection of identity and culture in organizations in general, there are various ideas about the layers of identity for Catholic order-sponsored institutions. Charism is what distinguishes one particular group within the Church from another, but how does that identity relate to a school's identity as a Catholic institution? A Mercy-sponsored school, for example, is a Catholic school just as parochial schools are. Morey and Piderit (2008) argued that universities that have too much of an emphasis on congregational identity can undermine a sense of "vibrant Catholic institutional identity" ("Congregational Versus Catholic Identity," para. 1). These kinds of conversations in higher education suggest that high schools likewise cannot focus solely on the charism of their founding order as a source of identity without paying attention to both the Catholic nature of that charism and the school's Catholic identity. Charism provides a lens for understanding how one's faith might be lived in the world, not an alternate system of belief.

### **Recommendations for Mercy Schools**

The results of this study indicate that Mercy charism is part of the culture of the schools in this study, and various professional development opportunities support an increase in understanding of charism and integration of elements of charism into daily work. Results from this study also indicate that this happens to varying degrees among the different schools in the study. The following are recommendations for Mercy secondary educators and administrators:

**Consistent expectations related to professional development.** Leaders in the Mercy Education System should consider creation of consistent expectations for schools related to charism-related professional development, as well as methods to monitor and evaluate charism-

related professional development at schools within the System as well as organizational efforts. Data from this study showed that while all of the schools identified with elements of Mercy charism, the strength of that identification was different. The ways in which charism was conveyed to staff members also varied among these schools. Although professional development is more effective in the context of a school community (Zepeda, 2013), schools need a framework to assess and evaluate their professional development efforts (NSDC, 2011). The movement of Mercy schools to a single sponsoring entity, the Mercy Education System of the Americas, provides an opportunity to create such a framework. Such a framework can help to create coherence between school goals and organizational efforts, leading to more successful professional development (Garet et al., 2001). It can also help to ensure that staff members at all Mercy-sponsored schools have access to similar experiences and programming. Large-group identity is affected by the views of self-identity of individuals within a system (Ashforth et al., 2008). Leadership of the Mercy Education System should consider organizational programming for all new staff members, not just persons on the boards of trustees or certain administrators. A consistent framework can help to achieve this participation, moving from a culture of encouragement to one of expectation. This will pose additional logistical challenges to work through, such as travel and differing schedules for schools in various parts of the Americas. These efforts, however, would help to strengthen a sense of organizational identity as a group of Mercy schools.

Defining consistent expectations can also help to shape certain elements of induction or professional development, such as mentoring for new staff members. While logistics might be handled differently at schools of different sizes or in various locations, system-wide expectations could help to outline roles and anticipated outcomes for mentoring of new staff members.

**Consistent expectations related to charism.** Leaders in the Mercy Education System should consider creation of system-wide expectations related to charism for administrators and schools, as well as methods to monitor and evaluate administrators' leadership as related to charism. How do schools demonstrate their understanding of charism? How do students and parents understand their school's identity as a Catholic, Mercy-sponsored school? School leaders should also continue to discuss the relationship between Mercy charism and Catholic identity and how that is expressed in their particular schools. Again, collaboration among schools is important. As the Mercy Education System forms, it will be essential to consider how that System will provide support to allow for such collaboration. That support can help to increase a sense of institutional identity that is tied to charism (Ferrera, 2000; Fisher, 2003; Lynch, 2011).

**Resources in various formats.** Leaders in the Mercy Education System should commit to the creation and sharing of charism-related resources in a variety of formats. Although participants in this study preferred face-to-face methods of professional development for efforts related to charism, materials in various formats can support that work. It is also important to consider updating those resources on a regular basis. For example, participants at several schools mentioned using resources such as the video "Circle of Mercy" which was released in 1994, years before the students currently in these schools were born.

**Collaboration among Mercy schools.** Survey respondents valued being able to collaborate with staff members from other Mercy schools either face-to-face or virtually. Geographic spread can present a challenge to the relationship between organizations and their sponsoring communities (Hultman & Hultman, 2015; Wittberg, 2013). The decreasing numbers of Sisters of Mercy present in Mercy-sponsored secondary schools as well as the condensation of

leadership structures means that leadership teams within the Sisters of Mercy or the Mercy Education System may be located further away geographically from schools than earlier Community Leadership teams. Planners of the Mercy Secondary Education Conference (currently a committee part of the Network for Mercy Education) should continue to commit to having the annual conference in different geographical regions to facilitate attendance of staff members from as many schools as possible.

The development of standards also provides additional opportunities for sharing. Projects or development efforts that are effective and help schools to reach certain standards can be shared with other schools in the system to help increase consistency. A culture of collaboration is linked to greater transfer of skills from professional development (Drago-Severson, 2012). Current Mercy organizations emphasize collaboration. Continuing to encourage this collaboration and support it with appropriate structures and resources could lead to more successful professional development opportunities related to charism as well.

**Consistency with charism.** Mercy administrators should make decisions consistent with the Mercy charism and use the language of Mercy charism to describe things that are happening in the school. Although leaders are not the only ones responsible for developing an organization's climate or culture, they do play an important role. Leaders help to embed culture in an organization through their choices about allocation of resources, their reactions to critical events, their selection and coaching of personnel, and their focus of attention (Schein, 2010). The work of leaders can create consistency between the organization's stated values and underlying beliefs. Well-organized and well-designed programs will seem like lip service if the overall organizational culture contradicts or undermines them. The literature shows that it is possible for leaders in Catholic schools to help transmit charism (Hardiman, 2005; Rentner,

2010), but those leaders need support in those efforts. Development of and support for leaders of Mercy schools can help to ensure that they are making decisions which embed a Mercy culture in their schools, and create a Catholic Mercy identity that is central, enduring, and distinctive (Whetten, 2006).

**Charism in the curriculum.** Mercy administrators and educators should consider a systematic examination of school curriculum for charism-related concepts, and subsequently systematic integration of those concepts throughout the curriculum. Sharing of materials or curriculum structures should be organized in a systematic way through the Mercy Education System. Respondents to the follow up survey indicated that professional development related to Mercy charism was not as helpful in integrating elements of Mercy charism into daily work as staff retreats. Efforts to systematically integrate charism into the curriculum may help to strengthen a sense in teachers that development in charism is related to and helpful for their jobs.

### **Recommendations for Charism-Related Professional Development**

Although this study focused on Mercy-sponsored secondary schools, recommendations regarding charism-related professional development may be helpful to other order-sponsored schools interested in strengthening their sense of charism, or other diocesan Catholic schools interested in strengthening their sense of Catholic identity. Based on findings in the literature and in this study, the researcher makes the following proposal for professional development related to charism:

**Practices related to new staff induction.** Induction for new teachers and staff members to a school should be multi-year and multi-faceted, following recommendations made in the literature for effective professional development (NSDC, 2011) or socialization, orientation, and training programs (Feldman & O'Neill, 2014). It should include an initial orientation experience

containing an introduction to the school's charism and mission. If these beliefs are truly central, enduring, and distinctive (Whetten, 2006), that should be reflected in the artifacts and espoused beliefs (Schein, 2010) presented in an individual's first experiences with the organization.

Respondents reported that their induction experiences covered a wide range of topics.

Organizers and facilitators should consider making resources available in some format (hard copy or electronic) for later review to avoid information overload. Rather than walking through various procedures and policies, an initial experience could let participants know where those can be found, and then review understanding of various procedures and policies on later dates. Technology increases the possibility of doing this in a systematic way, perhaps through the use of an electronic course management system already in use for teachers and students.

**Mentoring as part of induction processes.** Induction should include mentoring. Schools may determine if one mentor could work with a new teacher in areas of effective teaching as well as awareness of charism, or if separate mentors are needed for these two areas. Mentoring is not the only key responsible for a new staff member's success or failure at a new school (Waterman & He, 2011), but can be a helpful component of a systematic program. Organizational culture is connected to this as well. Organizations with stronger cultures are more likely to have more systematic programs for induction (Feldman & O'Neill, 2014). Individuals' beliefs and perceptions help to shape organizational culture. This can create a cyclical reality in which beliefs strengthen organizational culture, which develops strong practices to introduce individuals to the culture. Those practices shape beliefs and perceptions, which continue to reinforce the culture. Mentors can help new individuals to an organization navigate the rites, rituals, and stories of an organization. Qualifications for mentors may differ from organization to organization, and these groups will need to determine how to prepare

individuals for that role and support them through the induction process as they work with new staff members.

**Retreat.** Professional development for all staff should include a retreat experience. The Catholic identity of a school depends upon the staff members of that school (CCE, 1997). The expression of this may be different in various communities, but staff members at Catholic schools should be engaging in dialogue about what it means to be teaching in a Catholic school rather than assuming that the Catholic aspect of education in that school is the responsibility of staff members in certain departments. Retreats should be designed with time for self-reflection, and be themed around some element of the school's charism.

The movement in Catholic schools from primarily leadership by vowed religious persons to primarily lay persons has created new needs for formation of those leaders (CCE, 1982; Cook & Engel, 2006). Formation, or an individual's growth in terms of faith, is an important consideration for staff members in Catholic schools. Formation can strengthen identity and further a sense of mission (Mayotte, 2013). Retreat opportunities provide space for self-reflection and community building, and can help to build on individuals' strengths. Teachers may come to Catholic schools from preparation programs that did not include a focus on spiritual development or talking about teaching with the language of vocation. Formation opportunities in a Catholic school can help a teacher's beliefs about work align with the school's mission (Shields, 2008), and supporting that growth in teachers can in turn help to support that in students (Weissbourd, 2003). Prioritization of moments for prayer and reflection show that this is an important aspect of the school's identity and culture.

**Ongoing professional development.** Ongoing professional development should occur throughout a school year based on the study group model of professional development. The

structure provided by these groups can be helpful for educators (Leaman, 2005). A school community may decide to use existing PLC groups for these additional discussions if they are functioning well, but may wish to create new groups integrating non-teaching staff members in a meaningful way. Charism-based resources should be available in a variety of formats.

Again, this is another area in which the culture of a school and professional development efforts are related. The study group or PLC model is more effective when it is part of a collaborative culture with strong leadership (Buttram & Farley-Ripple, 2016; Carpenter, 2015; Shorter, 2012). A collaborative culture supports these efforts, and these efforts in turn support the sustaining of such a culture.

### **Future Research**

The evidence in this study suggests that Mercy charism is present in the cultures of the 10 schools that were part of this study, and that efforts to help staff members deepen their understanding of Mercy charism exist at each school. Future research could expand the populations studied to include students, board members, or parents. Is the understanding of the presence of charism in these groups different than it is among staff members at these schools?

Further study could help to explain some of the conflicting data seen in the results of this study. Possibilities for qualitative study include examination of artifacts related to professional development, observation of professional development meetings and in-depth interviews with staff members at Mercy schools about their experiences with charism-related professional development. Further study also needs to be done regarding the content of charism-related professional development, including examining the materials used for such professional development and assessing their effectiveness. This work would help to illuminate and explore the underlying culture at each of these schools. How is the charism-related professional

development that is offered reflective of the overall culture of the school? Are there certain types of culture or styles of leadership that are more conducive to successful charism-related professional development? The results of this study indicate that there is not a simple and direct relationship between the identification of charism in a school with the professional development that is offered. This suggests that other factors matter as well. Responses from survey participants spoke to other aspects of school culture such as leadership or espoused values. How do these aspects of culture support or detract from the strength of charism identification in a school? If a school's culture and identity are strong, does that school need different professional development than one that does not have such a strong culture?

This study examined the frequency and format of charism-related professional development. Further research is needed regarding the relationships between frequency, format, and content of professional development. If a school has a presentation from a guest speaker, what is being presented? If you have a small group discussion, what are people discussing? What resources are schools using, and do schools using the same format and resources for professional development get different results? How are resources from larger Mercy organizations (Network for Mercy Education, for example) utilized?

Further research could also explore how particular elements named in the surveys in this study are seen in particular schools. For example, survey respondents indicated that the schools in this survey include elements of Catherine McAuley's story and issues related to women in the curriculum. Further research could analyze how those elements are present in both the written and taught curricula of these schools. Further research could also examine the relationship between efforts specifically designed to strengthen charism, and those to strengthen Catholic identity in general.

Finally, future research could explore what it means to be a teacher in a Catholic school. What is the relationship between theological knowledge and praxis, content knowledge, and pedagogical knowledge? Is it possible that similar models exploring the intersection of some of these areas (Koehler & Mishra, 2009) could be repurposed to consider the relationship between content, pedagogy, and theological belief and practice?

### **Final Comments**

Catherine McAuley founded her first House of Mercy in 1800s Ireland as a laywoman. In her lifetime, the Sisters of Mercy became a religious order working in education in Ireland and other parts of the world. Sisters in this order started schools in the United States that flourished under their direction and with their staffing and leadership. Today, these schools are staffed primarily by laypersons interested in the mission of Mercy – similar to when Catherine began her work. New leadership structures are emerging to support Mercy schools into the future. Professional development of staff members in those schools is an important vehicle through which the Mercy story can be told, and the values of Mercy schools can be conveyed. This study examined how staff members at different Mercy-sponsored secondary schools understand charism, and described the types of charism-related professional development offered at their schools. The results of this study showed that these order-sponsored schools identified the presence of their sponsoring order's charism in their buildings. They also indicated that professional development and induction programming help staff members integrate elements of that charism into their daily work. The overall culture of a particular school also plays a role in the transmission of charism.

The story of transition in the order founded by Catherine McAuley is similar to that of many other religious orders within the Catholic Church. The types of situations to which these

groups initially responded, and to which they continue to respond, still exist. Faith still needs to be proclaimed. Poor people still need food and shelter. Children still need education. The world still hungers for justice. The charisms of these different orders help to shape how they address these needs.

The formation and professional development of staff members in Catholic schools is going to continue to be important as future teachers and administrators in Catholic schools will probably not have had the experience of being educated by religious priests, brothers, or sisters. If maintaining Catholic identity and a sense of charism are important to Catholic schools, professional development will be an important vehicle for helping to make that happen. This study shows how professional development contributes to the sustaining of charism in a group of Catholic schools. The proposed framework provides a model for individual schools or groups of schools to use when making decisions about the formation and professional development work in their schools. Schools have limited time and resources, but a significant responsibility for helping to educate and form their students. An effective program of formation and professional development can shape the lives of staff members, which will in turn affect the education and the lives of their students.

A deep and integral part of the Mercy story is how the message of the Gospel resonated in Catherine McAuley and moved her to action in her world. This work reflects how that story continues to unfold in Mercy schools today, and provides direction for shaping the story of Mercy schools in the future.

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**Appendix A –Letter to Network Principals**

Dear Mercy Administrators,

My name is Alison Kline-Kator, and I am a Religious Studies teacher at Mercy High School in Farmington Hills, Michigan. I am also a doctoral student in the College of Education, Health, and Human Services at the University of Michigan-Dearborn. As part of my doctoral research, I am examining how transmission of the Mercy charism is facilitated among your staff members through staff development. I would like to survey staff members at Mercy secondary schools in the United States to learn more about staff development at Mercy schools. It is my hope that this research will lead to suggestions for staff development that can be used at your schools.

The survey will be administered online in mid-September, and should take individuals around 15 minutes to complete. I will provide the link to the survey via e-mail. In order for me to complete this survey, I would like your permission to contact staff members at your school via e-mail. Responses to individual surveys will remain confidential.

If you are interested in allowing your staff members to participate in this research, please indicate your consent by e-mailing me at [klineam@umich.edu](mailto:klineam@umich.edu). If you have questions, you can contact me via e-mail, or reach me by telephone at [248-476-8020 x1560](tel:248-476-8020).

Thank you,  
Alison Kline-Kator

## Appendix B –Survey Questions

### Mercy Charism and Staff Development

Q Dear Mercy Staff Member, My name is Alison Kline-Kator, and I am a Religious Studies teacher at Mercy High School in Farmington Hills, Michigan. I am also a doctoral student in the College of Education, Health, and Human Services at the University of Michigan-Dearborn. Administrators at your school have given me permission to contact you regarding my research. I am examining how transmission of the Mercy charism is facilitated by staff development at your school. I am asking you to complete a brief survey to assist in my research. The survey will be completed online, and your answers will remain confidential. The survey should take about 15 minutes to complete, and will involve answering brief questions. Demographic questions at the end of the survey will ask about your time of service at your school, and your current position. Your individual responses will not be tied to your name. You will have the option of including contact information if you would like to see the overall survey results. Your participation can help to benefit Mercy secondary schools. Thank you in advance for your participation and help. Thank you, Alison Kline-Kator

Q Are you 18 years of age or older?

- Yes (1)
- No (2)

If No Is Selected, Then Skip To End of Survey

Q Did you participate in any staff orientation activities when you began working at your school?

- Yes (1)
- No (2)

If No Is Selected, Then Skip To Have you participated in professional...

Q Describe the organization or format of the staff orientation activities.

Q Describe the content or topics covered in the staff orientation activities.

Q My staff orientation at this school helped me understand Mercy charism.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q Have you participated in professional development at your school related to Mercy charism? (See the definition of charism below.) "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" (Dominican Sisters of St. Cecelia).

- Yes (1)
- No (2)

If No Is Selected, Then Skip To

Please answer the...

Q Describe the organization or format of professional development at your school related to Mercy charism.

Q Describe the topics or content covered in the professional development related to Mercy charism.

Q Professional development at this school has helped me understand elements of Mercy charism.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Please answer the following questions based on your experience at your Mercy-sponsored school.

Q The school attempts to provide educational opportunities to women from all socio-economic areas of society.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The school provides education about social issues affecting women.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The school integrates the study of issues affecting women in academic disciplines across the curriculum.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The school provides students with opportunities for service to poor women and children in the community.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The school collaborates with other Mercy educational organizations and associations.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The spiritual development of students is seen as the responsibility of all those who work within the school.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The school's curriculum provides education about Catherine McAuley and the Mercy charism.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The school provides daily prayer rooted in the charism.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The school has a hospitable climate that displays a reverence and dignity for each individual.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The school culture provides an environment for students to become persons of faith and to develop their own personal spirituality.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q The school staff models the values of the Mercy charism in the day to day life of the school.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Please answer the following questions.

Q What position do you hold at this school?

- Faculty/Teacher (1)
- Administrator (2)
- Staff Member (3)
- Other (4) \_\_\_\_\_

Q How many years have you worked at this school (including this current school year)?

- 1-5 years (1)
- 6-10 years (2)
- 11-15 years (3)
- 16-20 years (4)
- 21-25 years (5)
- 26-30 years (6)
- 31-35 years (7)
- 36-40 years (8)
- 41 years or more (9)

Q Are you a graduate of a Mercy secondary school, a Religious Sister of Mercy, a Mercy Associate, or a Mercy Companion?

- Yes (1)
- No (2)

Q Are you responsible for planning or facilitating staff orientation activities or professional development at your school?

- Yes (1)
- No (2)

If No Is Selected, Then Skip To Would you be interested in possibly p...

Q What are your responsibilities in regards to planning or facilitating of staff orientation activities or professional development at your school?

Q Would you be interested in possibly participating in a one-time interview (approximately 30-60 minutes) regarding your experiences with staff orientation or professional development at your school?

- Yes (1)
- No (2)

If No Is Selected, Then Skip To Do you wish to receive the results of...

Q Please enter your e-mail address so that you can be contacted regarding an interview.

Q Do you wish to receive the results of this study, or have any additional comments? Please use this space for comments and include your e-mail address if you are interested in study results.

### Appendix C – Follow-Up Survey Questions

#### Mercy Charism and Staff Development Follow-Up

My name is Alison Kline-Kator, and I am a Religious Studies teacher at Mercy High School in Farmington Hills, Michigan. I am also a doctoral student in the College of Education, Health, and Human Services at the University of Michigan-Dearborn. Last fall, staff members at your school participated in a survey for my research, which is related to how transmission of the Mercy charism is facilitated by staff development at your school. Thank you for your help and insight. I am asking you to answer additional questions based on results from my original survey. The survey will be completed online, and your answers will remain confidential. The survey should take about 10 minutes to complete, and will involve answering brief closed-ended questions. You should be 18 years or older to complete the survey. Your individual responses will not be tied to your name, but data will be tied to your school. You will have the option of including contact information if you would like to see the overall survey results later this spring. You may withdraw from this study at any time by closing your web browser to end the survey. You may also choose to skip any question you do not wish to answer. Your participation can help to benefit Mercy secondary schools. Thank you in advance for your participation and help.

Q I confirm that I am 18 years of age or older.

- Yes (1)
- No (2)

If No Is Selected, Then Skip To End of Survey

Q What position do you hold at this school?

- Faculty/Teaching (1)
- Staff/Non-Teaching (2)
- Administration (3)
- Other (4) \_\_\_\_\_

Q Did you complete my first survey "Mercy Charism and Staff Development" in October/November 2015?

- Yes, I completed the survey either partially or fully (1)
- No (2)
- I do not recall (3)

The following questions ask about professional development at your school during the 2014-2015 and 2015-2016 school years. Answer the following questions to the best of your knowledge:

Q Who plans induction programming (programs for new staff members) at your school?

(Check all that apply.)

- Administrators (1)
- Campus Ministers (2)
- Teachers at the School (3)
- Outside Persons (4)
- Sisters of Mercy (5)
- Not Sure (6)
- Other (7) \_\_\_\_\_

Q Who facilitates induction programming at your school? (Check all that apply.)

- Administrators (1)
- Campus Ministers (2)
- Teachers at the School (3)
- Outside Persons (4)
- Sisters of Mercy (5)
- Not Sure (6)
- Other (7) \_\_\_\_\_

Q Who plans professional development related to Mercy charism at your school?

- Administrators (1)
- Campus Ministers (2)
- Teachers at the School (3)
- Outside Persons (4)
- Sisters of Mercy (5)
- Not Sure (6)
- Other (7) \_\_\_\_\_

Q Who facilitates professional development related to Mercy charism at your school?

- Administrators (1)
- Campus Ministers (2)
- Teachers at the School (3)
- Outside Persons (4)
- Sisters of Mercy (5)
- Not Sure (6)
- Other (7) \_\_\_\_\_

Q What was the frequency of professional development related to Mercy charism at your school in preparation for or during the 2014-2015 school year?

- 0 days/instances (1)
- 1-2 days/instances (2)
- 3-4 days/instances (3)
- 5-6 days/instances (4)
- 7-8 days/instances (5)
- 9-10 days/instances (6)
- 11 or more days/instances (7)
- Not sure (8)
- I was not at my school during the 2014-2015 school year (9)

Q Does your school have a yearly retreat for staff members?

- Yes (1)
- No (2)

If No Is Selected, Then Skip To End of Block

Q Staff retreats help me understand Mercy charism.

- Strongly disagree (1)
- Disagree (2)
- Neither agree nor disagree (3)
- Agree (4)
- Strongly agree (5)

Q Staff retreats help me to integrate Mercy charism into my daily work.

- Strongly disagree (1)
- Disagree (2)
- Neither agree nor disagree (3)
- Agree (4)
- Strongly agree (5)

Q Professional development related to Mercy charism has helped me integrate elements of the Mercy charism into my daily work.

- Strongly disagree (1)
- Disagree (2)
- Neither agree nor disagree (3)
- Agree (4)
- Strongly agree (5)

Q What types of professional development activities do you think would be most helpful in building knowledge of Mercy charism at your school? (Rank these items in order of preference, with 1 being your first choice, 2 being your second choice, etc. You do not need to rank all items.)

- \_\_\_\_\_ A presentation from a guest speaker (1)
- \_\_\_\_\_ A presentation from someone at my school (2)
- \_\_\_\_\_ A small group conversation (3)
- \_\_\_\_\_ Completing an online course at a self-set pace (4)
- \_\_\_\_\_ Having a mentor from my school (5)
- \_\_\_\_\_ Having a mentor from another Mercy school (6)
- \_\_\_\_\_ Meeting virtually with staff members from other Mercy schools (7)
- \_\_\_\_\_ Meeting face-to-face with staff members from other Mercy schools (8)
- \_\_\_\_\_ Other (9)

Q What types of professional development activities do you think would be most helpful in incorporating Mercy charism into work at your school?(Rank these items in order of preference, with 1 being your first choice, 2 being your second choice, etc. You do not need to rank all items.)

- \_\_\_\_\_ A presentation from a guest speaker (1)
- \_\_\_\_\_ A presentation from someone at my school (2)
- \_\_\_\_\_ A small group conversation (3)
- \_\_\_\_\_ Completing an online course at a self-set pace (4)
- \_\_\_\_\_ Having a mentor from my school (5)
- \_\_\_\_\_ Having a mentor from another Mercy school (6)
- \_\_\_\_\_ Meeting virtually with staff members from other Mercy schools (7)
- \_\_\_\_\_ Meeting face-to-face with staff members from other Mercy schools (8)
- \_\_\_\_\_ Other (9)

Q Do you identify yourself as Catholic?

- Yes (1)
- No (2)
- I prefer not to say (3)

Q What is your age?

- 18-25 (1)
- 26-30 (2)
- 31-35 (3)
- 36-40 (4)
- 41-45 (5)
- 46-50 (6)
- 51-55 (7)
- 56-60 (8)
- 61-65 (9)
- 66 or older (10)
- I prefer not to say (11)

Q Do you wish to receive the results of this study? Please use this space to include your e-mail address if you are interested in study results. Results will be shared later this spring.