

THE ROLE OF THE PRINCIPAL IN MAINTAINING THE SPECIAL CHARACTER OF A RELIGIOUS ORDER SCHOOL.

A REPORT ON FINDINGS DURING SABBATICAL LEAVE, TERM 3, 2007.

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PURPOSE

Catholic schools in New Zealand fall into two groups, diocesan schools and religious order schools. Diocesan schools are under the proprietorship of the Roman Catholic Bishop of the Diocese. Religious order schools are under the proprietorship of the specific religious order e.g. Marist, Mercy, Sacre Coeur, but are also under the authority of the Roman Catholic Bishop of the Diocese in which they are situated.

In New Zealand, Catholic Secondary Schools are integrated into the state system. As State Integrated schools, each school has an elected Board of Trustees responsible for the governance of the school. The Board of Trustees also has four Proprietor's representatives appointed by the Proprietor to ensure that the Special Character of the school is maintained. The Principal is responsible for the management of the school, but is also a member of the Board of Trustees. The Integration Agreement defines the Special Character of a Catholic school as follows:

"The school is a Roman Catholic school in which the whole school community, through the general school programme and in its religious education and observances, exercises the right to live and teach the values of Jesus Christ. These values are as expressed in the Scriptures and in the practices, worship and doctrine of the Roman Catholic Church, as determined from time to time by the Roman Catholic Bishop of the Diocese".

Religious order schools maintain this Special Character, but with the added dimension of the charism of the religious order permeating, deepening and strengthening the Special Character.

Vatican Council II (1963-1966) required that the role of the Laity in the Church be reviewed and that religious orders re-examine their origins and purpose, to help them to review their roles in the modern world. As a result of this re-evaluation of their vision and roles within communities, coupled with fewer people joining religious orders, the number of religious in schools has diminished considerably.

INTRODUCTION

In my position, as the first lay principal of a Catholic Mercy College, I have become increasingly aware of the role of the principal in maintaining the Mercy charism of the

college. When I was appointed I had a Masters in Educational Leadership from the Australian Catholic University. I had previously gained a Graduate Diploma in Religious Education. Studying for these qualifications had enabled me to review where I was as a Catholic educator and how I could best serve Catholic education. Most of my teaching career had been spent in Catholic schools in England and New Zealand, but none of these schools articulated a charism other than they were Roman Catholic. My own education, in England, had been in diocesan schools led by the Sisters of Mercy and then the Faithful Companions of Jesus. Neither of these schools promoted their charism. They were first and foremost Roman Catholic schools based on the Gospel teachings of Jesus.

When I applied for the principal's position I was aware, from the material in the application pack, that the Mercy charism was important in this school. I began to research the founding of the Sisters of Mercy and found material which enabled me to relate to the founder, Catherine McAuley, as a real person and to see her vision for the education of girls. The support and guidance of the Congregation of the Sisters of Mercy, as I took on the role of the first lay principal, was invaluable.

The Sisters of Mercy have been redefining their role world wide. In Ireland, USA, UK, Australia and New Zealand, the congregations have been re-visiting their origins and uniting as one organisation in each country, under the umbrella of Mercy International Association. I have become increasingly aware that relationships between order schools and the congregations are changing, as numbers within the orders are falling. Therefore the support that was available to me is unlikely to be available to the next lay principal.

The role of the New Zealand State School Principal has become increasingly complex. In a State Integrated School, the principal also has overall responsibility for the special character that defines that school. This is an added layer of responsibility for the principal. In a State Integrated School with a religious order as the Proprietor, the principal has to work with that religious order to ensure that the charism is maintained. As the religious orders diminish how are lay principals going to be able to maintain that charism?

I wanted to find out what training and assistance lay principals received which would assist them to articulate the charism in their religious order schools.

METHOD

In Term 1 a questionnaire was prepared and sent to all principals of Catholic Secondary Schools in New Zealand. At the end of Term 2 the questionnaire was also sent to all members of the Australasian Association of Mercy Secondary Schools.

FINDINGS: PART ONE - New Zealand

Twenty one questionnaires, 46%, were completed and returned from New Zealand Catholic Secondary Schools. The responses included eleven schools who had the Bishop of the Diocese as their proprietor and ten schools who had the founding religious order as the proprietor.

Three colleges have a religious as principal, the remaining respondees were all lay principals. Of the sixteen lay principals, seven were the first lay principals in their

school. These seven had been principals from between seven and twenty years in their current school. Three of these principals are in Diocesan schools, and four are in religious order schools.

One school has had five lay principals, two have had four, five have had three and two have had two. Seven of these schools are diocesan and three are religious order schools. One of these diocesan schools has been under the proprietorship of the Bishop of the Diocese since it was founded, but with a religious order invited to set up the school on behalf of the diocese. The school continues to operate under the charism of that religious order.

Another of these diocesan schools was founded from the amalgamation of two single sex religious order schools, under the proprietorship of the Bishop of the Diocese. Since its amalgamation, the charism of the religious orders of the previous single sex schools had not been promoted. Recently, the charism of a different religious order has been adopted by this school.

Eight schools reported that they had one or more members of the religious order as staff in fulltime or part-time positions. Some of these staff were in teaching positions, others in ancillary positions. Two schools indicated that they would be losing their religious staff at the end of 2007. Currently religious in schools, including the Principal, accounts for 2% of the staff of the nineteen schools. In 2008 this will drop to 1.6 % in the nineteen schools.

Principals were asked this question:

“As the Principal what do you perceive to be your role in promoting the charism of the religious order as part of the Special Character of the school?”

Without exception, each Principal saw this as a vital part of their role. Comments included:

- *Making sure that it is communicated at every opportunity*
- *It is a vital part of my job description to promote it and to see that it remains active*
- *Ensuring that the founding order charism is a living part of the structure of the College and that the expectations from this are kept in front of staff, students and Board of Trustees*
- *I must role model this*
- *A vital role, I lead this*
- *Fundamental first element in my job description*
- *Focus the language, metaphors and symbols to the language, metaphors and symbols of the order*
- *The principal has had to define it because of the combination of the two religious orders*
- *If I do not tell the stories, who will?*

These responses indicate the acceptance of the Principals as being a vital part of their role to promote the charism that defines the Special Character of each school.

Principal's roles are outlined in their job descriptions. It is an expectation that each principal, as for all New Zealand principals, will have an annual appraisal. This

process varies from school to school, but it is the responsibility of the Board of Trustees to ensure that the principal's appraisal takes place. A good appraisal system can support the principal in all aspects of their role. Goals are set annually with the principal and funding set aside to assist with necessary professional development from the operations grant. This is the requirement of the Ministry of Education for all New Zealand Principals. How then are principals supported and appraised in their role of maintaining the charism of the Special Character?

Principals were asked:

"How is this aspect of your role as Principal appraised and by whom?"

A variety of responses were made. Two principals indicated that it was not appraised, one stated that it was informal. Nine principals responded that it was included in the Board of Trustees appraisal process. Two principals were appraised by their Provincial, one by the Catholic Education Office and two principals saw their appraisal as part of the external Catholic Review. One principal reported that staff, students, trustees and Parish Priest were part of the appraisal. Apart from the two principals appraised by their Provincial, there was no reference to members of the religious orders involved, or being consulted, in the appraisal process.

The next question asked:

"What provision is made to provide funding for training in the Special Character of the school by the religious order and what other support are you given to assist you in your role as principal?"

Eleven schools responded that they received no funding for training for the principal, or staff, from the religious order. Of these three were religious order schools, the remainder diocesan schools. Two diocesan schools reported that one of their founding orders maintains regular contact and supplies documentation and from time to time a visiting person. Eight schools reported that they received some funding for professional development of principal and staff. Two religious orders were identified as providing ongoing support and funding to attend their courses for principals and staff through formal networks that the orders had built up between Australia and New Zealand. A third order was identified as being willing to assist with reasonable requests for funding to attend courses and conferences.

A variety of other support was identified:

- sending documentation and literature to the schools
- access to a network of like-minded schools
- three schools had a member of the order as a Proprietor's representative on their Board of Trustees
- some orders were able to provide personnel to facilitate occasional staff meetings on charism
- two orders have had a designated member to work with their schools for one year to assist with charism and staff development
- weekly visit at a morning tea
- members of the order supporting school functions
- letters and notes of support from members of the order to the principal
- some orders have a prayer network with members having certain schools to pray for.

Currently first time principals, in all New Zealand schools, participate in a Ministry of Education funded training course which takes place over a two year period. This course has been specially designed to meet the needs of a newly appointed state school principal and includes personnel and financial management, property, legal requirements, reporting etc. Of the principals who responded to the questionnaire, seven have been appointed since the commencement of this programme and have participated in it. In informal discussions with several of these principals they have each stated how valuable the programme was in helping them in their role.

As identified earlier in this report, principals of New Zealand Catholic Secondary Schools see their role as leader of the charism of the special character of the school that they lead as being vital.

The next question that principals were asked was:

“What preparation and on going training has been available to them in the Special Character of their school?”

Prior to taking up the position of principal four people had been, or still were, a member of a religious community. Seven people had no training and received no induction, but one of these indicated that they had attended a school of the same charism. One person was taking papers towards a Masters degree through ACU. On appointment one person attended a one week course with the order, another was given three induction sessions with a member of the order. One person spent some time with the outgoing principal and received assistance from the local Catholic Education Office. Two principals considered that on the job training had been obtained in senior management roles in the school prior to being permanently appointed. Another principal was given a prayer service of induction and publications on the religious order, this person was also a former pupil of the school.

Ongoing training in the Special Character of the school is also wide ranging:

- Two principals perceive the annual NAPCSS conference to be their source of ongoing training. One of these principals is from a diocesan school, the other from a religious order school.
- Two principals have ongoing formation in religious life and with other schools of the order.
- Two principals view continuing on the job experience as their training.
- Two other principals have identified Catholic Education Office courses as their source of training.
- Two religious orders have set up formal networks, between Australia and New Zealand, to provide regular training opportunities for principals and senior staff.
- Another proprietor offers support and encouragement to their principals to attend biennial conferences in Australia.

When asked:

“In what form and how often does this training take place?”

Responses indicate that a lot of the responsibility falls back onto the principal to initiate and follow-through training opportunities:

- Principal undertakes training annually either through a founding religious order or CEO.
- No formal training process. Continuing review and renewal through Special Character Committee and Special Character Reviews.
- The order has provided training once. Principal runs annual charism training for staff.
- Annually through CEO and through National Catholic Principals' Conference.
- Overseas conferences every 2 years.
- 4-5 forums/events per year organised by the religious order.
- No real pattern.
- Order established an Education Services agency to assist principals and staff.
- Principal has given the training.

These responses indicate that there is a wide variation in the preparation and ongoing training in the charism and Special Character of each school for the principal and staff. Conferences and/or courses between the religious order schools of the same charism would appear to be the main source of on going training for principals in those schools. The principal having the responsibility for initiating any professional development in the specific charism for the staff.

FINDINGS PART 2: Australia

Since I am a principal of a Mercy school, I was specifically interested in the training provided for Mercy principals. I was able to access the network of Mercy schools in Australia and New Zealand and I sent the questionnaire to each principal who was a member of the Australasian Association of Mercy Secondary Schools network.

As in New Zealand, Australian principals took their role in leading the charism very seriously:

- *“I think that I play a leading role in modelling Mercy values, telling the Mercy story, in-servicing staff in Mercy, inducting new staff into the Mercy ethos, forming active relationships with the Sisters in the congregation, asking teaching applicants and parents seeking enrolment what they know about the Mercy charism, speaking about the Mercy story at assemblies, joining the Mercy congregation for their celebrations, continuing to educate myself about current research in Mercy.”*
- *“A vital part of my role. Staff, students and parents must be educated as to the charism of the foundress and the ongoing spirit of the Sisters of Mercy. The charism gives a special flavour to our school. A great sense of belonging to a community that is linked to other communities and other ministries throughout the world.”*
- *“My role is to join other staff in looking for ways to keep the spirit of Catherine McAuley alive ‘Today, not tomorrow’”.*
- *“This school has a proud tradition going back to its foundation many years ago. If I do not tell the stories, who will?”*

Of the 21% responses returned, the training and support were very similar to the New Zealand principals' responses. Generally there was no direct financial support from the order to assist with training principals or staff. However principals in Victoria seemed to have a more formalised induction process and training options through Mercy Secondary Education Inc.

Australian schools do not have the same requirements for annual principal appraisal as New Zealand schools have. Most reported that if there was appraisal in Special Character it was part of a three, or five year general programme operated by the Catholic Education Office and was not in the Mercy charism. Some appraisals were through the Congregational Council.

Several of the responses were from schools which had been founded by the Sisters of Mercy, or by the amalgamation of a Mercy school and a school of another religious order and were now systemic schools. In each case the current principal saw the value of articulating the Mercy charism and took the responsibility for promoting it within the school. Each principal, who responded to the questionnaire, identified the biennial conference of the Australasian Mercy Secondary Schools Association as invaluable in providing the main source of support and training in the Mercy charism.

WHAT DO THE RESPONSES TELL US ABOUT MAINTAINING THE CHARISM OF THE FOUNDING RELIGIOUS ORDERS IN OUR SECONDARY SCHOOLS?

A partnership has to exist between the principal and the founding religious order/orders to enable the charism to continue. The Diocesan /Systemic schools which continue to associate with a charism do so for one of the following reasons:

1. The religious order has continued to maintain a strong link with the school through the principal and assists with training programmes.
2. The principal has made a concerted effort to develop the charism of the founding religious order to enable it to be meaningful to the school community.
3. The principal has led a newly blended school, which has had to deal with blending the traditions of two schools, and charisms of two or more religious orders, to form a meaningful and living charism which reflects the founding orders, but which is also meaningful to the new school.
4. The principal has inherited a blended school where the charisms of the founding orders have been lost. Value is seen in having a defined charism to underpin the special character of the school, as well as a charism which can support the development of the principal and staff. A different religious order is approached to link into its networks.
5. A new secondary school is developed with a lay principal and no religious order input. The principal can see value in developing the Special Character along a particular charism and after consultation, this link is set in place.

CONCLUSION

In a study conducted in the USA by Holtschneider and Morey in 2000, to look at the changing relationships between Catholic Colleges and Universities and their founding Religious Congregations, a number of points emerged:

1. As congregations became smaller their sponsorship of the colleges and universities were changing. Sponsorship was identified as being a relationship that congregations have with their institutions. This sponsorship being expressed in three ways:
 - the influence of members of the congregation present in the institution
 - through the congregation's structural and governance role
 - through the co-mingling of resources
2. The charism of the order is continued by witness and teaching. Lay witness depends on the formation and spiritual leaning of lay staff. Without the guidance of the religious order, the formation and spiritual development of the lay staff will lean away from the founding charism.
3. Holtschneider and Morey perceive that the charism of the religious order will end after the first generation of lay people to follow on after the last existing member of the religious order has deceased. This will result in the religious order colleges and universities in the USA becoming universally Catholic.

Without exception, the lay principals surveyed, perceived that the promotion of the charism of the religious order was one of their most important roles as a principal. These principals saw the charism as providing a purpose and value in today's world as well as being the heritage of the school. In most cases the lay principal was provided with little or no support from the founding religious order/s, but has had to research and interpret the charism as best they can. Some principals are struggling to do this and realistically balance the other aspects of the principal's role. While we have to acknowledge that many religious orders have very few members, their members have a wealth of knowledge which can still be transferred.

With schools who have a religious order as their Proprietor, a partnership is also required between the principal and the religious order. The religious order has to take a clear responsibility to support the principal by providing induction and ongoing training in the charism of the order. The Marist and De Lasalle orders have each established training programmes for educating principals and senior teachers in the Marist and De Lasalle education philosophies. The Victorian Mercy's through Mercy Secondary Education Inc also have a programme in place. Principals who have participated in these programmes reported have valuable they are. These are models that religious orders need to consider establishing, to enable lay principals to have induction and ongoing training in the specific charism, if the conclusions from the Holtschneider and Morey report are to be prevented.

Grace, 2003, commented "*The success of the Catholic school leadership appears highly influenced by the cultural and spiritual capital that a principal brings to the school*". This statement is certainly supported by the comments made by principals in the survey. As identified by **all** of the principals who participated in this survey, their role in promoting the charism of the Special Character of the school is the most vital part of their principalship. Lay principals cannot imbibe the whole charism of the order, as we cannot be totally immersed in it, but we do need a formative programme to assist us to lead our schools if the particular charisms are to survive.

Based on the research that I have undertaken I would make the following recommendations: Religious orders should:

1. Articulate clearly their expectations of the lay principal in articulating the charism, in consultation with the current principals and Boards of the schools. This would create clarity for the future.
2. Work with their current principals to establish an induction programme in the charism of the religious order for future lay principals.
3. Establish a liaison person/group, from the order with responsibility for promotion of the charism in education. This should include providing opportunities for principal and staff formation in the charism and a visit to each school annually.
4. Liaise with the Marist and De La Salle orders to look at their programmes and then to develop a formative programme for educators in the specific charism.
5. Where possible, set in place a funding programme which will enable the formation needs of principals and senior staff, in the charism of the religious order, to be met.

Religious orders who founded schools did so because education was part of the philosophy of their founder. Most of their schools are now led by lay people. The roles of many religious orders are moving into different pathways away from schools. However the role of schools in the education of nations cannot be overlooked. Schools are the biggest agent for social and moral change in any country. If the charisms are to continue and not fall into the immediate decline predicted by Holtschneider and Morey, religious orders need to accept the responsibility for ensuring that the principals, who lead the schools founded by their order, are fully supported in their mission.

References:

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Mary COOK, September 2007