The educational leadership experiences of principals and their respective leadership teams in the implementation of a Josephite approach to education in six schools in the Josephite tradition

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The University of Notre Dame Australia
THE EDUCATIONAL LEADERSHIP EXPERIENCES OF PRINCIPALS AND THEIR RESPECTIVE LEADERSHIP TEAMS IN THE IMPLEMENTATION OF A JOSEPHITE APPROACH TO EDUCATION IN SIX SCHOOLS IN THE JOSEPHITE TRADITION

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Master of Education
Bachelor of Education

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Statement of Sources

To the best of the candidate’s knowledge, this thesis contains no material previously published by another person, except where due acknowledgement has been made.

This thesis is the candidate’s own work and contains no material which has been accepted for the award of any other degree or diploma in any institution.

Signed………………………………… Date………………………………..
Acknowledgments

I wish to express my appreciation to the six Principals and their respective leadership teams who participated in this research. Their commitment to a Josephite approach to education was clearly evident in their words, actions and leadership practice. I hope this research has given voice to their experiences of the Josephite tradition and its approach to education. My appreciation is extended to the four Sisters of St Joseph who provided their experience, wisdom and insight to this study. I would also like to acknowledge Australian government funding under the RTP scheme received to support this thesis.

I am grateful to my supervisors, Associate Professor Shane Lavery and Associate Professor Dianne Chambers, for their skillful supervision. Shane and Dianne’s encouragement, insight, knowledge, guidance, extraordinary patience and generosity given to this study have been immeasurable. I would also like to acknowledge the staff at The University of Notre Dame School of Education, Fremantle Campus for their skill, insight, professional expertise and generosity of time.

I am indebted to my Josephite companions, siblings, friends and colleagues for their interest, pertinent questions and conversations that have encouraged and inspired me during this study. I thank all those Josephite women whose legacy of Josephite education has enabled the voice of Principals and leadership team participants to be heard in this liminal time in society and the Catholic Church. Furthermore, I owe a debt of gratitude to my Josephite sisters for the gift of time and space to undertake this study.

I dedicate this journey of learning to the memory of my parents, Shana and John Mead, my first educators in faith, hope and love. Their love, generosity, patience and capacity to nurture the integration of life, faith, culture and learning is an enduring legacy.
Abstract

The focus of this research was an exploration of the experiences of Principals and their respective leadership teams in implementing a Josephite approach to education in six schools in the Josephite tradition. In a liminal time characterised by a secularised, pluralistic and a de-traditionalising culture in society and Church (Gowdie, 2017; Green, 2018, Pollefeyt & Bouwens, 2010), Principals and key leaders in schools in the Josephite tradition are challenged to re-contextualise the Josephite tradition to best serve their school communities. It is therefore timely to undertake this research in order to inform the Sisters of St Joseph and relevant governing bodies of their role and responsibility in nurturing leadership in a Josephite approach to education. Furthermore, the study gives voice to the Principals and leadership team members in regard to their experiences.

The review of literature highlighted four themes which formed the conceptual framework in this research. The four themes are: The Josephite Heritage; Leadership in Catholic Education; Catholic Social Justice Principals; and Educational leadership. The interplay among these four themes directly influence the subject central to the research, that of educational leadership in the Josephite tradition.

The epistemological approach of this research was that of constructivism. An interpretive paradigm with a filter of symbolic interactionism was used to explore the experiences of Principals and their respective leadership teams in the implementation of a Josephite approach to education. The chosen methodology for the study was an instrumental case study design of six schools in the Josephite tradition. Methods of data collection included in-depth, semi-structured interviews of six Principals and their respective leadership teams in regional and metropolitan schools. Five of the schools were in South Australia and one school in Victoria. Additionally, a focus group of Sisters of St Joseph provided a reference to affirm, clarify or critique the data collected from each Principal and their respective leadership team. Miles, Huberman and Saldana’s (2014) interactive model of data management was used for data displays, management and analysis.

The research indicated that Principals and leadership team members viewed the founding story as a timeless source of inspiration which influenced their leadership behaviours in carrying out mission in the challenging landscape of society and the Catholic Church. Principals and leadership team members identified the unifying power of symbols, language and rituals when they were re-imagined in the
local circumstances of the school community. Principals who integrated the Josephite spiritual tradition in their personal and professional stance demonstrated service to the community and therefore a non-hierarchical style of leadership. Furthermore, Principals and their leadership team members who committed to ongoing formation demonstrated integrity and the vitality of the Josephite tradition in their leadership practice.

The results indicated that Principals and leadership team members who effectively blended transactional, transformational and transcendental leadership processes nurtured an inclusive learning community marked by creativity, excellence and compassion, attributes critical to a Josephite approach to education. Finally, the research indicated that when Principals were able to integrate the Josephite spiritual tradition with their leadership practice, they demonstrated strong elements of transcendental leadership. The integration of the Josephite spiritual tradition in leadership enabled coherency of mission, vision and clarity in the creation of inclusive faith and learning communities.
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Chapter 1

The Research Defined

1.1 Educational Leadership in the Josephite Tradition

The Congregation of the Sisters of St Joseph of the Sacred Heart is a religious institute dedicated to working with and educating children and young people from families living in poverty. The Congregation was founded in 1866 at Penola in South Australia by Father Julian E Tenison Woods and Mary Mackillop (Saint Mary of the Cross MacKillop) who “saw a need to respond to the ‘misery and wretchedness’ of the ‘bush children’ and the ‘afflicted poor’” (Constitutions Sisters of St Joseph of the Sacred Heart, 2007, p. 5). The Josephite tradition has stemmed from the legacy of Mary MacKillop, educator and social reformer, and her companions as the humble origin of a bush school grew into a network of Josephite schools across Australia and New Zealand. The tradition has grown from the spirit of Mary MacKillop “who believed that God was active in her life and in the lives of her early companions and was calling them to the service of others” (Constitutions Sisters of St Joseph of the Sacred Heart, 2007, p. 8). The Josephite approach to Catholic Education was central in the establishment of the first system of Catholic Education in South Australia in 1866, when Fr Julian Tenison Woods was appointed as the first General Director of Catholic Education in Adelaide (Foale, 1989; Press, 2004).

The Josephite tradition in education has evolved in response to changes in Australian and New Zealand society and the cultural context of school communities. Since the 1990s leadership of schools in the Josephite tradition has progressively transitioned from the Sisters of St Joseph to lay colleagues. As of 2013 all schools in the Josephite tradition have been led by lay Principals. During this time of transition, the Sisters in South Australia have contributed to the formation of leaders of schools in the Josephite tradition. Hence the Josephite tradition has been able to lend continuity and continued direction to educational leadership in a Josephite approach to education.

The context in which a Josephite approach to education now takes place is considered as a liminal time for the Catholic Church, religious congregations and society in general (Gowdie, 2017; Green, 2018). This liminal time places the
Catholic Church in a “de-traditionalising and pluralising culture” (Pollefeyt & Bouwens, 2010, p. 193) of which Catholic school communities are part (D’Orsa & D’Orsa, 2013; Green, 2018; Sharkey, 2015). Furthermore, the fragility of the Catholic church is reflected in, amongst other factors, the sexual abuse crisis and subsequent loss of moral authority. In this time of uncertainty, the educational mission undertaken by the Catholic Church faces a possible “crisis of meaning and therefore a crisis of purpose” (Green, 2018, p. 13). However, according to D’Orsa and D’Orsa (2015), Green (2018) and Gowdie (2017), religious spiritual traditions are a rich source of wisdom, authority, intuition and vision that can bring meaning and purpose in re-contextualising the gospel for new times.

In is within this complex backdrop that Principals of diocesan and congregational schools in the Josephite tradition are called to create meaning in leading school communities in the integration of life, faith, culture and learning (D’Orsa & D’Orsa, 2010; NCEC, 2017; Sharkey, 2015). Principals can draw on the Josephite spiritual tradition to create a shared vision, to transcend the ordinary and to form inclusive faith and learning communities (Cardona, 2000; Lavery, 2012; Nsaih & Walker, 2013). However, there is also a risk that spiritual traditions can dissipate or be diluted if there is a lack of theological understanding of the founding story, its spirituality, shared symbols and rituals when implementing an approach to education (Dutton & Kahler, 2017; Green, 2018). In addressing this risk, researchers and scholars identify an urgent need for formation in faith leadership capabilities in changing social and cultural contexts (Belmonte & Cranston, 2009; Neidhart, Lamb & Spry, 2012; Neidhart & Lamb, 2016). In this time of liminality, the Sisters of St Joseph and governing bodies have a role and responsibility to nurture the integrity of purpose and vision in a Josephite approach to education. This study aims to explore the characteristics of a Josephite approach to education that are identified and implemented by Principals and their leadership teams in schools conducted in the Josephite tradition.

1.2 Personal Statement

There were three catalysts underpinning the motivation for this research. Firstly, I am a Sister of St Joseph with more than thirty years’ experience in the ministry of Catholic education. Secondly, the Canonisation of Saint Mary of the Cross (MacKillop) and the sesquicentenary of Josephite education acted as a catalyst
for exploring a Josephite approach to education in the 21st Century. Thirdly, the
growing interest in the Catholic identity of schools in a liminal time in the Catholic
Church and its educational mission served as an impetus to explore how leaders of
schools identified the characteristics of the Josephite tradition.

As a Sister of St Joseph and educator I have served in Josephite schools in
South Australia for more than thirty years in regional and metropolitan, diocesan and
Congregational schools. I was a Principal for seventeen years in two regional
diocesan Reception – Year 12 schools in the Josephite tradition. Being the last Sister
of St Joseph to serve as Principal in South Australia was a catalyst for considering
my own personal and professional commitment in furthering the legacy of Josephite
education. While I recognised that several Principals appointed to Josephite schools
had a close affiliation with the Sisters of St Joseph, other Principals appointed had
neither an affiliation with the Sisters nor had served in a Josephite school. This
change in leadership raised the question of how the legacy, integrity and vitality of
the Josephite tradition was now understood and implemented in a Josephite approach
to education. In particular, it appears that the next generation of Principals and
leaders appointed to schools in the Josephite tradition may have limited formation in
a Josephite approach to education prior to a leadership appointment.

The Canonisation of Saint Mary of the Cross (MacKillop) in 2010 and the
sesquicentenary of education in the Josephite tradition in 2016 were catalysts in
motivating me to explore the distinctive nature of a Josephite approach in education.
While the story of Mary MacKillop and Father Julian Tenison Woods has been well
documented, there appeared to be a paucity of research on a Josephite approach to
education per se. Furthermore, it was apparent when liaising with the Association of
Josephite Affiliated Secondary Schools (AJASS) and a network of leaders in South
Australia, that Principals of schools in the Josephite tradition were concerned about
the integrity and ongoing formation of leaders of schools in the Josephite tradition
into the future.

Lastly, the emerging interest in the Catholic identity of schools in a liminal
time in a globalised, secularised and pluralistic community gave rise to my curiosity
as to how educational leadership could best serve the legacy and integrity of the
Josephite tradition. For example, the Enhancing Catholic Identity of Schools
(ECIS) Project in South Australia aimed to research the re-contextualisation of
Catholic identity, based on dialogue with plurality and a symbolic understanding of
religion (Pollefeyt & Bouwens, 2010). This research project raised questions for me as to ways Principals and key leaders re-contextualised the gospel through the lens of the Josephite tradition in the implementation of a Josephite approach to education. My personal experience coupled with the context of Josephite education were compelling motives to explore the vitality and integrity of a Josephite approach to education in the current circumstances.

1.3 Purpose of the research

The purpose of this research is to explore the characteristics of a Josephite approach to education that are identified and implemented by Principals and their leadership teams in schools conducted in the Josephite tradition. Underpinning this purpose is to develop an understanding of the approach by which leadership is exercised by Principals and their leadership teams and how the characteristics inherent in Josephite education are evident in leadership practice. The research seeks to investigate those ways in which characteristics of Josephite education are implemented by Principals and their leadership teams in six schools: five schools in regional and metropolitan South Australia and one school in Victoria.

1.4 Context

Context allows the researcher to examine the ‘big picture’ and to holistically look at the setting of the study (Marshall & Rossman, 2011). This study included six participating schools identifying with the Josephite spiritual tradition along with a focus group of the Sisters of St Joseph. The description below introduces the three dimensions that form the specific aspects of the context of this research study:

1. Schools conducted in the Josephite tradition in Australia
2. The six schools participating in the research, namely, the five primary and combined schools in South Australia and a secondary school in Victoria.
3. The Sisters of St Joseph of the Sacred Heart

The first dimension of the context entails more than 400 diocesan schools, including two Congregational schools that originated in the Josephite tradition in Australia. Catholic schools founded in the Josephite tradition are usually diocesan schools governed by local Advisory School Boards. The vast majority of schools in the Josephite tradition are primary schools serving in low socio-economic
communities in rural and urban areas. Combined schools comprise both primary and secondary students and are usually located in regional areas. Secondary schools cater to students from Years 8-Year 12 in South Australia and Years 7-Year 12 in Victorian schools. Secondary schools are generally located in metropolitan areas.

Primary, combined and secondary schools in the Josephite tradition provide accessible and affordable Catholic education in communities across Australia. In more recent times schools have been established in the name of Mary MacKillop, adopting her charism as the school’s spiritual foundation.

In South Australia, one of the two states of Australia where this study was based, diocesan schools are governed under the auspices of the South Australian Commission for Catholic Education (SACCS). In the second state, Victoria, diocesan schools are governed under the auspices of the diocesan canonical authority. The Sisters of St Joseph have two Congregational schools, one in South Australia and another in Victoria which are governed by the Trustees of the Sisters of Saint Joseph. Table 1.1 illustrates the number and types of schools conducted in the Josephite tradition that are in the Adelaide Archdiocese, Melbourne Archdiocese and Port Pirie Diocese.

Table 1.1
Number and Types of Schools Conducted in the Josephite Tradition in South Australia and Victoria

<table>
<thead>
<tr>
<th>School type</th>
<th>Adelaide Archdiocese</th>
<th>Port Pirie Diocese</th>
<th>Melbourne Archdiocese</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reception –Year 7</td>
<td>17</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Reception-Year 12</td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Years 8- Year 12</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Years 7- Year 12</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Prep.-Year 6</td>
<td></td>
<td></td>
<td>20</td>
</tr>
</tbody>
</table>

The second dimension of the context is the six schools founded in the Josephite tradition that were purposefully selected to provide a broad representation of Josephite schools, as the instrumental case for this study. Initially, the study proposed to focus solely on schools in the Josephite tradition in South Australia, but
a perceived power differential resulted in the need to include the Congregational school in Melbourne, Victoria. The researcher is a Director on the Congregational Mary MacKillop College Kensington Board in South Australia and as such it was deemed inappropriate to include the College in this study. The types of school participating in the instrumental case study represent primary, combined and secondary schools. Five of the schools are co-educational and one is an all-girls school. Two of the schools are in metropolitan Adelaide, one school is in metropolitan Victoria and three schools are in regional South Australia. Five of the schools are diocesan schools governed under the auspices of the South Australian Commission for Catholic Schools (SACCS). The sixth school in Victoria is a Congregational school and is governed by the Trustees of the Sisters of St Joseph. The key features of the six schools in the instrumental case study are outlined in Table 1.2. The schools represent variation in the type, size, location and governance of schools in the Josephite tradition. The features of the six schools include the percentage of students with Aboriginal and Torres Strait Islander (ATSI) heritage and English as an additional language (EAL). The Index of Community Social-Educational Advantage (ICSEA) value is an indicator of the situation in which education takes place in each school community.

<table>
<thead>
<tr>
<th>School</th>
<th>One</th>
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<th>Three</th>
<th>Fourth</th>
<th>Fifth</th>
<th>Sixth</th>
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<tr>
<td>Foundation</td>
<td>1874</td>
<td>1871</td>
<td>1870</td>
<td>1964</td>
<td>1880</td>
<td>1964</td>
</tr>
<tr>
<td>Location</td>
<td>Regional SA</td>
<td>Regional SA</td>
<td>Metro SA</td>
<td>Metro SA</td>
<td>Regional SA</td>
<td>Metro Victoria</td>
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<tr>
<td>Student enrolment</td>
<td>706</td>
<td>456</td>
<td>517</td>
<td>222</td>
<td>85</td>
<td>927</td>
</tr>
<tr>
<td>EAL</td>
<td>1%</td>
<td>3%</td>
<td>11%</td>
<td>78%</td>
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<td>26%</td>
</tr>
<tr>
<td>AITSI</td>
<td>1%</td>
<td>8%</td>
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<tr>
<td>ICSEA</td>
<td>1041</td>
<td>1008</td>
<td>1053</td>
<td>1000</td>
<td>1062</td>
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<td>Governance</td>
<td>SACCS</td>
<td>SACCS</td>
<td>SACCS</td>
<td>SACCS</td>
<td>SACCS</td>
<td>Trustee of Sisters of St Joseph</td>
</tr>
<tr>
<td>Type</td>
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<td>Combined</td>
<td>Primary</td>
<td>Primary</td>
<td>Primary</td>
<td>Secondary</td>
</tr>
</tbody>
</table>
The third dimension of the research is the Sisters of St Joseph of the Sacred Heart, a Religious Congregation of Sisters and affiliates ministering across Australia, New Zealand, Timor Leste, Ireland and Peru. The work of Education has predominantly been the focus of ministry for the Sisters of St Joseph of the Sacred Heart (Foale, 2016). The Sisters have ministered as Principals in diocesan schools across Australia and New Zealand since their foundation. The Congregation of the Sisters of St Joseph originally governed four all girls’ Colleges in Australia and currently now sponsor two Congregational schools in Australia. The transition from the Sisters of St Joseph as Principals to lay leadership of diocesan schools in South Australia was undertaken strategically to ensure the leaders of schools had a sound formation in the Josephite tradition. The Sisters of St Joseph and their affiliates continue to be active in the ministry of education as chaplains, consultants, Directors, mentors, teachers, counsellors, members of School Boards and as members of school advisory committees. Some Sisters are involved in educational work in diocesan systems, tertiary institutions and parish communities.

1.5 Identification of the research question

The overarching research question is twofold. Firstly, what do Principals and their leadership teams understand by the concept of a Josephite approach to education? Secondly, in what ways do Principals and their leadership teams implement a Josephite approach to education in the context of the school community in which they serve? There are three specific questions to be researched. These are:

1. What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics of the Josephite tradition in their respective school community?

2. What do Principals and their leadership teams, in schools conducted in the Josephite tradition identify as the characteristics underlying a Josephite approach to leadership in the context of the school community in which they serve?

3. In what ways are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their leadership teams?

1.6 Significance of the Research

The significance of this study in exploring a Josephite approach to education
is threefold. Firstly, the research has the potential to form a body of knowledge to advise the Congregation of the Sisters of St Joseph of ways in which the legacy, integrity and vitality of the Josephite tradition can further God’s mission through Catholic education. In particular, the research findings may have the capacity to inform the Trustees of the Sisters of St Joseph on the selection, appointment and formation of Board Directors, leaders and staff in Congregational schools.

Secondly, the study has the potential to inform governing bodies such as National Catholic Education Commission (NCEC), South Australian Catholic Commission for Catholic Schools (SACCS) of the contribution spiritual traditions have in enacting the mission of God through Catholic education. Specifically, the study has the potential to inform Catholic Education South Australia (CESA) in the recruitment, selection, appointment and formation of Principals and leaders in schools conducted in the Josephite tradition.

Thirdly, the results of the study have the potential to assist current and future Principals in identifying the Josephite tradition in the implementation of a Josephite approach to education. Furthermore, the results may strengthen Principals and their leadership teams in collectively carrying out mission in a Josephite approach to education in a de-traditionalising and pluralising society of which they are part.

1.7 Research Participants

The research participants in this study fall into three categories namely: Principals of the six schools; the respective leadership team members in each school; and a core group of Sisters of St Joseph. Table 1.3 provides a summary of Principals as research participants, their gender, the type of school for which each is responsible, as well as the location of the school.

Table 1.3

<table>
<thead>
<tr>
<th>School</th>
<th>Principal</th>
<th>Type</th>
<th>Enrolment</th>
<th>Location</th>
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<td>1</td>
<td>Female</td>
<td>Reception - Yr.12</td>
<td>706</td>
<td>Regional</td>
</tr>
<tr>
<td>2</td>
<td>Female</td>
<td>Reception - Yr.12</td>
<td>456</td>
<td>Regional</td>
</tr>
<tr>
<td>3</td>
<td>Female</td>
<td>Reception-Yr.7</td>
<td>517</td>
<td>Metropolitan</td>
</tr>
<tr>
<td>4</td>
<td>Male</td>
<td>Reception-Yr.7</td>
<td>222</td>
<td>Metropolitan</td>
</tr>
</tbody>
</table>
The composition of each Leadership Team was determined by the respective Principal. The Leadership Team Participants in each school are outlined in Table 1.4 identifying the specific roles held by each participant.

Table 1.4  

**Leadership Team Participants**

<table>
<thead>
<tr>
<th>School</th>
<th>Roles held by Leadership team participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Deputy Principal, Religious Education Coordinator, Business Manager, Director of Teaching and Learning.</td>
</tr>
<tr>
<td>2</td>
<td>Deputy Principal, Director of Student Wellbeing, Director of Middle Years, Director of Senior Years, Administration Coordinator, Inclusive Learning Coordinator.</td>
</tr>
<tr>
<td>3</td>
<td>Deputy Principal, Assistant Principal Religious Identity and Mission, Director of Early Years Learning.</td>
</tr>
<tr>
<td>4</td>
<td>Assistant Principal Religious Identity and Mission, English Additional Language Key Teacher, Religious Education Coordinator, Curriculum. Special Education Coordinator, Chaplain.</td>
</tr>
<tr>
<td>5</td>
<td>Religious Education Coordinator, Bursar, Key teacher.</td>
</tr>
<tr>
<td>6</td>
<td>Director of Catholic Identity, Business Manager, Deputy Principal Wellbeing, Deputy Principal Teaching and Learning, Director of Students, Coordinator Inclusive Learning.</td>
</tr>
</tbody>
</table>

The Sisters of St Joseph focus group was comprised of four Sisters with extensive experience as educators in a Josephite approach to education. These four Sisters are all former Principals of primary, secondary and combined diocesan and Congregational Josephite schools in South Australia.

### 1.8 Outline of the Design of the Research

The epistemological approach of this research is constructivist in nature. This constructivist research used interpretivism, with a filter of symbolic interactionism as a theoretical perspective. The chosen methodology was an instrumental case study approach. This methodology was chosen because an
instrumental case study examines a case in order to gain insight into a phenomenon (Cohen, Manion, & Morrison, 2011). Specifically, the instrumental case study explored the characteristics of a Josephite approach to education that are identified and implemented by Principals and their leadership teams in six schools conducted in the Josephite tradition.

Data collection methods included the use of semi-structured one-to-one interviews, focus group interviews, a document search, researcher generated field notes and a reflection journal. The data were managed and analysed using Miles and Huberman’s interactive model (Miles & Huberman, 1994). This model consists of three main components: data reduction; data display; and drawing and verifying conclusions. Interview guides (Appendix C, D & G) were used as the basis for the interviews. The interviews were recorded, and the transcriptions were made available to the participants as a process of member-checking. The document search analysed a variety of school publications and correspondence. Researcher generated field notes were written during and after the interviews offering additional information to participants’ responses. A journal noting the researcher’s perspective was kept during the research and the subsequent report writing to monitor and guard against any potentially biased perceptions. Data was displayed and analysed under three sections, namely: characteristics of the tradition identified by Principals and leadership team participants; characteristics of the Josephite tradition underlying a Josephite approach to leadership; characteristics of the Josephite tradition evident in the leadership practices of Principals and their leadership teams.

1.9 Limitations of the Research

There were two potential limitations identified and addressed in this research. The first limitation was the sample size of six schools. Five schools were chosen from a total of twenty-eight schools conducted in the Josephite tradition in South Australia. Additionally, one Congregational school was selected for the research from Victoria. However, the six schools have been purposefully chosen because the schools are a broad representation of schools conducted in the Josephite tradition. The researcher is attempting to use maximum variation sampling as three schools are in regional South Australia, two schools in metropolitan South Australia and one Congregational school in Melbourne, Victoria. Furthermore, the schools chosen for this study represent primary, secondary and combined schools, along with co-
educational and girls only education. This strategy for purposeful sampling aims at capturing and describing the central themes that cut across participant variation (Patton, 2015).

The second limitation is concerned with potential researcher bias. The researcher is a Sister of St Joseph and a past Principal of two of the six schools in the study. The researcher’s own emotional response and passion could create bias if self-awareness and reflection on data were not undertaken. Researcher bias was addressed in two ways. A reflective journal was kept throughout the study to remind the researcher to be self-aware of, and guard against, projecting her own perspective. Member checking of all transcripts was undertaken to enable an accurate account of the research interviews where all interviewees were provided with a copy of the interview for verification. In addition, the potential for bias was mitigated by the length of time that has passed since the researcher was Principal. The Researcher’s appointment as Principal concluded in one school in 1999 and the other school in 2012.

1.10 Definitions

1.10.1 Archdiocese and diocese.

The Archdiocese is a Church canonical structure of governance, usually a geographic location under the leadership of the Archbishop of the Diocese. A Diocese is a Church canonical structure of governance, usually a geographic area under the leadership of the Bishop of the Diocese (Australian Catholic Bishops Conference, 2018).

1.10.2 Catholic school principals.

Catholic school Principals are appointed to the ministry of school leadership which is one of service to young people and their families. As Catholic school leaders, they are required to nurture and enhance a Catholic ethos within the school and provide support and direction to their school communities. In Diocesan schools, Catholic school Principals are employed by the Archbishop or Bishop of the diocese. In this research, diocesan Catholic school Principals are accountable to the Director of Catholic Education in South Australia and/ or the Director of Catholic Education Port Pirie Diocese for the pastoral and professional responsibility in developing the school as a Catholic community. Principals of Congregational schools are employed
by the Trustees of the Sisters of St Joseph of the Sacred Heart.

1.10.3 Charism.

The word charism comes from the Greek word for ‘gift’ or ‘favour’ typically defined as gifts of the Spirit of God. Spiritual gifts become charisms when they are used for the sake of others. Charism is expressed by a person or a group and is a spiritual affinity that gives a sense of common vocation and mission (Catholic Church, 2008).

1.10.4 Combined schools.

Combined schools referred to in this study are schools in regional South Australia enrolling students from Reception through to Year 12. All students are accommodated on the one campus.

1.10.5 Congregation.

The term Congregation is used for a type of religious institute in the Catholic Church. The Sisters of St Joseph of the Sacred Heart is a religious Congregation of pontifical right dedicated to apostolic work (Constitutions Sisters of St Joseph of Sacred Heart, 2007)

1.10.6 Index of community social-educational advantage.

The Index of Community Social-Educational Advantage value is provided for each school based on parents’ occupation, and education, school geographical location and proportion of Indigenous students. The average ICSEA value is 1000. The higher the ICSEA value, the higher the level of educational advantage. The lower the ICSEA values, the lower level of educational advantage (Australian Curriculum Assessment and Reporting Authority, 2016).

1.10.7 Leadership Teams.

In this study, the term ‘leadership team’ refers to those staff members who hold an executive role in the school or hold a position of responsibility. Leadership team members include Deputy Principal/s, Assistant Principal for Religious Identity and Mission (APRIM), Business Manager, Director/s of Student Wellbeing and Learning, Chaplain, key teachers. These people are responsible for the development
of culture and implementation of policies and procedures. In addition, leadership team members hold positions of responsibility for administration, teaching and learning and student wellbeing.

1.10.8 Liminal time.

The term liminality has been employed by the Catholic cultural anthropologist Gerald Arbuckle to describe a range of ‘threshold experiences’ that accompany cultural change. In a liminal phase, a culture feels both attracted by the security of the past and a call to face the future. Liminal times contain catalysts for important new developments and meanings in a culture (D'Orsa & D'Orsa, 2013, p. 20).

1.10.9 Metropolitan.

A metropolitan area is a city and its surrounding suburbs and entails a large urban area (The Australian Bureau of Statistics, 2018). In this study metropolitan schools are located within the city of Adelaide and Melbourne.

1.10.10 Mission.

The word mission comes from the Latin word ‘mittere’ meaning ‘to send’ (D’Orsa & D’Orsa, 2010). Mission equates with purpose. In Christian communities ‘mission’ has to do with purpose understood as the continuance of Jesus’ mission in the world. God’s mission (Missio Dei) expressed in and through the ministry of Catholic education has a distinct purpose, asking questions of “purpose and meaning” in the light of faith (D’Orsa & D’Orsa, 2010, p.18).

1.10.11 National Catholic Education Commission (NCEC).

The National Catholic Education Commission, established by the Australian Catholic Bishops Conference for Catholic Education, maintains liaison with the Commonwealth Government and other key National bodies. NCEC complements at the National level the work of the State and Territory Catholic Education Commissions.

1.10.12 Primary schooling.

Within this study primary schooling in South Australia refers to students enrolled in Reception through to Year 7. In Victoria, primary schooling refers to students enrolled in Pre-Primary through to Year 6.
1.10.13 Reception and pre-primary.
Reception is the term used to refer to the first year of formal schooling in South Australia. Students enrol in February or July at the age of 5 years. Pre-Primary is the first year of schooling in Victoria at the age of 5 years.

1.10.14 Re-contextualisation.
Re-contextualisation refers to the construction of identity in a pluralistic setting (Pollefeyt & Bouwens, 2010). In this study, re-contextualisation is defined as the re-interpretation of the gospels and Catholic faith in a contemporary cultural context.

1.10.15 South Australian Commission for Catholic Schools (SACCS).
The South Australian Commission for Catholic Schools (SACCS) has oversight of education in all Catholic schools in South Australia and sets directions, allocates resources and develops policies.

1.10.16 Secondary schooling.
Within this study, Secondary schooling in South Australia refers to students enrolled in Years 8-12. These students are usually aged between 13-18 years. In Victoria, Secondary schooling refers to students aged between 12-18 years enrolled in Years 7-12.

1.10.17 Regional.
In Australia all the towns, small cities and areas that lie beyond the major capital cities such as Sydney, Melbourne, Brisbane, Perth, Adelaide, Darwin and Canberra are referred to as Regional areas (ABS, 2018).

1.11 Outline of the Thesis
The structure of the thesis consists of six chapters. Table 1.5 provides an overview of this structure.
1.12 Chapter outlines

Chapter One: The Research Defined introduces the research. It sets out a brief introduction to the research background, identification of the Research question, and a personal statement from the researcher as to her motivation for conducting the study. The chapter also points to the purpose for the study and a context in which the instrumental case study took place. Further, the chapter provides an overview of the research design and the significance of the research and the limitations of the study. Finally, the chapter outlines definitions pertinent to this study and a summary of each of the Chapters.

Chapter Two: Review of Literature is comprised of four themes that informed this research in exploring a Josephite approach to education. These four themes include: The Josephite Heritage; Leadership in Catholic Education; Catholic Social Justice Principles; and Educational leadership. These four these bring into focus the conceptual framework that underpins the research.

Chapter Three: Research Plan maps out the approach that was used to investigate this study. The theoretical framework drew its epistemology from a constructivist qualitative approach utilising interpretivism as its theoretical perspective. Specifically, the interpretivist lens underpinning this study is that of symbolic interactionism. The methodology employed in the research was an instrumental case study design that sought to explore the perceptions of Principals and their respective leadership teams involved in this research. From a potential group of 53 schools, six schools were purposefully chosen as a broad representation of schools conducted in the Josephite tradition. Methods of data collection and management are explained. Issues of trustworthiness are considered and ratified and
important ethical consideration for this research are discussed.

Chapter Four: Presentation of research results, presents the collected data in terms of the perspectives of Principals and their respective leadership teams participating in the instrumental case study. Data is presented in order to address the three specific research questions of the research. For each specific research question, the data are analysed with a view to exploring emerging themes within each perspective. Data collected from the Sisters of St Joseph focus group were also presented in relation to the specific research questions. The Sisters’ focus group comments were recorded to illustrate perceptions, realities and experiences of the Josephite tradition. Participant perceptions and tabulated summaries of data are provided.

Chapter Five: Discussion of research results provides an interpretive and analytical discussion of the data presented in Chapter Four. The data presented for each of the six Principals and their respective leadership teams are analysed alongside relevant literature according to each specific research question. Comparisons are made between Principals and Principals, Leadership teams and Leadership teams, Principals and leadership teams, and each Principal and his /her leadership team. Data collected from the Sisters of St Joseph focus group provided a reference upon which to compare data from Principals and leadership team participants. The Sisters’ focus group data was a reference point from which to affirm, clarify or critique data from Principals and leadership team participants.

Chapter Six: Review and conclusions reviews and interprets the results of the research findings in the light of the stated purpose of the inquiry. Following a statement of the research design each of the three specific research questions is briefly answered. A conclusion to the research is then presented outlining the possible contributions the research makes to the scholarly debate. Lastly, implications for the profession are addressed along with suggestions for further research.
Chapter 2
Review of Literature

2.1 Introduction
The purpose of this research is to explore the characteristics and features of a Josephite approach of education that are identified and implemented by Principals and their leadership teams in schools conducted in the Josephite tradition. It seemed appropriate therefore to review the literature on the Josephite Heritage, Leadership in Catholic Education, Catholic Social Justice Principles and Educational Leadership. The outline of the review of literature is provided in Table 2.1.

Table 2.1
Outline of the Literature Review

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<table>
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<td>2.1</td>
<td>Introduction</td>
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<td>2.2</td>
<td>Conceptual Framework</td>
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<td>2.3</td>
<td>The Josephite Heritage</td>
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<td>2.4</td>
<td>Summary</td>
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<td>Leadership in Catholic Education</td>
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<td>Summary</td>
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<td>2.7</td>
<td>Catholic Social Justice Principles</td>
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<td>Summary</td>
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<td>2.9</td>
<td>Educational Leadership</td>
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<tr>
<td>2.10</td>
<td>Summary</td>
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<tr>
<td>2.11</td>
<td>Conclusion</td>
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2.2 Conceptual Framework
The interplay among the four themes highlighted in Table 2.1, i.e. The Josephite Heritage, Leadership in Catholic Education, Catholic Social Justice Principles and Educational Leadership brings into focus the conceptual framework that underpins the research. These four themes directly influence the subject central to the research Educational Leadership in the Josephite tradition. Literature presented on the Josephite Heritage draws primarily on the spiritual tradition, charism and Josephite approach to education. The literature on Leadership in Catholic Education considers the formation of leaders in the faith, theological and spiritual components of leadership in a Catholic
school. The third component of the conceptual framework is Catholic Social Justice Principles. Here the literature explores the underlying Catholic Social Justice Principles required for leaders to implement a Josephite approach to education, namely human dignity, the common good, subsidiarity, solidarity and preferential option for the poor. The final component of the conceptual framework is the literature on Educational Leadership. Three main models are identified that relate to the nature of Educational Leadership in the Josephite Tradition namely: transactional, transformational and transcendental. The conceptual framework underpinning the literature is presented in Figure 2.1

![Conceptual framework underpinning the literature of educational leadership in the Josephite Tradition.](image)

*Figure 2.1:* Conceptual framework underpinning the literature of educational leadership in the Josephite Tradition.
2.3 The Josephite Heritage

The literature on the Josephite heritage refers to the evolving story of the Religious Congregation founded by Mary MacKillop and Julian Tenison Woods, in South Australia in 1866 (Cresp, 2005; Gardiner, 1994; McKenna, 2009). The Congregation was initially named the Sisters of Saint Joseph for the Catholic Education for Poor Children (McKenna, 2009). The original Rule of the Institute declared education was for the children of families in humble circumstances (Woods, 1867). The literature identifies that central to the Josephite heritage is a devotion to the service of those in poor circumstances (Constitutions of the Sisters of Saint Joseph, 2007). The character of the Josephite Heritage is epitomised in the mission described by Mary MacKillop: “seek first the poorest and most neglected parts of God’s vineyard” (Mary MacKillop, 1900 cited in Mother Mary’s Circulars to the Sisters, St Joseph’s Generalate, North Sydney, 1976, p. 205).

Several authors note the Josephite Heritage is shaped by a spiritual tradition integrated into an approach to education that accentuates human dignity (Foale, 1989; Gardiner, 1994; McKenna, 2009; Thorpe, 1994; Tracy, 1981). What follows is an exploration of the literature as it pertains to the Josephite spiritual tradition, the transmission of the Josephite charism and the Josephite approach to education. This literature includes archival materials from the Sisters of Saint Joseph, including reports and conference papers. This archival literature is outlined in Table 2.2

Table 2.2

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<td>6</td>
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</table>
2.3.1 The Josephite spiritual tradition.

The founding figures of the Josephite heritage, Mary MacKillop and Julian Tenison Woods encompassed a charism, a particular gift of the Holy Spirit to inspire a spiritual tradition integrated into an approach to education (Clark, 2015; Gardiner, 1994; Lyne, 1983). A defining aspect of the spiritual tradition is the conviction in the compassionate love of God expressed in a deep respect for each person’s dignity (Clark, 2015; Hull, 1995). The literature highlights the characteristics of the spiritual tradition such as inclusivity, humility, simplicity, and practicality. These characteristics are communicated through the life and work of Mary MacKillop (Clark, 2015; Hull, 1995). The characteristics of the Josephite spiritual tradition and the significance of storytelling will now be explored.

2.3.1.1 Characteristics of the Josephite spiritual tradition.

Spiritual traditions are derived from the founding story originating with the founding figures, in this instance Mary MacKillop and Julian Tenison Woods (Cresp, 2005; McKenna, 2009). The Josephite spiritual tradition is characterised by a commitment to and value for egalitarianism, treating all people as equal, no matter what their status in society. Several authors identify this belief in egalitarianism found in the life and work of Mary MacKillop (Foale, 1989; Gardiner, 1994; Lyne, 1983; Press, 2004; Thorpe, 1994). Egalitarianism stemmed from Mary MacKillop’s Scottish heritage, where equity was valued and expressed in her reverence for every child of God (Foale, 2016; Hull, 1995). The literature acknowledges that Mary MacKillop’s concern for unity in upholding egalitarianism is particularly important considering her prime concern to develop an approach to education that respected the human dignity of each child (Clark, 2015; Cresp, 2005; Gardiner, 1994; McKenna, 2009). According to Gardiner (1994) and McKenna (2009), Mary MacKillop’s devotional spirituality was influenced by the teachings of Saints Teresa of Avila, Ignatius and Francis de Sales, where the love of God promoted a spiritual service of one’s neighbour. A spirituality centred on the service of others seemed appropriate for an Institute whose work was the education of children (Clark, 2015; Gardiner, 1994; McKenna, 2009; Woods, 1867).

2.3.1.2 Spiritual traditions and storytelling.

Spiritual traditions contain coherent sets of beliefs and practices that make
sense of the transcendent (D’Orsa & D’Orsa, 2015). According to Tracy (1981), a spiritual tradition is “shaped by its founding figures and by its ‘classics’, that is, the events, actions, speeches, texts and works of art in which people express themselves in a manner that has universal significance” (p. 167). The ‘religious classic’, illustrated in the life and work of Mary MacKillop, is rich in meaning and can never be exhausted by the re-interpretation of future generations (Tracy, 1981). Groome (1998), Chittister (2017) and Clark (2015) argued spiritual traditions can be reclaimed with critical appreciation as schools thrive on the energy and clarity of the vision, dreams, purpose, values and goals of the tradition. Groome (1998), noted, moreover, “with the integration of time, tradition becomes the past, present and future, lending continuity and new direction” (p. 122). Fabian and Loh (1983), expressed the relevance of Mary MacKillop as the ‘religious classic’ influencing Australia as a whole:

A woman, who in a male-dominated Church, stood alone and succeeded, one who recognised equality of opportunity for the poor, the right to education for all, the one who first demonstrated that an Independent School System for all classes, free of Government aid, could succeed (p. 10).

The ‘religious classic’ and founding story provide a spiritual tradition that continues to be relevant in schools conducted in the Josephite tradition (Clark, 2015; Finucane, 1982; McKenna, 2009).

Spiritual traditions are conveyed through storytelling. The importance of story is made from events to the extent that plot makes events into a story (Arbuckle, 2013). Stories “create identity through music, language, images and gestures so that a series of events provide meaning” (Arbuckle, 2013, p. 12). Storytelling enables individuals and institutions to write and rewrite their identities in particular contexts (Hatch, 2013). The Josephite spiritual tradition is comprised of its founding figure and ‘religious classic’ in Mary MacKillop (Groome, 1998; Tracy, 1981). The Josephite spiritual tradition derived from the founding story is re-told, integrated and re-interpreted in the present time and provides direction into the future, informing a Josephite approach to education (Clark, 2015; Gowdie, 2017).

2.3.2 Transmission of the Josephite charism.

The transmission of the charism from founders to followers provides inspiration to equip leaders in a Josephite approach to education. The concept of
‘Charism’ originates from the Greek word “charisma,” meaning a “gift” given to inspire others (Grace, 2010; Lydon, 2009; Kelly, Christopher, Saunders & Ardito, 2014). The literature on the founding charism of the Sisters of St Joseph is well documented as applied to the works of the Sisters of St Joseph (Foale, 2016; Gardiner, 1994; Lyne, 1983; McKenna, 2009; Press, 2004; Thorpe, 1994). The Constitutions of the Sisters of St Joseph of the Sacred Heart (2007) expresses the founding charism “as devotion to the service of the poor; women working in simple ordinary ways to bring to the poor the message of their human dignity and Christ’s saving love” (p. 8). According to Green (2000) and Marechal (1999, both cited in Gowdie, 2017) charisms provided structure, a story, a language, a way to serve and a work to undertake. The benefits of the transmission of charism to leaders of schools in the Josephite tradition will now be explored in the literature.

2.3.2.1 The Josephite charism and spiritual capital.

Transmitting charisms are beneficial in the development and formation of relationships within a school community while being a source of spiritual capital. Cook and Simonds (2011) and Kelly et al., (2014) contended that core to a Catholic school is the charism around which relationships are formed. These patterns of relationships meet a societal need and are a thread that can be found in ecclesial documents, scholarship, and current educational practice (Catholic Church, 2008, para. 799; Cook, 2015; Cook & Simmonds, 2011). The transmission of charism contains spiritual capital for leaders to draw on as a source of empowerment (Belmonte & Cranston, 2009; Grace, 2010; Green, 2014; Lydon, 2009). According to Grace (2010), spiritual capital is a “transcendent impulse to guide judgement and action, enabling professionals to act as witnesses” (p. 119).

For example, leaders who witness to their own faith have engaged seriously with constructing their own ideological and religious identity in dialogue with the tradition they espouse (Congregation for Catholic Education, [CCE], 1982). The literature highlights the benefits of maintaining distinctive religious charisms with their spiritual capital in the current, demographical situation of the Catholic Church. The benefits of distinctive charisms empower leaders to act as a witness to the particular tradition, to draw on relationships shaped by the charism in school communities and finally, to be open to the transcendent in decision-making and actions (D’Orsa & D’Orsa, 2015; Gowdie, 2017; Lydon, 2009).
2.3.2.2 The prophetic nature of charism.

The prophetic nature of charism provides a compass to guide leaders in decision-making. Dallaire (2013) and Confoy (2013) identified the influence charism has on leadership in times of discernment and decision-making. For example, Dallaire (2013) contended that the prophetic nature of charism provides the opportunity for holiness to be experienced along with critical thought to inspire action for justice, peace and sustainability. When charism is shared it enlivens and connects leaders to its source of inspiration (Havey, 2014). Such a position is also taken by various authors who commented that when leaders draw on the charism they are inspired to serve others, bringing healing and hope, orientating mission to those in poor circumstances (Confoy, 2013; Goldburg, 2016; Grace, 2010). Living witnesses are required to give embodiment to the beliefs and values inherent in charism (Rymarz, 2011). Leaders in Josephite schools have the potential to claim the prophetic role of charism to reinterpret and integrate the spiritual tradition of the Sisters of St Joseph (Clark, 2015; Cresp, 2005; Gowdie, 2017).

2.3.3 The Josephite approach to education.

The spiritual tradition of the Sisters of Joseph of the Sacred Heart informs an approach to education. There would appear to be a paucity of research on the Josephite approach to education as it seems to have emerged from the formation of the Sisters as both religious and teachers. According to O’Donoghue and Chapman (2011), the set of religious practices, rules and customs of the Sisters of Saint Joseph shaped an approach to education and the identity of the Sisters of Saint Joseph as educators.

Josephite education began with Mary MacKillop trialling an approach that was “particularly suited to the elementary Catholic education of the working class, the ‘ordinary’ or working people” (McKenna, 2009, p. 31). A key feature of a Josephite approach to education is a deep respect for each person’s dignity and his or her access to learning (Clark, 2015; Cresp, 2005; Gardiner, 1994; McKenna, 2009). The integration of the secular and religious into the curriculum and daily timetable in a Josephite approach to education is centred on the dignity of each child (Cresp, 2005; Foale, 2016). The Josephite approach to education is focused on ensuring quality Catholic education is available and accessible to those who are isolated or marginalised (Clark, 2015; Duffy, 1966; McKenna, 2009).
What follows is a consideration of the literature pertaining to a Josephite approach to education. Josephite education is identified in relation to faith and community. It is focused on mission and is a practical and holistic approach to education. The literature highlights Josephite education as justice. Finally, the formation of staff is essential in the implementation of a Josephite approach to education.

2.3.3.1 Josephite education in faith and community.

A Josephite approach to education is based on faith and nurtured through the witness of all staff members. Murphy (1982) and Finucane (1982) advocated Josephite education requires the personal witness of a loving, prayerful, serene (joyful) person committed to the task. In particular, Murphy (1982), claimed the teacher as witness has a specific purpose through education “as an effective countersign at all times and a valid expectation of the religious presence” (p. 5). Furthermore, the Sisters emphasised a Josephite approach to education evangelises and nurtures the individual’s relationship with God (Sisters of Saint Joseph, South Australian Province, Charter for Josephite Education, 1991). According to Clark (2015) a Josephite approach to education seeks to “reveal the God of compassion so that people experience the love of God through human action.” (p. 87).

A Josephite approach to education is closely connected with the concept of family and community. Josephite education values identification and relationship with people, particularly families and their social wellbeing (Gardiner, 1994; Hull, 1995; McKenna, 2009; Warhurst, 2012). This relationship with the community extends from the emphasis placed on Josephite education being accessible in the local context of the school and community. The accessibility of a Josephite education stems from a value for inclusivity, where all families and students are welcome in a Josephite school, no matter their circumstances (Clark, 2015; McCleanor, 2001; Murphy, 1982). The literature suggests that the hallmark of a Josephite approach to education is the inclusion of all and especially those who are in poor, marginalised or isolated circumstances (Clark, 2015). This inclusion is reiterated by Murphy (1982) who noted the presence of Josephite Sisters in education should always proclaim a special concern for those in poor circumstances: spiritually, materially, intellectually, physically, socially or those differently able in any way.
2.3.3.2 Josephite education focused on mission.

The literature suggests the purpose and nature of a Catholic school conducted in the Josephite tradition is aligned with the educational mission of the Catholic Church. Murphy (1982) noted the particular context of mission where “our schools are the Catholic Church in microcosm. The Church is the Sacrament of Christ” (p. 3). The particular mission expressed in a Josephite approach to education has the essential elements of “a model of Church as sacramental, communion, worship and dialogue” (Murphy, 1982, p. 3). The Sisters in South Australia claim Josephite education is Catholic in tradition and mission, clearly articulating the purpose of Josephite education: “We have a vision and sense of purpose for our educational role in schools so that we have a ‘Kingdom’ focus and an all–embracing notion of Church” (Sisters of Saint Joseph, South Australian Province, Charter for Josephite Education, 1991). The Sisters recognise they are both “called and challenged by mission” (Sisters of St Joseph, SA Province, Charter for Josephite Education, 1991, p. 1).

A Josephite approach to education aligned with the educational mission of the Catholic Church requires a focus on the charism and spirituality of the Congregation of the Sisters of St Joseph. Reardon (1982) stated this focus enables one to view the implications for the kind of school to be conducted in this tradition. The context of Josephite education provides an expression of God’s mission and is regarded as a beacon for the Church (Finucane, 1982). In particular, Reardon (1982) stated: “in the context of ministry, we need to look at the relation of school to parish to region. We must give a lead in this” (p. 6). The mission of the Josephite educator is to obey the Gospel mandate as emphasised in Catholic Church documents (Congregation for Catholic Education, 1988, 1982). According to Finucane (1982) and Morris (2012) (Josephite) educators must continually examine curricula in order to discover the effectiveness of integrating culture and faith and faith and life (Congregation of Catholic Education, 2008, 2014).

The purpose of a Josephite approach to education is to empower each person to serve others (Sisters of St Joseph, 1991). Clark (2015) claimed this empowerment is gained by “calling forth and developing confidence, knowledge and skills so that each may lead a life of love and service of others” (p. 87). A Josephite approach to education that encourages a practical response in the service of others stems from the principles of human dignity, the common good, subsidiarity and a preferential option.
for the poor (Clark, 2015; Foale, 2016; Warhurst, 2012). Service in humility and simplicity are infused in educational practices in a Josephite approach to education. Authors such as Clark (2015), Lyne (1983), Hull (1995) and Brackley (2004), referred to humility as an expression of each person’s truth, a sense of one’s own limitations and the dignity of the outcast. Brackley (2004) advocated falsified and counterfeit notions of humility need to be unmasked so that inner authority can be developed in leaders. He considered humility gives rise to boldness and courage and stated, “to be authentic, humility must be solidarity” (p. 104). Humility is required for holistic education and is a key characteristic of leadership that serves others in a Josephite approach to education (Clark, 2015).

2.3.3.3 A practical and holistic approach to education.

The literature emphasises a Josephite approach to education that is both practical and holistic. Cresp (2005) described this practical approach to education as “the ability to put your hand to anything” (p. 111). This practicality enables a holistic approach to education evident in the curriculum, policies and practices in a Josephite school (Finucane, 1982; McKenna, 2009; Murphy, 1982). The Josephite approach to education is a “fidelity to duty that ensures quality of teaching, a practicality that frames the curriculum to the needs of our students, and a creativity that inspires and strives to develop the students’ sense of personal dignity” (Murphy, 1982, p. 4). Reardon (1982) poses a question constantly to be used as a litmus test to ensure a holistic approach to education: “Is there a Catholic identity in and through the subjects? Is it permeating like perfume?” (p. 6). The holistic nature of learning encourages educators to consider the form of discipline, the capacity for student decision-making and the forms of assessment used in schools to ensure congruency with the Josephite tradition (Malone, 1982).

2.3.3.4 Josephite education as justice.

The literature suggests a Josephite approach to education is imbued with social justice principles. According to Pickering (1982) Mary MacKillop’s version of social justice was “not to preach, nor to denounce social injustices with arrogant provocative words” (p. 3). Rather, her model was an effective integration of social justice in everyday life (Hull, 1995). Mary MacKillop’s sense of justice was grounded in the reality of the circumstances she encountered. She was armed with a

The concept of justice in Josephite education is focused on the human person. The literature suggests that education in the Josephite tradition places students and their families as central in the quest for justice. Pickering (1982) noted: “the subject and the goal of all social institutions, of all action on behalf of justice, are and must be the human person” (p. 3). Reardon (1982) reiterated the centrality of the human person: “What is my concept of person? As I see person, so I see my concept of education” (p. 6). Malone (1982) emphasised the care for persons, things, and the use of resources as indicative of the presence of God.

The integrated nature of justice in a Josephite approach to education is based on the Beatitudes (Matthew 5: 1-11) where solidarity with those who are in poor circumstances is emphasised as the heart of the Gospel message. Schools need to look to its own processes to see if they model the Beatitudes, this is a most challenging exercise (Reardon, 1982). Hull (1995) highlighted an option for the poor, radical poverty and solidarity as core to a Josephite approach to justice, where there is no distinction between the individual and the group. Murphy (1982) reiterated the prophetic nature of a Josephite approach to education. She stated: “our (Josephite) presence in education is a prophetic one, a reproach against injustice” (p. 3). Justice is not just an ‘add on’ in a Josephite approach to education but rather is seamlessly integrated in the expression of charism and mission, including pedagogy, and the pastoral care of students and families (Dutton & Kahler, 2017).

2.3.3.5 Josephite education and the formation of staff.

A Josephite approach to education relies on formation, collaboration and partnership with lay leaders in Josephite schools. Collaboration with lay staff members stemmed from the teachings of Vatican II. According to Murphy (1982) the formation experiences offered to staff enable them to “capture and share our Josephite spirit” (p. 5). Moreover, the careful selection of staff members who resonate with the (Josephite) spirit will in turn enable them to be animators and inspirators of the charism. Malone (1982) and Murphy (1982) stressed the importance of preparation and formation of staff. Reardon (1982) emphasised teaching as a form of ministry not simply as a profession. The collaboration and formation of staff members is highlighted as essential in a Josephite approach to
education. According to Murphy (1982) “lay staff members are collaborators participating fully in the apostolic work, often in need of witness and guidance” (p. 4). The Sisters advocated sharing the Charism with co-workers was a means of appreciating the local community support and enabled the Sisters’ dependence on others (Sisters of St Joseph, 1991).

2.4 Summary

The review of literature on the Josephite Heritage has focused on the Josephite spiritual tradition, the transmission of the Josephite charism and the Josephite approach to education. The Josephite spiritual tradition is characterised by a belief in a conviction of a compassionate God and the provision of Catholic education for those in poor circumstances. The literature on the transmission of the Josephite charism to leaders of schools conducted in the Josephite tradition indicates the importance of this tradition in shaping a Josephite approach to education. Finally, a Josephite approach to education is characterised by a formation in faith and the development of community and Church. Moreover, this formation of leaders is seen as essential for collaboration in implementing a Josephite approach to education. The review of literature on the Josephite Heritage led to the first research question:

- What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics of the Josephite tradition in their respective school community?

The review of literature now considers literature pertaining to Leadership in Catholic Education. A feature of the Josephite tradition is to “be in harmony with and to contribute to the total mission of the local Church” (Constitutions of the Sisters of St Joseph of the Sacred Heart, 2007, p. 8). It is therefore appropriate to consider the literature on leadership in Catholic Education as it provides the context for educational leadership in the Josephite tradition.

2.5 Leadership in Catholic Education

This section draws on literature pertaining to Leadership in Catholic Education. In particular, the elements of faith, theology and spirituality are vital components to the role of Catholic Principals and their leadership teams. The literature provides an overview of leadership in faith, theology and spirituality.
Literature on leadership and faith identifies the capabilities required for a personal and professional commitment. Literature on theology and leadership emphasises ‘doing theology’ (theological reflection) as a tool that develops faith and enables leaders to enrich decision making and develop congruency with the Josephite spiritual tradition. The importance of spirituality and leadership is explored in the literature as spirituality is emerging as the primary stance in Catholic educational leadership. Finally, the literature pertaining to formation for mission is considered as it supports Principals and their leadership teams in developing coherency between the Josephite spiritual tradition and leadership practice.

2.5.1 Faith and leadership.

Faith is integral in the Principal’s role and is considered vital for the Catholic identity and mission of the school (Congregation Catholic Education, 2008, 2014). Leadership in faith is inextricably woven through the role of Principal, requiring both a personal and professional commitment (Neidhart, 2014). The South Australian Commission for Catholic Schools [SACCS], equated Principals with those who are appointed to designated Religious Leadership roles in a Catholic school and have committed themselves to a public ministry in the Church (Catholic Education South Australia, [CESA], 2015). Principals are responsible for nurturing this faith leadership in their leadership teams (Conditions of Employment for Principals and Deputy Principals of South Australian Catholic Diocesan Schools, 2013).

The literature suggests that Principals and their leadership teams, as people of faith called to discipleship, are to serve others as exemplified in the life of Christ. Principals and leaders are to be the face of the Church, “to be its best advocate, integrating professional, spiritual and communal qualities in the commitment to the ministry of education” (Gowdie, 2017. p. 17). It is on this basis that Principals and their leadership teams in schools in the Josephite tradition are called to lead and serve in their respective community. Ideally, leaders are committed to lifelong professional development in order to lead the faith community. The leaders’ capacity to engage in lifelong spiritual growth, to nurture that in others, and to be well versed in theology, underpins leadership in Catholic education (Congregation for Catholic Education, Commission [CCE], 1988, 1998, 2014; Gowdie, 2017; Hellwig, 1998; National Catholic Education Commission [NCEC], 2005; SACCS,
2.5.1.1 Capabilities for leadership in faith.

The capabilities required for leadership in faith in Catholic education speak to the very mission of the Church (NCEC, 2005, 2017). These capabilities are based on key principles derived from Church teaching (CCE, 1998, 2008, 2014; Benedict XV1, 2005). Leadership in faith may be described as a process of ‘meaning making’ as a way of knowing, a way of constituting one’s experience in the world (Fowler, 1981). Several authors note that research into the faith leadership role of Catholic school leaders attests to both the expectations and demands for authentic faith leadership as vocation and ministry within the evangelising mission of the Church (Belmonte & Cranston 2009; D’Orsa & D’Orsa, 2015; Gowdie, 2017; Neidhart, 2014; Neidhart & Lamb, 2010; Sultmann & Brown, 2016). According to Neidhart, Lamb and Spry (2012) “Principals recognise faith leadership as an important dimension of their role. They can never opt out” (p.32).

Several authors identified some of the essential elements in the enactment of faith leadership: faithful and faith filled leadership, personal faith commitment and a preparedness to witness to gospel values and religious practice (Neidhart, 2014; Neidhart, Lamb & Spry, 2012). According to D’Orsa and D’Orsa (2010) “faith needs both practical and symbolic expression” (p. 15). Thus, they advocated the process of theological reflection as a means of “faith seeking insight and meaning in the events of our personal and collective lives” (D’Orsa & D’Orsa, 2010, p. 15). Principals and their leadership teams require these capabilities for leadership in faith to implement a Josephite approach to education in their respective communities.

2.5.2 Theology and leadership.

Various authors contend theological leadership is the capacity of leaders to communicate the Gospel and its expression within the context of their community (Bevans, 2009; D’Orsa & D’Orsa, 2013; Sharkey, 2015). Theological leadership is paramount for the integrity of mission and expression of charism. Ballard (2011), D’Orsa and D’Orsa, (2013) and Sharkey (2015), all noted that the process of theological reflection or ‘doing theology’ is the prerogative of leaders. According to D’Orsa and D’Orsa, (2013) ‘doing theology’ is about exploring the religious significance of a leader’s actions and is an allied concept to ‘mission’ which gives
religious significance to the leader’s actions. Sharkey (2015) claims ‘doing theology’ is one of the most critical things a leader in a Catholic school must be able to do if the school is to have a vibrant and engaging Catholic identity. D’Orsa and D’Orsa, (2013) referred to two key features necessary in ‘doing theology’. They asserted ‘doing theology’ is firstly a “meaning-making process and secondly, concerns the people involved” (p. 233). The communal and contextual nature of ‘doing theology’ is pertinent to leaders in schools in the Josephite tradition.

2.5.2.1 Theological reflection– communal and contextual

Several authors commented that theological reflection is the capacity of leaders to ‘make meaning’ of situations and events in the light of the Gospel. Theological reflection is both contextual and communal enabling leaders to engage in the synthesis of life, culture, faith and learning (Bevans, 2016; D’Orsa & D’Orsa, 2013). Rooms and Ross (2014) emphasised that the deep communal and dialogical nature of theological reflection must be based on human experience. According to Kinast (2000) the process of theological reflection used by school leaders must be “portable, performable and communal” (p. 7). Creating opportunities for leaders to experience the benefits of theological reflection to enrich their leadership is paramount in a Josephite approach to education.

2.5.2.2 Theological reflection, discernment and decision making.

The capacity for leaders to engage in ‘doing theology’ or ‘theological reflection’ enriches discernment and decision-making processes undertaken by leaders (Rooms & Ross, 2014). Theological reflection is applicable in school leadership as it “insists on making the connections and grounding decision making in the nitty gritty of frail reality and context” (Rooms & Ross, 2014, p. 147). According to several authors the capacity for consensus to be developed through the process of theological reflection creates space for differences to be respected thereby increasing the opportunity for congruency in leadership practice (D’Orsa & D’Orsa, 2015; Pollefeyt & Bouwens, 2010; Sharkey, 2015). Theological reflection undertaken by leaders promotes the alignment of charism and mission with leadership practice (D’Orsa & D’Orsa, 2015; Gowdie, 2017). Research conducted by Neidhart and Lamb (2016) reported that leaders are interested in “seeking support to develop more effective faith leadership behaviours, together with ethical frameworks for decision-
making and communication” (p. 56). Neidhardt and Lamb (2016) also noted Principals requested a clarification of role expectations and support in identifying ‘gaps’ with respect to professional and spiritual competencies. Theological reflection is considered one way of assisting with building leaders’ capacity for discernment (Gowdie, 2017).

2.5.2.3 Theological perspectives for congruency of spiritual traditions and leadership practice.

The literature suggests theological perspectives provide the capacity for developing coherency and integrity between leadership practice and the Josephite spiritual tradition. Theological perspectives are found in Catholic Education frameworks designed for school improvement (Catholic Education South Australia (CESA), Continuous Improvement Framework for Catholic Schools, 2014; D’Orsa & D’Orsa, 2015; Gowdie, 2017; Hindmarsh, 2017; NCEC, 2017; Sharkey, 2015). According to Gowdie (2017) all these frameworks for improvement have a justice perspective, such as “a preferential option for the poor and vulnerable, the stewardship of creation, human rights and human dignity” (p. 89). Theological perspectives provide leaders with the capacity to align their practice with spiritual traditions. Green and McGregor (2015, p. 136) stated “the most telling litmus test of integrity of any spiritual tradition or family is its alignment with mission”. The limited theological understanding by leaders in enacting the values, and context of tradition, could possibly distort, dilute or ignore the broader context (Dutton & Kahler, 2017). In schools conducted in the Josephite spiritual tradition, the leaders’ capacity to engage in the process of contextual and communal theological reflection (‘doing theology’) enriches the revelation of the compassionate love of God, in the ‘nitty gritty’ of school life.

2.5.3 Spirituality and leadership.

As a concept, the spirituality of leaders is emerging as the primary stance in Catholic educational leadership. A Catholic understanding of spirituality is rooted in the Christian tradition of discipleship as “self-transcendence and orientation towards the other” (Gowdie, 2017, p. 60). Several authors identify spirituality as inspiring and giving meaning and significance to work and life (Rohr, 2013; Rolheiser, 1999; Silf, 2010). Spirituality is integral to all that takes place in Catholic school
communities. Ma and Ross (2015, p. 9) noted: “Spirituality is not an additional dimension to be considered when all other matters are in place, rather it is the central thing around which everything else ought to revolve”. Religious Congregations have used the concept of charism rather than spirituality to describe the distinguishing characteristic of their spiritual tradition (Gowdie, 2017). For example, Clark (2015, p. 89) declared the translation of the Josephite charism into every-day experiences shapes spirituality noting: “spirituality is what we say and do as a consequence of what we believe about God, others, self and our world”. Spirituality accompanying faith and theological leadership is integral to the role of Catholic school leadership (NCEC, 2017). A number of authors note an evolving understanding of Christian spirituality is characterised as an intrinsic human capacity for meaning making: it enables the transcendent, and is both holistic, connective and seeks justice (Crawford & Rossiter, 2006; D’Orsa & D’Orsa, 2013; Grace, 2010; Harris, 1996; Hull, 1995; Lavery, 2012; Tacey, 2017; Tisdell & Tolliver, 2003).

2.5.3.1 Spirituality and ‘meaning making’ for justice and mission.

The literature suggests that spirituality enables leaders to orientate their leadership towards justice and mission. Several authors noted the benefits of spiritual leadership when one acts justly in diverse situations. According to Harris (1996) spirituality is what animates the call to discipleship and enables the quest for justice. Rolheiser (1999) considered spirituality as empowering leaders to meet the demands of diversity and pluralism. Tolliver (2016) advocated embracing spirituality in the workplace to transform learning and create openness to social justice.

The holistic and robust nature of spirituality and leadership is highlighted in the literature. Rahner (1973, cited in Gowdie, 2017) emphasised the holistic nature of spirituality as “engaging the whole person, head, heart and hands” (p. 87). Integrating spirituality within leadership is a rigorous process according to Thompson (2005) who noted: “spiritual leadership is not holier than thou, head in the clouds, unaccountable pious jargon” (p. 4). The practical application of spiritual leadership enables the “nexus between personal meaning-making and mission shaping to be explicit and transparent” (Gowdie, 2017, p. 157). Leaders in schools in the Josephite tradition have the capacity to draw on the various sources of spirituality for ‘meaning making’ in the quest for justice and leading mission. What
follows is a review of formation for mission in developing coherency between the Josephite spiritual tradition and leadership practice.

2.5.4 Formation for mission.

The literature situates formation for mission in Catholic Education in the context of the broader Catholic Church. Connolly (2015) identified challenges in the formation for mission as the need to return to the Gospel, a reformation of the Church as community and the need for dialogue and reciprocity. According to Duignan (2005) and Neidhart (2014) the nature of formation is defined in a Christian sense as a new religious consciousness and transformation. This formation includes formal academic programs in theological, spiritual and educational leadership, as well as informal learning opportunities for ‘conversation’, ‘networking’ and ‘personal reflection’ (Gowdie, 2017; Neidhart, Lamb & Spry, 2012). While recognising the diversity of formation experiences, several authors note a more systemic and deliberate approach to formation is required for leaders in schools (Gowdie, 2017; Neidhart, Lamb & Spry, 2012; Sultmann & Brown, 2016). Various models of formation are cited in the literature (Gowdie, 2017; Hindmarsh, 2017; NCEC 2005; Neidhart, 2014; Sharkey, 2015). All these models are viewed through a “lens of mission thinking, focusing on the Who and Why questions” (D’Orsa & D’Orsa, 1997, p. 269).

The National Catholic Education Commission (NCEC, 2017) has identified key principles to be observed in a Framework for Mission Formation. The Framework specifies the intentions of leadership formation for mission. These points are developed further in specific reference to formation in faith and leadership, and formation in spirituality and leadership. The formation of leaders through accompaniment and mentoring is considered important in the formation of Catholic school identity.

2.5.4.1 Formation in faith and leadership.

The literature identifies the strengths and opportunities for formation in the faith dimension of Catholic school leadership. The research indicates leaders are mindful of their limitations in relation to faith leadership capabilities and the need for skills, knowledge and attitudes to engage faith leadership in changing social and cultural contexts (Belmonte & Cranston, 2009; Neidhart, Lamb & Spry, 2012;
According to Neidhart and Lamb (2016), the formation of leaders in faith is an urgent priority that requires time and conversation despite the challenging and confronting nature of talking of personal faith. Several authors noted the growing significance of the role of the Principal in faith development as students, families and staff members become increasingly disengaged from Church (Gowdie, 2017, Neidhart, 2014; Neidhart, Lamb & Spry, 2012).

The National Catholic Education Commission (2005) identified the practices and issues surrounding faith leadership. The report highlighted several priorities including the connection between authentic Catholicity and the person of the leader, the ecclesial realm of leadership and the need for ongoing research. Neidhart and Lamb (2016) warned against generic formation programs and a ‘one size fits all’ approach suggesting the success and sustainability of Catholic schools depend on the capacity for faith leadership into the future. According to Neidhart (2014) faith leadership represents a synthesis of professional and spiritual competence. The transformational power of spirituality and leadership is now considered.

2.5.4.2 Formation in spirituality and leadership.

The integral nature of spiritual leadership calls leaders in Catholic schools to attend to the beliefs underlying their decisions and actions and to engage in the formation of their spirituality. Several authors highlight the transformational power of spiritual leadership informed by Catholic Tradition and Gospel values (Carlin & Neidhart, 2004; Kriger & Seng, 2005). The vocational nature of spiritual leadership formation that is grounded in a Catholic rich tradition is considered to be effective in leading school communities (Grace, 2015; Gowdie, 2017; Neidhart, 2012). Neidhart and Lamb (2016) contended that spiritual formation is essential as leaders are increasingly responsible for leading staff and students into an experience of the transcendent in their lives. The importance of attending to spiritual growth is reiterated by Grace (2010) who claimed, “being a personal faith witness is one thing but being a source of spiritual inspiration is quite another” (p. 16). According to Gowdie (2017), “authentic spiritual professional and personal formation is probably the most confronting and challenging journey for leaders and educators” (p. 23). This challenge was noted by Camilleri (2017) who observed the tendency for school leaders to divert their focus to the formation of students when faced with their own formation during staff formation sessions.
The National Catholic Education Commission (2017) stressed the role and responsibility educational leaders have for staff faith formation. Several authors’ presented models of spiritual formation applicable for the spiritual formation of leaders in schools conducted in the Josephite tradition (Gowdie, 2017; Palmer, 2007; Sharkey, 2015). Examples of such models of formation ranged from retreats, reflection days, narrative reflection and mentoring as effective formation methods to address the whole person (Gowdie, 2017). Rahner (1975) advocated spiritual formation that emphasises humility, openness and diversity as values that enable leaders to enter dialogue with the spiritual tradition.

Spiritual formation is identified as the “sleeping giant” in Catholic education (Gowdie, 2017, p. 7). The spiritual traditions of Religious Congregations such as the Sisters of Saint Joseph can inform and enrich this formation. Several authors contended that leadership formation aligned with the interest in Catholic school identity represent a positive development for Catholic Education in Australia (Neidhhart & Lamb, 2016; Sharkey, 2015). Spiritual leadership formation can be influenced by the accompaniment and mentoring of leaders in faith, theological reflection and in the spiritual tradition of the Sisters of St Joseph.

2.5.4.3. Formation of leaders through accompaniment and mentoring.

The literature suggests the art of accompaniment and mentoring is beneficial in the formation of Catholic school principals and leaders. The importance of a significant person accompanying and mentoring leaders in quality reflection processes is considered key in the formation of leaders (NCEC, 2017, Gowdie, 2017). The art of accompaniment or companioning is closely linked to the formation of leaders whereby authentic relationships are understood to be transformational in the life of the participant (Boyle, Haller & Hunt, 2016; Gowdie, 2017; NCEC, 2017; Francis I, 2013a). Several authors advocated mentoring in the context of the religious tradition provides benefits in planning, formation and accountability (Gowdie, 2017; Hunt, Oldenski & Wallace, 1999; Muir, 2014; Riley, 2009; Smith, 2007). The Christian tradition calls leaders in Catholic schools to prayerful discernment through theological reflection and hence the guidance of a mentor or companion, which provides transforming benefits for leaders (Gowdie, 2017). The art of accompaniment and mentoring promotes faith, theological and spiritual formation of leaders in the Josephite tradition and has a sustainable influence in
shaping the Catholic Josephite identity of the school community.

2.5.4.4 Formation of Catholic school identity.

The literature emphasises that the leadership in faith, theology and spirituality exercised by Principals and leaders is essential in shaping the Catholic identity of schools. The perspective of several authors is that the Catholic identity of schools is important in shaping a world view, and the future of Church and society (Bauer, 2011; Bevans & Schroeder, 2004; D’Orsa & D’Orsa, 2010). The challenge of leading the Catholic school as an educational community where faith, learning, culture and life find a meeting place is highlighted by Pollefeyt and Bouwens (2010), Sharkey (2015) and Sultmann and Brown (2016).

The literature pertaining to Catholic identity promotes the Enhancing Catholic School Identity Project (ECSI), a research-based project assisting Catholic school communities to become the “architects and creators of culture” (Cook, 2001, cited in Gowdie, 2017, p. 141) and Catholic school identity (Duignan & Cannon, 2011). Several authors refer to the value of the ECSI project adopted in Catholic schools in South Australia and Victoria (Gowdie, 2017; Pollefeyt & Bouwens, 2010; Sharkey, 2015). The ESCI project is considered as a means of empowering leaders in the process of “decontextualizing Catholic identity in a de-traditionalizing and pluralising culture” (Pollefeyt & Bouwens, 2010, p. 193). Principals and their leadership teams draw on their faith, spirituality and theological knowledge and skills to promote a symbolic style of faith as the most fruitful for the development of identity of Catholic schools in a pluralised society (Pollefeyt, 2009). The integration of faith, theology and spiritual leadership coherency with the Josephite Spiritual tradition shapes the identity of Catholic schools in the Josephite tradition.

2.6 Summary

The review of literature on Leadership in Catholic Education focused on faith and leadership, theology and leadership, spirituality and leadership and formation for mission. Firstly, the literature outlined the capabilities required for authentic faith leadership. These capabilities included leaders demonstrating a personal faith commitment and preparedness to witness to Gospel values and religious practice. Secondly, the literature on theology and leadership emphasised the practical component of ‘doing theology’ or theological reflection as a tool to assist leaders to
deepen their decision-making and discernment. Thirdly, the literature on spirituality and leadership highlighted the pivotal role spirituality has in enabling the quest for justice. Finally, the literature on formation for mission highlighted the urgent need for formation to support leaders in integrating faith, spirituality and theological leadership so they can lead staff, students, families and school communities towards the Transcendent. The literature on Leadership in Catholic Education considered the integration of faith, spirituality and theology as vital in shaping future Church and society. The review of literature in this section influenced the formulation of two specific research questions:

- What do Principals and their leadership teams, in schools conducted in the Josephite tradition, identify as the characteristics underlying a Josephite approach to leadership in the context of the school community in which they serve?
- In what ways are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their leadership teams?

What follows is a review of the literature on the underlying Catholic Social Justice Principles required for leaders to implement a Josephite approach to education.

### 2.7 Catholic Social Justice Principles

This section draws on literature pertaining to Catholic Social Justice Principles. These five key principles are identified as being valid in considering a Josephite approach to education. The five principles are human dignity, common good, preferential option for the poor, solidarity and subsidiarity (Cornish, 2009). These five principles are referred to as permanent or perennial principles, summing up the core of Catholic Social Teaching (Cornish, 2009).

Literature on the principle of human dignity identified dignity as the bedrock of all Catholic social ethics expressed in Catholic Church teaching. The dignity of the human person is rooted in each person’s creation in the image and likeness of God (Catholic Church, 2006, para. 358). Literature on the principle of the common good emphasises the commitment of the community in helping all its members achieve their authentic human development more fully (Paul, V1, 1965a). Literature pertinent to the preferential option for the poor is drawn from Catholic social thought encouraging the community of Jesus’ followers to stand with the victims of injustice as integral to God’s mission in proclaiming, celebrating and serving the gospel of
Jesus Christ (Australian Catholic Social Justice Council, [ACSJC], 2014). This literature examines how Catholic schools respond to the gospel imperative to care for and include the most vulnerable in their respective community.

The principle of solidarity recognises that human beings are social by nature and can only grow and achieve potential in relationship with others (Catholic Church, 2008. Para. 414; Cornish, 2009). Finally, literature on the principle of subsidiarity is concerned with participation and decision-making so that responsibility for decisions is kept at the most appropriate level of the organisation (Catholic Church, 2006, 403). Mary MacKillop’s life and work was Catholic social principles in action, illuminating these key components of Catholic social teaching well before they were formalised in the Catholic Church (Warhurst, 2012). It is pertinent that these formalised principles of Catholic Social Justice be examined considering the implementation of a Josephite approach to education. The review of literature refers to the Catholic Church Documents outlined in Table 2.3 and Encyclicals in Table 2.4.

Table 2.3

Catholic Church Documents: Sacred Congregation for Catholic Education (CCE)

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<thead>
<tr>
<th>No.</th>
<th>Document Title</th>
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<tbody>
<tr>
<td>1</td>
<td>The Catholic School (1977)</td>
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<td>2</td>
<td>Lay Catholics in Schools: Witnesses to Faith (1982)</td>
</tr>
<tr>
<td>3</td>
<td>The Catholic School on the Threshold of the Third Millennium (1998)</td>
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<tr>
<td>6</td>
<td>Educating to Intercultural Dialogue in Catholic Schools: Living in Harmony for a civilization of love (2013)</td>
</tr>
<tr>
<td>7</td>
<td>Educating Today, Tomorrow: A Renewing Passion (2014)</td>
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<td>8</td>
<td>Educating Fraternal Humanism (2017)</td>
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Table 2.4

Catholic Church Documents – Encyclicals

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<tr>
<td>1</td>
<td>Pope Paul VI, Gaudium et Spes (1965)</td>
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<tr>
<td>2</td>
<td>Pope John Paul II, Laborem Exercens (1981)</td>
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<tr>
<td>3</td>
<td>Pope Paul VI, Gravissimum Educationis (1965)</td>
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2.7.1 Human Dignity.

Literature on the dignity of the human person is considered the foundational principle of Catholic Social Justice teaching. The Pontifical Council for Justice and Peace (Wiley, 2012, p. 105) highlighted the Catholic Church’s teaching on human dignity as “Imago Dei (Image of God); the living image of God in each man and woman, in every person”. This core tenet of Catholic Social Justice teaching stems from the scriptural text of Genesis 1: 27: “God created humankind in God’s image, in the image of God, God created them, male and female God created them”. Catholic Church teaching emphasised that each human person is endowed with a spiritual and immortal soul, intelligence and free will, ordered in God (Catholic Church, 2008. Para, 412).

Pope John Paul II (1991) stressed the importance of each individual recognising his / her inherent worth. He stated, “we recognise in (our) selves and in others the value and grandeur of the human person” (para. 24). From the inherent dignity of every human person flow certain fundamental rights such as life, security, work, a family income, freedom, education and to have one’s culture respected (ACSJC, 2014). Several authors refer to human flourishing as an expression of the fulfilment of human dignity (Gruijters, 2016; Holman, 2014; McKinney & Sullivan, 2016). McKinney and Sullivan (2016), noted: “human persons flourish, and find lasting happiness or joy, to the extent that their particular lives are lived according to their nature, increasingly conforming to and fulfilling their creation in the image and likeness of God” (p. 176). Storz and Nestor (2007, cited in Scanlan, 2010) applied the principle of human dignity to Catholic education, stating: “human dignity is at the very core of our vocation as Catholic educators” (p. 10). The human dignity of children is particularly emphasised in the literature.
2.7.1.1 Human dignity and children.

The literature on Catholic Social Justice teaching has consistently highlighted the inherent dignity of the child. As early as 1971, Rahner (cited in Bunge, 2004) stated: “Childhood itself has a direct relationship with God. It touches upon the absolute divine of God not only as maturity, adulthood and the later phases of life touch upon this but rather in a special way of its own” (p. 36). Pope Francis stated that human dignity in the life of the child is a source of inspiration for educators to see that every child is held in God’s infinite tenderness, and God is present in each of their lives (Francis I, 2013b). Focusing on a child’s dignity promotes him / her as a competent and accomplished human being and citizen (Rinaldi, 2017).

Several authors noted the implications for promoting the development of educational philosophies and practices that honour an authentic image of the child (Bunge, 2004; Mountain, 2007; Rinaldi, 2017; Wall, 2010). Rinaldi (2017) claimed the ‘pedagogy of listening’ between adults, children and the environment is the premise of every educational relationship. Wall (2010) argued that considerations of childhood should not only have greater importance but fundamentally transforms how morality is understood and practised.

Catholic tradition has reinforced the notion that “every child is of “inestimable worth and that the mystery of God is revealed in children’s experience, even amidst life’s brokenness and limits” (Catholic Education South Australia, 2015, p. 5). Several authors refer to the context of western culture and the commodity of consumerism having an impact on the human dignity of the person, particularly on children’s self-understanding (Holman, 2014; McKinney & Sullivan, 2016; Scanlan, 2010). According to Rahner (1971), God’s love through the pledge of grace, prevents the brokenness experienced by children and young people as having “the loudest or last word” (CESA, 2015, p. 8) and that God’s healing mercy can be mediated through the life of every believer. The continual call to place the dignity of the human person, particularly the child, at the centre of Catholic Josephite education, consistently promotes a holistic, integrated approach to education (Constitutions of the Sisters of St Joseph of the Sacred Heart, 2007).

2.7.1.2 Human dignity and Catholic education.

The literature reinforced the role Catholic Education has in enhancing the dignity of children and young people. The Congregation for Catholic Education
[CCE], 1977) noted the tendency to reduce education to its purely technical and practical aspects and advocated for educational practice to be a synthesis of culture and faith. Furthermore, Catholic schools were encouraged to go beyond knowledge and to educate people to think, evaluating facts in the light of values (CCE, 2013). More recently, the Congregation for Catholic Education (2014) called for holistic integrated education “where contemporary educators have a renewed vision, which has the ambitious aim of offering young people an integral education as well as assistance in discovering their personal freedom, which is a gift from God” (p. 150).

Several authors referred to the importance of focusing on the human dignity of the person in the light of globalisation (Bradley-Levine & Carr, 2015; Cremers, 2017; Heft, 2006). Holman (2014) noted that “education was for human fulfilment and conversely when ambition, competition and self-advancement dominate then it leads to frustrating dehumanisation” (p. 142). Catholic Social Justice Teaching offers a vision of humanity that rejects intolerance and proclaims that human life is sacred and that the dignity of the human person should be the foundation of a moral vision for society (Gruijters, 2016).

Catholic schools aim to embody the main themes of Catholic social justice teaching; particularly the dignity of the human person when education serves the child’s needs (Cameron, 2013, cited in Elshof, 2015). Research conducted by Mucci (2015) identified how teachers’ beliefs about Catholic social justice teaching, particularly human dignity, had an impact on their response to student behavioural problems. Research undertaken by Storz and Nestor (2003) found students could identify how a climate of caring was a fundamental requirement for Catholic schools committed to respecting the life and dignity of the human person. The dignity and sacredness of every human life, along with the idea of the common good, forms the bedrock of Catholic social teaching (Groody & Gutierrez, 2013). According to Clark (2015), the-God given dignity of the human person is a core belief in the Josephite tradition where a deep respect for the needs of those served is central.

2.7.2 Common Good.

Literature on the tenet of the common good is applicable to every social group taking account of the needs and legitimate aspirations of other groups and the human family (Catholic Church, 2006, para. 407; Cornish, 2009, Pope John Paul 11, 1991). The teaching of Vatican II described the principle of the common good as a
means of social morality: “the sum of those conditions of social life which allow social groups and their individual member’s relatively thorough and ready access to their own fulfilment” (Paul VI, 1965, para. 26). The literature highlights the ancient concept of the common good, drawing on Aristotle (350 BC) to describe the cultivation of the virtues and the legislatively political good order that ensured the “individual’s service to the State was not mere self-aggrandisement” (Donlevy, 2008, p. 163). According to the United States Council of Catholic Bishops (2005, cited in Mucci, 2015), every individual has a right to participate and should seek the common good for all individuals in a community.

Several authors noted the common good is realised when the community is committed to helping all of its members achieve their authentic human development more fully (Henriot, Hug & DeBerri, 2003). Mucci (2015) claimed the common good is a communal effort of both teachers and students building a community that values every individual. The common good is applied to the community aspect of Catholic schools in the way relationships are built with students’ families, between colleagues and amongst students (Storz & Nestor, 2003).

2.7.2.1 Common Good – inclusion and diversity in Catholic education.

The common good is exemplified by democratic ideals evidenced in the practice of inclusion which promote fairness, individual rights, justice, equity and respect for diversity (Donlevy, 2008; Groody & Guiterrez, 2013; Mucci, 2015). Donlevy (2008) conducted research into the inclusion of non-Catholic students in Catholic schools. He found that students and teachers alike were “deeply affected through inclusion and by such acceptance of diversity and plurality within their school” (p. 167). The inclusive and diverse nature of Catholic education is exemplified by leaders and teachers who “bring to life in the students the communitarian dimension of the human person, as every human being is called to live in a community, as a social being, and as a member of the People of God” (CCE, 1982, para. 22). Inclusivity and diversity are highly valued in a Josephite approach to education.

Religious pluralism and diversity in Catholic schools is indicative of the common good (Pollefeyt & Bouwens, 2010). Research undertaken by Pollefeyt and Bouwens (2010), found an open view on social questions and religious diversity, together with an attitude towards the contemporary meaning of the Catholic
tradition, enables a dialogue between faith, culture and life. Furthermore, the principle of the common good enables a connection with the other providing an antidote to individualism within society (Elshof, 2015). The challenge to include those in vulnerable or marginalised circumstances in Catholic education was highlighted in the Social Justice statement, *A Rich Young Nation* (ACSJC, 2014). Examples of Australia’s entrenched social disadvantage, such as the limitations of accessible education and the high proportion of unemployment for Indigenous people, posed challenges to the Catholic Church and society (ACSJC, 2014).

2.7.2.2. Embodying the common good in Catholic schools.

The Catholic school and its embodiment of the common good have the potential to be an inspired community that “stands close to life and offers an accessible way of being Church” (Elshof, 2015, p. 158). The common good is realised in Catholic education when schools are focused on creating mission and vision statements that are continually critiqued, clarified and are open to be challenged (Bryk, Lee & Holland, 2009; Elshof, 2015). Several studies investigating Catholic schools illustrated the attempt by these schools to cultivate a school culture that combined an orientation to the personal development of the students with attention to the needs of others and openness to the world (Bryk, Lee, Holland & 2009; Hansen, Wozniak, & Diego, 2015). The common good is characteristic of Catholic schools in an implicit and embodied way through openness towards society and their willingness to contribute to civil engagement (Cameron, 2013, cited in Elshof, 2015). Leaders of schools in the Josephite tradition have the responsibility of nurturing the common good in the school community in which they serve by ensuring congruency between mission and vision statements and their leadership practice.

2.7.2.3 Nurturing the common good in community.

Leaders and teachers in Catholic schools have a significant role in bringing to life in students the communitarian dimension of the human person (CCE, 1982). Specifically, the CCE (1982) noted, “every human being is called to live in a community, as a social being, and as a member the people of God” (p. 22). The common good is nurtured in school communities through liturgy and sacramentality. Community is built in “the sharing and acknowledgement of rituals and symbols, the
bonding relationships and the spontaneous egalitarian commonality with others that transforms the immediate” (Foster, 1982, cited in Donlevy, 2008, p. 58). Moreover, the sense of belonging created in Catholic schools is partially due to the Catholic Church’s shared history, mission and beliefs expressed through the re-interpretation of tradition in the present time (Donlevy, 2008).

The connectedness between Church and school, which may be less recognisable yet is a deeper reality than past years, has the potential for a new expression of the common good (Elshof, 2015). A core way in which Catholic schools contribute to the common good is evidenced by the value placed on relationships and the priority given to educating students in marginalised circumstances (Constable, 2012; Scanlan, 2010). Leaders in schools in a Josephite approach to education contribute to the common good by responding to students and families that have felt the impact of disadvantage.

2.7.3 Preferential option for the poor.

The principle of the preferential option for the poor requires Catholics to stand side-by-side with the poor and the oppressed. Pope John Paul II (ACSJC, 2014) expressed the concerns as follows: “the community of Jesus’ followers, the Church, should stand side by side with the victims of injustice as part of its continuing mission through history to proclaim, celebrate and serve the gospel of Jesus Christ” (p. 38). This principle draws on the gospels, particularly Luke’s interpretation of the poor (Luke 6:20) as those who are excluded and who therefore experience God’s favour as exemplified in the Beatitudes (McKinney & Hill, 2010). The principle of the preferential option for the poor enables the concerns of those experiencing the impact of marginalisation to be central in decision-making and action (Canavan, 2009; Groody, & Gutierrez, 2013; Gruijters, 2016; Gutierrez, 2009; Scanlan, 2010). The preferential option for the poor fulfils a prophetic function by giving voice to the many people who are marginalized or vulnerable (Gutierrez, 2009). According to Dorr (2012), the preferential option for the poor is a commitment to oppose structural injustice and to be in solidarity with the poor. The Catholic Church needs to wrestle with the principle of the preferential option for the poor which has directed Catholicism in serving the needs of those in difficult circumstances in the past and continues to be relevant in the present (Collins, 2008).
Catholic schools are called to model themselves on the demands of the gospel and Christian life (McKinney & Hill, 2010). Catholic teaching since Vatican II has continually encouraged Catholic schools to fulfil their function “especially in caring for the needs of those who are poor in the goods of the world, or who are deprived of the assistance and affection of a family or who are strangers to the gift of faith” (Paul VI, 1965a, para. 30). Catholic schools are considered to have a double mandate in relation to the preferential option for the poor to avoid exclusion from and in the school (Preston, 2008, cited in McKinney & Hill, 2010). Exclusion from school through a lack of accessibility, truancy and illness and exclusion within the school because of the hidden costs of excursions, access to internet, and participation in extracurricular activities needs to be guarded against by leaders (Preston, 2008).

2.7.3.1 The challenge of the preferential option for the poor in Catholic education.

The preferential option for the poor poses challenges for Catholic education systems and Religious Congregations. The application of the principle means a series of personal or communal choices, made by individual, communities and corporate entities such as religious congregations (Dorr, 2012). This option is expressed as a choice for institutions to “disentangle themselves from servicing those at the top of society and instead to come into solidarity with those at or near the bottom” (Groody & Gutierrez, 2013. p. 99).

The challenges experienced by institutions who espouse values such as inclusion is to ensure those experiencing disadvantage are not excluded from education. The example of school fees that are prohibitive and exclude Catholic families from accessing Catholic education was used to illustrate this challenge (Canavan, 2009; Holman, 2014). Furthermore, National Census Data (2007, cited in Canavan, 2009) highlighted only one third of Catholic children from low social economic circumstances attended Catholic schools despite long standing policies that “no Catholic child will be denied a Catholic education through a genuine inability to pay fees” (Canavan, p. 174). Furthermore, Maddox (2014, cited in Gleeson, 2015), highlighted the challenges facing Catholic education in serving those experiencing the impact of disadvantage including children segregated by race, faith, culture and low income.

The enrolment data for students attending Catholic schools highlighted
further challenges. The National Catholic Education Commission presented enrolment data in Catholic schools that illustrated the under-representation of Indigenous students and children from low income households attending Catholic schools (NCEC, 2013). However, the ongoing effort by Catholic schools to strive for inclusivity was identified by the increasing enrolment trajectory of Indigenous students and students with disabilities enrolled in Catholic schools (NCEC, 2016).

Catholic educators are challenged to critique curriculum policy and practice as a means of responding to those in poor circumstances (Gleeson, 2015; Grace 2015). Leaders are encouraged to be constantly aware of factors and situations that contribute to the exclusion of families from Catholic schools and the potential for disadvantage to be experienced within the school (McKinney & Hill, 2010). Research into Catholic education found students identified teacher quality, curriculum issues, pedagogical practices and a lack of resources as contributing to inequalities (Storz, 2008). The capacity of leaders to critique curriculum policy has the potential to address issues such as the unequal distribution of resources, poverty, injustice and the denial of human rights (CCE, 2013). Furthermore, Catholic educators are challenged to ensure the promotion of Catholic education is not “aimed at establishing an elitist meritocracy” (CCE, 2014, p. 12). The principle of the preferential option for the poor provides significant challenges for leaders of schools in the Josephite tradition in ensuring inclusivity in all aspects of the school community.

2.7.3.2 Responding to those on the margins.

The literature on the preferential option for the poor referred to various ways Catholic school leaders could respond to those desiring a Catholic education. Several authors commented on Freire’s theory of conscientisation and pedagogy as a means of transforming the lives of the oppressed through education (Bergman, 2011; Darder, 2017; Eagan 2010). Freire’s (2014) pedagogy is grounded in the belief that a certain comprehension of the human being is required to understand education. Denzin (2014, cited in Freire, Freire & Barr, 2014) identified that “the pursuit of social justice within Freire’s transformative paradigm of critical reflection and action challenges prevailing forms on inequality, poverty, human oppression and injustice” (p. 88).

The ethical and moral aspects of hope are considered as core in a pedagogy
that seeks to transform inequalities through education (Denzin, 2014). Several authors identified pedagogy, building on Freire’s conscientisation, to assist leaders in developing the capacity for critical reflection in a faith context (Bergman, 2011). Pedagogy that included structural elements such as a critical socio-economic analysis, a focus on vision and values, a commitment from leadership and the use of symbols and rituals was seen as a way of transforming situations and people (Bergman, 2011). Responding to the needs of those on the margins is core to Catholic education: “in its ecclesial dimension the Catholic school has its root: it is a school for all, with special attention to those who are weakest” (CCE, 1998, para. This declaration reinforces necessity for a Josephite approach to education that is in solidarity in its service to those marginalised from and in Catholic education.

### 2.7.4 Solidarity.

Literature pertaining to the Catholic social justice principle of solidarity recognised that human beings are social by nature and can only grow and achieve potential in relationship with others (Catholic Church, 2008, para. 403; Cornish, 2009). According to Pope John Paul II, solidarity means “those who are more influential, because they have a greater share of goods and common services, should feel responsible for the weaker and be ready to share with them all they possess” (John Paul II, 1987, para. 39). Solidarity in a Christian anthropology is seen where one’s self interest is linked with and depends on others ‘self-interest’ or the organisations shared interest (McKinney & Sullivan, 2016).

The principle of solidarity is closely connected with other Catholic social justice principles such as the common good, the preferential option for the poor and human dignity (Beyer, 2014; Constable, 2012; Cremers, 2017). Several authors noted the scriptural basis from which solidarity is derived, namely: Matthew 10:40-42 and Luke 22:25-27, where a firm and persevering determination to commit oneself to the common good of all and the individual is a hallmark of Catholic social justice practice (McKinney & Sullivan, 2016). Solidarity is especially exemplified in the Beatitudes (Matthew 5: 1-11) as “the basic attitude of the disciple who receives the reign of God in solidarity with others” (Gutierrez, 2009, cited in Mele, 2005, p. 11). Solidarity enables the sharing of values and is urgently required in responding to the needs of the poor and those suffering (Beyer, 2014).
2.7.4.1 Solidarity in practice.

The Catholic social justice principle of solidarity has evolved over time; it is derived from earlier teaching on charity by Aquinas and has been influenced by feminist and liberationist perspectives on solidarity (Beyer, 2014). Concepts such as ethical behaviour, ethics of care, mutual service, co-responsibility, hopefulness and charity are synonymous with solidarity (Constable, 2012; Guitierrez, 2009). Solidarity is seen as a mutual sharing of gifts so that differences might enrich rather than divide (Copeland, 1995, cited in Beyer, 2014). Mutuality encouraged by solidarity enables members of a community to become more aware of their deep similarities and interdependence (Kampka, 2001, cited in Beyer 2014). Solidarity when applied in practice can be embodied in institutions as an immediate response to those experiencing marginalisation. Solidarity embodied in the formulation of policies provides a long-term impact (Beyer, 2014). The process whereby solidarity becomes embodied in institutions is illustrated in Figure 2.2.

Figure 2.2: The three movements and three aspects of solidarity (Adapted from Beyer, 2014, p. 16).

The embodiment of solidarity by communities and institutions ensures that solidarity “is not a feeling of vague compassion, rather solidarity encourages mutuality, the sharing of perspectives of those marginalised with those who seek to
empower them” (Beyer, 2014, p. 15). Solidarity enables those who are in oppressed circumstances to benefit from the common good. Studies conducted in Catholic schools in the United States of America found that Catholic schools were particularly successful in raising the academic achievement of students experiencing the impact of marginalisation and disadvantage (Bryk, Lee & Holland, 2009). Education that encourages students to develop reflective skills to apply in living alongside others and growing as human beings is critical in 21st Century learning (CCE, 2014).

Solidarity is a key principle in the Josephite tradition expressed as a ‘grassroots’ approach, emphasising the local context in which education takes place (Clark, 2015; Hull, 1995; McKenna, 2009). The inclusion of all students in a Josephite approach to education, without distinction, reflects the principle of solidarity. This ideal of human solidarity where no one is excluded by culture, race or religion grew from Mary Mackillop’s stance in offering “hospitality to strangers as a sacred obligation” (Hull, 1995, p. 26). Accordingly, the principle of solidarity needs to be kept in creative tension with the principle of subsidiarity, which deals with decision-making and participation (ACSJC, 2014).

2.7.5 Subsidiarity.

Catholic Church teaching emphasises subsidiarity as the capacity for the decision or action to be taken at the lowest level of an organisation or community (Benedict, XVI, 2009). Responsibility for decision-making and action should be kept as close as possible to those most directly affected by a decision or a policy (ACSJC, 2014). The Catholic Church considers “it is an injustice and at the same time a grave evil and a disturbance to the right order to transfer to the larger and higher collectivity functions which can be provided for by lesser and subordinate bodies” (ACSJC, 2014, p. 100). The collectivity referred to can mean smaller groups such as schools and families. Subsidiarity influences ethical behaviour and decision-making so that organisations can fulfil ethical standards (Mele, 2005).

Subsidiarity is closely connected to solidarity as every individual and group should contribute to the common good of the community to which it belongs. The principle of subsidiarity encourages a respect for and a responsible use of human freedom (Cremers, 2017). Subsidiarity assures alignment of an organisation with crucial ethical standards and requirements and by giving prominence to the
individual and small group, reinforces priority of people over process (Mele, 2005). Conditions must be created whereby people have the opportunity and freedom to participate, serve others, and receive help to develop their full potential (Guitan, 2015, cited in Cremers, 2017). The positive functions of subsidiarity, namely: empowerment and respect for differences are required in school communities (Kelley, 2009). Subsidiarity promotes mutually beneficial relationships that emerge from interactions amongst small groups and individuals, communities and associations that encourage and strengthen a community (Evans & Zimmerman, 2014; Kelley, 2009). The principle of subsidiarity affirms and safeguards the personal initiative and creativity of individuals, such as small groups, families and schools (ACSJC, 2014).

The principle of subsidiarity in the context of rural and regional communities requires attention when there is the potential for rural residents to be marginalised from centralised decision-making (ACSJC, 2014). In this instance the full participation of people living in rural and remote communities in relation to Catholic education needs to be safeguarded. The principle of subsidiarity affirms the importance of leaders in schools in the Josephite heritage valuing and building partnerships with families to encourage participation by all members of the community (Hull, 1995).

2.8 Summary
The review of literature pertaining to Catholic Social Justice Principles explored five key principles valid in a Josephite approach to education. The review explored the inherent dignity of the human person, specifically related to the dignity of the child. The literature highlighted that the dignity of the child demands a ‘pedagogy of listening’ as the basis for education, where grace and love overcome the brokenness that a child may experience. Several authors noted the role Catholic education has in nurturing dignity through an integral education where the synthesis of life, culture, faith and learning takes place.

The literature on the principle of the common good emphasised the communal effort in building relationships within Catholic schools where inclusion, diversity and pluralism are encouraged and nurtured. The articulation of mission and vision statements in Catholic schools was seen as critical in developing the common good. Furthermore, the significance of sacramentality, rituals, beliefs and symbols
were identified as a powerful means of nurturing the common good in Catholic schools. Literature pertaining to the preferential option for the poor considered Catholic education as embodying this principle by providing a voice to the marginalised and those in poor circumstances. The prophetic nature of the preferential option for the poor is evident in the capacity of schools to be aware of the possibility of exclusion from and within a Catholic school community. The review of literature identified challenges faced by Catholic schools in responding to those on the margins. The review considered pedagogical frameworks that could be used by leaders in responding to those experiencing the impact of disadvantage (Bergman 2011; Beyer, (2014); Darder, 2017; Eagan, 2010).

The literature on the principle of solidarity showed the close association with charity and emphasised the interconnectedness of this principle with all other Catholic Social Justice Principles. A process for embodying solidarity in structures, policies and procedures within an organisation was presented in the literature. Finally, literature on the principle of subsidiarity identified its focus in aligning the organisation with its ethical standards and requirements. The nature of subsidiarity, as the freedom to participate in decision-making, was emphasised as empowering students, teachers, families and school communities to serve and to develop their potential. Principals and their leadership teams in schools in the Josephite tradition have the richness of Catholic Social Justice Principles to draw upon in implementing a Josephite approach to education. The review of literature in this section influenced the formation of the specific research question:

- In what ways are the characteristics, features and beliefs about a Josephite approach to education evident in the leadership practice of Principals and their leadership teams?

What follows is a review of literature on Educational Leadership pertinent to the implementation of a Josephite approach to Education.

2.9 Educational Leadership

The literature on educational leadership theory is vast. Within this review of the literature, models of transactional, transformational and transcendental leadership are considered for their relevance in supporting a Josephite approach to education. The literature provides an overview of the characteristics of transactional leadership identified as the managerial and organizational aspects necessary for all leaders and especially early career leaders. The literature considers transformational leadership
as visionary leadership, setting direction and enabling creativity and excellence in achieving the objectives of the school community. The literature explores the theory of transcendental leadership with its twin notions of service and spirituality. Specifically, servant leadership enriched by the Gospel imperative and Catholic teaching is considered for its relevance in implementing a Josephite approach to education. The spiritual dimension of leadership is explored for the benefits it provides leaders in enhancing Catholic school identity and culture in the implementation of a Josephite approach to education.

2.9.1 Transactional leadership.

Transactional leadership occurs when leaders are involved in an exchange of rewards and benefits to followers who in turn fulfill agreements with leaders (Bass, 2000; Stone, Russell & Patterson, 2004). Transactional leadership is concerned with the “everyday transactions involved in the running of an organization” (Lavery, 2011, p. 4). The characteristics of transactional leadership include role clarification, compliance and the completion of tasks required for good management (Burns, 1978, cited in Shields, 2010). The transactional leader ensures that procedures by which people enter into agreements are clear and above board while taking into account the needs of others (Tay & Lim, 2012; Tully, 1999 cited in Lavery, 2011). The focus on structure and organization creates the means for leading others (Friedman, 2004; Marzano, Waters & McNulty, 2005). Transactional leadership is based on bureaucratic authority and relies on the leader bargaining over the individual interests of people going about their own separate ways (Sergiovanni & Starratt, 2002; Stone et al., 2004).

The strength of transactional leadership lies in a managerial approach that ensures administrative tasks are completed and that roles and responsibilities are clearly delineated (Covey, 2004; Lavery, 2011; Owens, 2004). Furthermore, transactional leadership is evident in situations where intense negotiations and difficult concessions are required (Van Oord, 2013). Transactional leadership is prevalent in systemic leadership creating a framework whereby school leaders have the capacity to respond in a democratic way with a degree of interdependence (Gronn, 2009). The capacity to demonstrate transactional leadership is a prerequisite for other leadership styles. According to Daresh (2006) a true leader needs to be able to manage people and tasks as the job must be done. “Transactional leadership
is considered to be significant in the formative phase of early career leaders (Glasson, 2014; Sayce & Lavery, 2016).

Principals and leaders in the beginning stages of their leadership career rely on transactional leadership as they learn to manage the day-to-day realities of school leadership (Glasson, 2014). According to Sayce and Lavery (2016) the managerial side of leadership caused most concern for beginning principals. While transactional leadership is necessary in schools, difficulties could eventuate if the structures and procedures of transactional leadership become the end point rather than the process of leadership (Lavery, 2011). The organisational expertise found in transactional leadership is necessary in the implementation of curriculum, policies and procedures (Marzano, Waters & McNulty, 2005). Transactional leadership is required for the effective running of Catholic schools including those in the Josephite tradition.

Early theories of leadership considered the differences between transactional and transformational leaders, suggesting leaders were either transactional or transformational (Burns, 1978, cited in Khanin, 2007). However, several authors have since emphasised the inter-relational aspect of both theories, whereby transactional leadership enriches transformational leadership. (Cardona, 2000; Fry & Kriger, 2009; Stone et al., 2004; Sultmann & McLaughlin, 2000). These authors considered leadership practice on a continuum with transactional leadership at one end and transformational leadership on another. What follows is an examination of the strengths of transformational leadership.

2.9.2 Transformational leadership.

Transformational leadership is generally associated with the visionary leader and is characterised by charisma as the leader’s ability to express “authority based on gifts of body and Spirit that inspire excitement and loyalty” (Smith & Piele, 2007, p. 57). Such leadership provides inspiration by taking the lead role in identifying and communicating a vision (Bass, 1985 cited in Smith & Piele, 2007). Transformational leadership requires engagement and connection between the leader and others in order to increase the level of motivation in both the leader and follower (Deluga, 1998; Ford & Ford, 1994, cited in Friedman, 2004; Lavery, 2011). The major goal and purpose of transformational leadership is to have followers engage in and support organizational objectives while transforming both people and the organization (Covey, 2004; Stone et al., 2004).
The primary behaviours of a transformational leader are derived from expertise, strength of relationships and the charismatic capacity of the leader (Stone et al., 2004). Features such as an idealised influence, inspirational motivation, intellectual stimulation and individualised consideration are core to transformational leadership (Bass, Avolio & Atwater, 1996; Groome, 1998; Stone et al., 2004). Transformational leaders rely on their charismatic, enthusiastic nature to garner influence and to motivate followers, thereby gaining a commitment to goals and shared vision in order to fulfill mission (Friedman, 2004; Stone et al., 2004). Transformational leadership enables innovation and creativity to thrive, the questioning of assumptions and the reframing of problems. The capacity for followers to collaborate in change processes is enhanced in this leadership model (Avolio & Bass, 2002, cited in Stone et al., 2004; Gronn, 2009; Simons, 1999 cited in Friedman, 2004).

2.9.2.1 Transformational leadership and shared vision.

The focus of transformational leadership is on the community’s vision in a way which secures commitment from members of the organisation (Beare et al., 1997, cited in Lavery, 2011). Transformational leaders are able to articulate a vision in an appealing manner, providing confidence and empowering followers by providing personal attention in order to achieve the vision (Bass, 2000; Yukl, 2012). The desires, beliefs, talents and ideas of members of the community are integrated into a change process, thereby inspiring followers to participate (Friedman, 2004). The creativity borne of transformational leadership inspires followers to strive for excellence. Sharing in the vision appeals to those who seek a moral solution and wish to make a difference in the organisation in which they work (Caldwell, Dixon, Floyd, Chaudoin, Post & Cheokas, 2012; Cardona, 2000). Transformational leaders nurture leadership in their followers by supporting and challenging them to develop their capacity as coaches, and mentors (Bass & Reggio, 2006, cited in Berkovich, 2016). Transformational leadership enables the fostering on an environment where relationships can be formed, and a climate of trust developed so vision can be shared (Bass, 1985, cited in Stone et al., 2004).

Transformational leadership has prevailed as a dominant paradigm in leadership theory and scholarship and cannot be understood apart from the context of 21st century schooling and education policy development (Leithwood, 1995;
Transformational leadership is used as a litmus test for successful leadership in education, measuring the effectiveness of education in various settings. It is a model of leadership that assists in understanding the role of principal; particularly the values, goals and demands of principalship (Berkovich, 2016; Stone et al., 2004). Transformational leadership is related to theories such as school reform, school effectiveness and instructional leadership. It is considered an appropriate form of leadership for school principals where shared vision and direction setting is required for leadership in a complex and rapidly changing educational environment (Crowther, 2016; Fullan, 2014; Lavery, 2011).

2.9.2.2 Transformational and transcendental leadership.

The benefits of transformational leadership are lessened if not integrated with other educational leadership models as transformational leadership is more concerned with end values, such as liberty, justice and equality (Berkovich, 2016; Shields, 2010). Since 2000, transformational leadership has been associated with transcendental leadership. Transcendental leadership builds on characteristics such as empowering, teaching, listening and influencing followers (Stone, et al., 2004). Transcendental leadership encompasses the spiritual and service dimension of leadership, integrating and extending the transactional and transformational theories of leadership (Cardona, 2000; Sanders, Hopkins & Geroy, 2003; Page & Wong, 2000). The defining factor in transcendental leadership is based in the inspiration and motivation of the leader (Lavery, 2011; Sendjaya, Sarros & Santora, 2008). What follows is an exploration of transcendental leadership and its twin notions of service and spirituality.

2.9.3 Transcendental leadership.

Transcendental leadership has at its core a sense of service and the notion of spirituality (Lavery, 2012; Rebore & Walmsley, 2009; Sanders et al., 2003). Transcendental leadership points to the spiritual dimension of leadership and is closely affiliated with Greenleaf’s description of the servant leader (Cardona, 2000; Greenleaf et al., 1996; Sanders et al., 2003). The desire of the leader to transcend one’s own self-interest for altruistic or transcendent motives is a key characteristic of this leadership model (Cardona, 2000; Nsiah & Walker, 2013; Sanders et al., 2003). Transcendental leadership is relationship-centred where leaders promote
unity by appealing to the intrinsic motivation of those with whom they work (Cardona, 2000; Sanders et al., 2003). Transcendental leadership exercised by Principals, in collaboration with their leadership team, supports a Josephite approach to education in serving the community (Lavery, 2011).

2.9.3.1 Service.

The notion of service is embedded in transcendental leadership and permeates all the actions of the leader (Lavery, 2012; Sanders et al., 2003; Sendjaya et al., 2008). Greenleaf (1973, cited in Frick, 2004) described “servants who nurture the human spirit as spirit carriers” (p. 11). The concept of service is integral and applicable to principals and leadership teams in schools in the Josephite tradition, where the needs of students and their families, especially those people who are in poor, marginalised or isolated circumstances are of the highest priority (D’Orsa & D’Orsa, 2015). The notion of service found in scripture and modelled on the life of Jesus who taught “the greatest among you must be your servant” (Mathew 23:11) situates Catholic educators as having a higher calling as they serve in the footsteps of Jesus Christ (Duignan, 2007). This Gospel tradition is central in Catholic schools and “plainly indicates that the most distinctive aspect of Jesus’ teaching on leadership is that a leader is essentially a servant” (Lavery, 2012, p. 39). For principals in Catholic Josephite schools, this Gospel tradition of service is a motivational force in encouraging leaders to serve.

2.9.3.2 Servant leadership.

The theory of servant leadership was constructed by Greenleaf (1991) and is characterised by listening, empathy, healing awareness, persuasion, stewardship, and a commitment to growing community and people (Black, 2010; Cardona, 2000; Sanders et al., 2003; Spears, 1998; Page & Wong, 2000). Servant leadership allows extraordinary freedom and trust for followers to exercise their own abilities (Stone, et al., 2004; Page & Wong, 2000). The first responsibility of the servant leader is to ensure people take precedence over tasks and there is an unconditional concern for the wellbeing of others (Bass, 2000; Davenport, 2015; Harvey, 2001 cited in Stone et al., 2004; Schafer, 2005, cited in Black, 2010). In turn, servant leadership focuses on reciprocation in a positive manner encouraging followers to develop their capacity to be better equipped to act out of their own values to serve others (Cialdini, 2001, cited
Servant leadership is built on the tenants of caring and ethical behaviour in community and hence it is an appropriate model of leadership in a Catholic school (Schafer, 2005, cited in Black, 2010). The use of power in a servant leadership model is different from other traditional uses of power as it relies upon the influence of self-giving without self-glory (McKenna, 1989, cited in Stone et al., 2003). In the model of servant-leadership the leader is a servant before anything else, having a deep desire to serve and fulfill others’ needs (Greenleaf, 1991, cited in Punnachet, 2009).

2.9.3.3 The evolution of servant leadership.

Several authors recognized that servant leadership developed by Greenleaf (1991) was constructed with virtually no reference to a religious framework (cited in Punnachet, 2009). Zenke and Lee (1993, cited in Spears, 1998) noted that while Greenleaf’s philosophy is unabashedly spiritual, it is finding a home in the secular world of corporation. Some authors expressed concern that because servant leadership is not originally based on a declared spiritual or religious framework it could pose a problem for Catholic educators and educational leaders whose mission is to provide service to the poor (Fairholm, 2013; Grace, 2015; Punnachet, 2009; Striepe & O’Donoghue, 2014). Increasingly, the contemporary literature on servant literature relates to the Christian faith and is also applicable in other religious faiths and traditions (Kurtz, 2003, cited in Sendjaya et al., 2008). What follows is an outline of the adoption of servant leadership in Catholic education.

2.9.3.4 Servant leadership and Catholic education.

The adoption of servant leadership has become increasingly an ideal model of leadership to aspire to in Catholic organisations (Gowdie, 2017; Nsiah & Walker, 2013; Punnachet, 2009). Various authors refer to servant leadership made manifest in Jesus Christ where Jesus’ name is synonymous with greatness. The paradox between servant and greatness is considered a focal aspect of servant leadership theory (Sendjaya & Sarros, 2002; Nuzzling, 2000 cited in Punnachet, 2009). The servant model of leadership is prevalent in biblical texts (Black, 2010).

As a spiritual leader Jesus Christ taught a ‘service’ philosophy as evidenced in Mark 13:12-15 where kindness and life are emphasised rather than power or force
Images and metaphors of servant leadership abound in Scripture such as the dramatic example of Jesus washing the feet of the disciples (Woolfe, 2003, cited in Black, 2010). Furthermore, reference to the servant leadership modelled by Jesus is evident during times of crisis: “Jesus did not lead from behind but stood out in the face of great adversity” (Black, 2010, p. 460). Servant leadership epitomised by Jesus Christ is reflected in St Paul’s understanding of love (Corinthians: 13:4-8) and hope (Romans, 15:4) which has the potential to encompass understanding and respect for each person within the school community. The tenacity, perseverance, strength, joy and hope evident in the Christian Scriptures are drawn upon by servant leaders in creating a vision for inclusive school communities (Nsiah & Walker, 2013; Patterson, 2003 cited in Punnachet, 2009).

Servant leadership as exemplified in the life of Jesus Christ has significant benefits for Principals and leaders in Catholic schools. Adopting the tenants of servant leadership aligns with the Catholic doctrine and traditions inspired by Jesus Christ, Christian teachings and the Catholic community (Gowdie, 2017; Lavery, 2011; Nsiah & Walker, 2013; Tay & Lim, 2012). The potential for Principals and leaders to draw on the model of servant leadership to determine their leadership behaviour can influences school climate and student achievement (Bass 2000 cited in Stone et al. 2004; Black, 2010; Lublin, 2001 cited in Punnachet, 2009).

A significant positive correlation between servant leadership and school climate is evident in studies by various authors (Marzano, Waters, & McNulty, 2005; Black, 2010). Simonson (2005, cited in Black, 2010) noted “Visionary, creative, knowledgeable, principled and inspiring leaders are vital to building and fostering positive school environments” (p. 437). Servant leadership provides an appropriate combination of faith and curriculum leadership and enables leaders to sculpt a vision of Catholic schools in providing a holistic education for all students (Black, 2010).

The disadvantages of Catholic educators adopting the ideal of servant leadership were seen to be minimal but nonetheless important. Research conducted by Nsiah and Walker (2013) identified the paradox, downsides and barriers experienced in the process of implementing servant leadership. Sharing control, being humble and the capacity to uplift others was identified as difficult for some leaders. The risk of manipulation and corruption of the concept of servant leadership
could occur if leaders were driven to achieve their vision while ignoring problems and misrepresenting the realism of their vision (Congar, 1990; cited in Stone, et al., 2004). Furthermore, the high degree of trust placed in followers could result in the use of service for manipulative purposes if gratification, recognition and applause were sought (Winston, 2002 cited in Punnachet, 2009).

The risk of followers focusing on the leader rather than responding in the service of others would be an abdication of the real responsibility of servant leadership (Conger, 1990 cited in Stone et al. 2004). A possible risk was observed where the qualities of servant leadership, such as nurturing, were seen as stereotypically feminine behaviours, leading to a greater expectation for servant leadership behaviours from female than male leaders (Hogue, 2016). Servant leadership also has the potential to be overshadowed by secular values, academic outputs and measurable performance to maximise student output (Punnachet, 2009).

Hence, nurturing and fostering the spiritual dimension of leadership is considered of utmost importance in the formation of Catholic school leaders (Black, 2010; Caldwell et al., 2012; Punnachet, 2009). What follows is an exploration of spirituality as it pertains to transcendental leadership.

2.9.3.5 The spiritual dimension of leadership.

Spirituality is critical to any understanding of transcendental leadership (Rebore & Walmsley, 2009; Sanders et al., 2003). Spirituality requires “the leader to act from the totality of who they are as human beings” (Rebore & Walmsley, 2009, 38). An evolving understanding of the spiritual dimension of leadership is characterized by a holistic, transcendent, intrinsic human capacity for meaning making (Gowdie, 2017; Harris, 1996; Rossiter, 2010; Tolliver & Tisdell, 2006). Harris (1996) noted: “spirituality is our way of being in the world in the light of the mystery at the core of the universe” (p. 75). Several authors noted the spiritual dimension as fundamental to a person’s wellbeing and that the inner process of transformation is necessary for Principals and leaders of Catholic schools (Gowdie, 2017; Kriger & Seng, 2005). The spiritual dimension of leadership is nurtured in prayer, contemplation and meditation, which are increasingly seen as factors that positively impact on leadership behaviour (Gowdie, 2017). The notion of spirituality provides Principals and their leadership teams with the opportunity to incorporate their faith, witness, values and understanding of service in their leadership of schools.
in the Josephite tradition (Lavery, 2012).

The spiritual dimension of leadership provides the motivational basis for servant leadership. It enables servant leaders to engage others in a profound and authentic way, so followers become the best leaders they can be (Sendjaya et al., 2008). The spiritual dimension encourages leaders to sacrifice their ego self in the service of a higher purpose (Barney, Wicks, Scharmer & Pavlovich, 2015; Parameshwar, 2005). It determines the capacity of leaders to become self and other aware and to question thought patterns and belief systems (Barney, et al., 2015). The benefits of a shift in awareness surrounding self and others is evident when a leader authentically responds to those experiencing the impact of marginalisation (Pavlovich & Krahne, 2012 cited in Barney, et al., 2015). The spiritual dimension integrated within servant leadership enables leaders to see things in new ways and to consequently have influence at the local and system level (Barney, et al., 2015; Camilleri, 2017; Engebretson, 2014).

The spiritual dimension of leadership was evident in the core values and desirable characteristics of servant leadership demonstrated by Principals (Herbst, 2003; Lublin, 2001 cited in Punnachet, 2009; Page & Wong, 2000). A respect for individuals, fairness, equality, caring for the wellbeing and holistic development of students and staff, integrity, humility, joy and honesty were identified as prevalent in the personal values of leaders (Day, et al., 2001 cited in Punnachet, 2009; Wheatley, 2007). A spirit of humility was one of the most desirable characteristics of the spiritual dimension of leadership. Humility was seen as a way of leading with the heart, stimulating trust and understanding (Punnachet, 2009). The benefits of leading with humility and witnessing to a religious commitment strengthened the Catholic identity of schools (Punnachet, 2009; Sanders et al., 2003; Page & Wong, 2000). The spiritual dimension of leadership provided both strength and consolation for leaders in meeting the challenges of leading in a globalised and fiercely competitive market culture (Cardona, 2000; Grace, 2015; Sanders et al., 2003).

2.9.3.6 Frameworks for spiritual leadership.

Several authors referred to frameworks to assist in embodying spiritual leadership in communities and workplaces (Barney, et al., 2015; Gowdie, 2017; Miller, Brown & Hopson, 2011; Rebore & Walmsley 2009; Sanders et al., 2003; Wheatley, 2007). One particular framework describing manifestations of the
spiritual approach to leadership is proposed by Rebore and Walmsley (2009). Three of these manifestations are particularly relevant to the leadership implemented by Principals and their leadership teams in Josephite schools. Firstly, a reflective paradigm enables leaders to constantly reflect on their decision-making in light of the needs of the people they serve. Secondly, transcendental leadership enables leaders to advocate for social justice to ensure people who are marginalised and isolated are included in education. Advocating for social justice is paramount in the Josephite tradition as a remedy against the enduring reality of poverty experienced by families (Hull, 1995). Thirdly, practicing the social justice principle of subsidiarity so that decisions are made at the lowest level is empowering for teachers, students and families.

An understanding of the social doctrine of the Catholic Church is essential for Catholic Principals as it provides “a spiritual standard for principals by which to judge their decision-making processes, their interaction with all members of the school and wider community” (Lavery, 2012, p. 40). The spiritual reflection, action and post conventional level of moral development inherent in transcendental leadership, linked with the internal motivation of the leader to serve, incorporates and extends the features of transactional and transformative leadership (Cardona, 2000; Duignan, 2007; Lavery, 2012; Sanders, et al., 2003).

2.10 Summary

The review of literature on Educational Leadership explored three models of leadership relevant to leadership in the Josephite tradition. Transactional leadership was considered for the benefits it provides leaders, particularly early career leaders. Transactional leadership characterised by compliance, organisation, structures and the exchange of benefits were necessary in implementing policies and procedures in schools. The review of literature on transformational leadership highlighted the capacity of the leader to establish a shared vision, to engage and connect with staff in such a way as to inspire and empower them in achieving the vision of the school community. Transformational leadership impacts on the individual and the organisation, building leadership capacity and is considered an appropriate and effective model of leadership for Catholic school principals and leaders. The motivation and focus of transcendental leadership were highlighted in the twin notions of service and spirituality.
The theory of servant leadership posed by Greenleaf (1973), reinforced by the Gospel imperative and Catholic teaching was seen to be most effective in influencing Catholic school culture, climate and most importantly student learning outcomes. The notion of spirituality was explored as a means of supporting servant leaders in the role of ‘meaning making’ and becoming both self and other aware while considering assumptions and beliefs. Transcendental leadership with the integration of the characteristics of transactional leadership and transformational leadership was seen to be a most effective model of leadership for Principals and their leadership teams in implementing a Josephite approach to education in the context of the communities in which they serve. The review of literature in this section influenced the formulation of the specific research question:

- In what ways are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their leadership teams?

What follows is the conclusion of the review of the literature that influenced the formulation of the three specific research questions:

- What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics of the Josephite tradition in their respective school community?
- What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics underlying a Josephite approach to leadership in the context of the school community in which they serve?
- In what ways are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their leadership teams?

2.11 Conclusion

The review of literature on Educational Leadership in the Josephite Tradition examined the influence and interplay among four themes. First, the Josephite Heritage, its spiritual tradition and charism, were seen to underpin an approach to Josephite education. Second, Leadership in Catholic Education considered the integration of faith, theology and spirituality as components necessary for mission. Third, Catholic Social Justice Principles were seen to underpin and strengthen Catholic leadership, seeking to serve those experiencing the impact of marginalisation. Finally, Educational Leadership models of transactional,
transformational and transcendental leadership provide a comprehensive framework for leaders to implement a Josephite approach to education. The following chapter presents the research plan used in the inquiry.
Chapter 3
Research Plan

3.1 Introduction

The review of literature in Chapter Two focused attention on four themes, namely: The Josephite Heritage; Leadership in Catholic Education; Catholic Social Justice Principles; and Educational Leadership. Three research areas developed from the review of literature and formed the focus of the study. These research areas were: the characteristics of the Josephite tradition identified by Principals and their respective leadership teams; how these characteristics were identified as underlying a Josephite approach to leadership; about the ways these characteristics were evident in the leadership practice of Principals and their leadership teams.

This chapter is concerned with the research plan employed to explore the overarching two-fold research question of the study: firstly, what do Principals and their leadership team understand by the concept of a Josephite approach to education? Secondly, in what ways do Principals and their leadership teams implement a Josephite approach to education in the context of the school community in which they serve? A constructivist approach was deemed appropriate for this research as it suited the objective of this study. The type of research within constructivism is qualitative in nature and focuses on the meaning-making activity of the individual mind (Patton, 2015). In qualitative research, the researcher examines the socially constructed nature of reality and the situational boundaries that shape the story and, therefore, is an appropriate approach for the current research. Denzin and Lincoln (2011) noted that researchers may be involved in interviewing, observing and analysing data, which are activities central to qualitative research. These features suited the objective of this study in exploring the concept of a Josephite approach to education and the ways in which it is implemented in schools conducted in the Josephite tradition. The Research Design adopted for this study was constructivist, interpretivist and planned around a case study design. The outline of the Research Plan is presented in Table 3:1.
Table 3.1

Overview of Chapter Three: Research Plan

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3.2 Theoretical Framework

The theoretical framework of a research inquiry relates to the philosophical basis on which the research is designed. The theoretical framework establishes a connection between the theoretical and practical aspects in an inquiry (Creswell, 2013). Crotty (1998) identified four interconnected elements of a research process: methods, methodology, theoretical perspective and epistemology. Methods are techniques that are used for data collection and analysis. Methodology explains the strategy, plan or design behind the researcher’s choice of methods. Theoretical perspective is the “philosophical stance” (Crotty, 1998, p.3) behind the selection of methodology. Epistemology is the theory of knowledge embedded in the theoretical
perspective and thereby in the methodology (Crotty, 1998). Figure 3.1 illustrates the theoretical framework underpinning this research.

![Figure 3.1: Theoretical framework for the research study (Adapted from Crotty, 1998, p. 4).]

### 3.3 Epistemology

Epistemology is an area of philosophy that is concerned with the creation of knowledge that focuses on how we know what we know or what are the most valid ways to reach the truth (Neuman, 2014). Crotty (1998) stated that epistemology “deals with the nature of knowledge, its possibility, scope and general basis” (p. 8). Epistemology provides a philosophical grounding that suggests people construct their own understanding of reality based on their interactions with their surroundings (Denzin & Lincoln, 2011).

The epistemological approach for this study is constructivism. In constructivist research, the researcher positions him or herself as a co-constructor of knowledge, of understanding and interpretation of the meaning of lived experiences (Guba & Lincoln, 1981). Social constructivists acknowledge that individuals construct meanings, which can be quite complicated, varied and multiple, leading the researcher to look for complexities of views (Creswell, 2013). The researcher accepts that his or her own background often shapes interpretation and acknowledges how interpretation is informed by personal and cultural experiences (Creswell, 2013). This study explored the concept of a Josephite approach to education and the ways in which this approach is implemented in schools conducted in the Josephite tradition. A constructivist epistemological approach suited the researcher’s position as a Sister of St Joseph with experience as Principal of schools conducted in the Josephite tradition in South Australia.
3.3.1 **Constructivism.**

Constructivism is typically seen as an approach to qualitative research (Creswell, 2013). For instance, Crotty (1998) identified three distinct assumptions in considering constructivism as a form of qualitative research. Firstly, constructivism focuses on the meaning-making activity of individual minds and suggests that each one’s way of making sense of the world is as valid and worthy of respect as any other. Secondly, humans engage with their world and make sense of it based on their historical and social perspectives, hence the context and setting of the participants’ is important to the qualitative researcher. In turn, the researcher’s own experience and background influences the interpretation of the information. Thirdly, meaning is mostly derived from the social settings and the interactions that take place in a community. Hence, the qualitative researcher generates meaning from the data collected in field interviews capturing, appreciating, and making sense of diverse perspectives (Patton, 2015).

The role of the researcher in a qualitative study is to make sense of the world, and how groups construct meaning around a particular social phenomenon (Creswell, 2013; Marshall & Rossman, 2011). Qualitative research is personal as the researcher collects participants’ meaning and brings personal values into the study, reviews the context, validates the accuracy of findings and makes interpretation of the findings. (Creswell, 2009; Patton, 2015). The researcher “understands that the research is an interactive process shaped by her or his personal history, biography, gender, social class, race and ethnicity” (Denzin & Lincoln, 2011, p. 3). The qualitative researcher focuses on individual meaning, and the importance of rendering the complexity of a situation (Creswell, 2009). In this study, the qualitative approach to research enabled an understanding of human experience through the reciprocal communication between the researcher and the six Principals and their respective leadership teams (Mills & Birks, 2014). The researcher’s experience as a former Principal of schools in the Josephite tradition has enabled her to have insight into the Principals’ perspective and professional application of an approach to education in the Josephite tradition.

3.4 **Theoretical Perspective**

The theoretical perspective offers a philosophical framework or stance which justifies and explains the choice of methodology (Crotty, 1998). The theoretical
perspective of interpretivism, specifically that of symbolic interactionism, has been chosen for this research as the interpretivist approach emphasises social interaction as the basis for knowledge (O’Donoghue, 2007). This research was designed to gather descriptive data from Principals and their respective leadership teams to explore how they identified the characteristics of the Josephite tradition, specifically in underlying an approach to leadership in the Josephite tradition. Furthermore, the inquiry explored how these characteristics are evident in the leadership practices of Principals and their respective leadership teams.

3.4.1 Interpretivism.

An interpretive approach within qualitative research focuses on a reconstructed understanding of the social world (Denzin & Lincoln, 2011). Cohen, Manion, and Morrison (2011) identified the features of interpretivism as a set of diverse human meanings and understandings that arise from particular contexts and situations. The aim of an interpretivist researcher is to go beyond the descriptive data, attach significance to what is found, make sense of the findings, offer explanations, make inferences and consider the meaning (Patton, 2015). Interpretivism is underpinned by the philosophical assumption that people derive their own understanding of reality and construct meaning from interactions and surroundings. Thus, these individual constructions result in the existence of multiple perspectives of reality (Guba & Lincoln, 1981). This research has endeavoured to explore, interpret and understand how Principals and their respective leadership teams identify the characteristics of the Josephite tradition, how these characteristics underpin leadership in a Josephite approach to education and the ways these characteristics are evident in the leadership practices of Principals and leadership team participants.

3.4.2 Symbolic interactionism.

Within interpretivism there are different approaches to understanding human action. One such approach is symbolic interactionism, which underlies the theoretical perspective to this inquiry. Derived from the work of Mead (1934), a symbolic interactionist approach involves the process of interaction between individuals to interpret how meanings are constructed (O’Donoghue, 2007). The symbolic interactionist is drawn to qualitative inquiry as the only real way of
understanding how people perceive, understand, and interpret the world (Patton, 2015). Crotty (1998) stated the symbolic interactionist is concerned with:

Those basic interactions whereby we enter the perceptions, attitudes and values of a community, becoming persons in the process. At its heart is the notion of being able to put ourselves in the place of others (p. 8).

At the core of symbolic interactionism is the premise that human beings act towards phenomena based on the meaning they have for that phenomena (Bryman, 2008). These meanings are derived from social interactions with others and are personal to the individual. The continuous process of meaning making is subject to change. In this manner, individuals are constructors of their own action (Cohen et al., 2011). The meanings of things are managed and transformed through an interpretive process that people use to make sense of and handle the object that constitute their social world. The world of subjective meaning requires symbols that are produced and represented through language, gestures and signs that convey meaning (Neuman, 2014).

Consistent with the symbolic interactionist approach, this research undertook to explore the concept of a Josephite approach to education and the ways in which it is implemented in schools conducted in the Josephite tradition. The data were collected from the personal and situational context of the six Principals and their respective leadership teams. The intention was to explore the experiences of the six Principals and of their respective leadership teams as to ways they identified and implemented the characteristics of the Josephite tradition and constructed meaning in the everyday activities. Furthermore, data from a core group of Sisters of St Joseph provided a reference for meaning-making by Principals and leadership team participants. Considering the research from the focus of interpretivism and the filter of symbolic interactionism, the methodology chosen for this study was a case study design. The methodology supporting this research will now be discussed.

3.5 Methodology

Denzin and Lincoln (2011) defined methodology as the beliefs that shape how the researcher sees the world and acts in it and gains knowledge of it. Methodology provides a way to research complex, multiple realities and offers a rationale for the organisation and conduct of the research (Cohen et al., 2011). In an interpretivist perspective, methodology is the process of seeking out new
knowledge, usually undertaken with naturalistic methods such as interviews, observations and the analysis of existing material (Denzin & Lincoln, 2011). Case study is the chosen methodological approach for this research.

3.5.1  Case study.

Yin (2014) defined case study as a contemporary phenomenon in its real-world context, particularly when the boundaries between phenomenon and context might not be so clear. The case study design and data collection features of case study focus on the variables that are likely to exist in the research (Yin, 2014). Furthermore, Yin (2014) contended that case study approach should be considered when the present circumstances and the ‘how and why’ of a social phenomenon were under investigation. According to Yin (2014) case study design enables the inquirer to gain a ‘real-world’ perspective on life by asking questions that provide extensive and in-depth description of the particular social phenomena. Case study as a methodology accepts that there are many variables operating in a single case and therefore requires more than one tool for collecting data such as one-to-one interviews, focus group interviews, field notes and document search. The strengths of case study are that it focuses on individuals and groups of actors with the researcher integrally involved in the case (Cohen et al., 2011). Additionally, case study gives attention to the subtlety and complexity of the case in its own right. Cohen et al., (2011) advocate that contexts are unique and dynamic; hence, case study investigates the real-life, complex dynamic and unfolding interaction of events, human relationships and other factors in a unique instance.

3.5.2  Instrumental case study.

Stake (2010) defined three types of case study namely: intrinsic, collective and instrumental. Intrinsic case study is undertaken in order to understand the particular case. A collective case study explores multiple cases and focuses with and across cases to jointly examine a phenomenon (Punch, 2006). Whereas, an instrumental case study examines a particular case in order to gain insight into a phenomenon (Stake, 1994 cited in Cohen et al., 2011). According to Patton (2015) instrumental case study seeks to provide further insight into a precise issue where the case is of secondary importance. An instrumental case study underpins this study in exploring the phenomena of a Josephite approach to education.
Instrumental case study is used to explain deeper issues by “going beyond the case” (Patton, 2015, p. 259). This type of case study includes a selection of multiple cases of a phenomenon for the purpose of generating findings that can be used to inform changes in practice, program and policies. Furthermore, instrumental case study seeks to provide further insight into the case rather than understand a particular situation. Stake (2006, cited in Patton, 2015) noted that an instrumental case study can be used when the researcher wants “good opportunities to learn about complexity and contexts” (p. 295). Such an approach has the potential to provide the researcher with insight into an issue or assists them to refine a theory (McGloin, 2008).

Specifically, an instrumental case study was used to research those ways the concept of a Josephite approach to education was understood and evident in the leadership practices of Principals and their respective leadership teams across six schools. The conclusions drawn from this instrumental case study research have the potential to strengthen the concept of a Josephite approach to education by informing the Sisters of St Joseph and Catholic Education South Australia in the appointment, induction and formation of school leaders. The concerns and defence of using case study methodology will now be discussed.

### 3.5.3 Concerns and defence of case study methodology.

The methodological structure of case study poses various concerns that require a defence of both strengths and weakness’ (Cohen et al., 2011). The main concerns of case study methodology are generalisability, subjectivity, methodological rigour, quality of the research and the volume of information. These five concerns will now be discussed.

The findings from case study research can have limited generalisability (Nisbet & Watt, 1984 cited in Cohen et al., 2011). Yin (2009) counteracted this concern by claiming that case studies can help to generalise to a broader theory when evidence is presented. Furthermore, Cohen et al. (2011) noted that case study included a number of variables for providing the researcher with the opportunity to collect evidence so that generalisability can be demonstrated. For example, generalisations can be made from a single case to a theoretical generalisation when other readers or researchers see their application (Nisbet & Watt, 1984 cited in Cohen et al., 2011).
Nisbett and Watt (1984, cited in Cohen et al., 2011) argued that because the data collected in case study research is not open to cross-checking, there is a risk of the researcher being selective or biased. Yin (2009) noted, however, that case study enables researchers to immerse themselves in subjective phenomena and form close relationships with their research participants. Moreover, Denzin and Lincoln (2011) considered case study contains no greater bias toward verification of the researcher’s preconceived notion than other methods of inquiry. Constructs such as ‘member checks’ whereby the data and interpretations are shared with participants are considered a worthy means of validating the data (Marshall & Rossman, 2011).

There are certain concerns regarding the methodology in case study research, such as the consistency of data collection and analysis. Planning the research questions to achieve what the researcher intends to do during implementation of the case study will address these concerns (Marshall & Rossman, 2011). The research design in this study included a pilot of the one-to-one interview and focus group interview questions. The pilot of the interview guide will be considered in more detail in Section 3.6.1.3. Further reference to methodological rigour will be considered in Section 3.9.

Guba and Lincoln (1981) contended that it is necessary to judge and establish the quality of qualitative research through the method of trustworthiness. Guba and Lincoln (1985, cited in Patton, 2015) noted a variety of means to ensure trustworthiness of the research: credibility, dependability, confirmability and transferability. Credibility is the internal validity of the research and deals with the question of how congruent the findings are with reality (Shenton, 2004). Dependability refers to the issue of reliability, particularly if the research processes can be repeated in future research. The concept of confirmability is the researchers concern to be objective by taking steps as far as possible to ensure the results are those of the experience of the participants rather than the preferences of the researcher (Patton, 2015). Transferability refers to the extent to which the findings of one study can be applied to other situations (Merriam & Tisdell, 2015). The elements of trustworthiness, namely, credibility, transferability, dependability and confirmability applied to this study will be addressed in Section 3.8.

The final concern of case study is that the methodology is time consuming and can result in a large volume of collected information (Yin, 2009; Marshall & Rossman 2011). However, Creswell (2009) noted the research design provides the
researcher with data collection steps including setting the boundaries for the research. These steps include collecting data from semi-structured interviews and observations, documents and visual materials, and establishing protocols for recording this information. In this research, data collection entailed semi-structured interviews, field notes, document search and a researcher-generated journal. The research design phase in this instrumental case study limited the study to six schools to ensure manageability in the collection and amount of data. The methodological rigour to support this research study will be addressed in Section 3.9.

3.6 Method

A research method is the practice used to gather and analyse the research data (Creswell, 2009). The methods of data collection used in this research were in-depth semi-structured interviews, document search, field notes and a reflection journal. These four data collection methods will now be discussed.

3.6.1 Semi-structured in-depth interviews.

Qualitative researchers rely extensively on in-depth interviewing as one of the most important sources of case study evidence (Marshall & Rossman, 2011; Yin, 2014). The semi-structured interview combines a pre-determined set of open questions providing the opportunity for the interviewer to follow topical trajectories to see, understand, and explore responses further (Cohen et al., 2011). Creswell (2009) advocated the use of an interview protocol in conducting the interview, particularly the digital recording of the interview. In this research, permission was sought and gained for a digital recording to enable an accurate transcription of the interview. Bryman (2012) recommended that the procedure of recording and transcribing interviews is advantageous in that it ensures the accuracy of the data collection and allows a thorough examination of what people say during the interview. Both one-to-one and focus group interviews were used to collect data from Principals, their respective leadership teams and the Sisters of St Joseph.

3.6.1.1 One-to-one interviews.

Semi-structured one-to-one interviews were utilised in this instrumental case study as a means of providing a voice for the six Principals. One-to-one interviews are a focused, two-way conversation which allow new ideas to emerge during the
interview with topical questions providing reliable, comparable qualitative data (Cohen et al., 2011). The interview with each of the six Principals was conducted in the respective Principal’s office at a time mutually convenient to the Principal and researcher. Prior to the interview, the Principals were provided with a participant information sheet with contextual information on the research study (Appendix A), the consent form (Appendix B) and interview guide (Appendix C). The Principals were informed that they could withdraw from the research at any point of time without any negative consequences. The interviews were between 50 to 60 minutes in length. Transcriptions were made available to the Principals, thus allowing verification of the information and clarification of any moot points. Member checking enables the participants to correct the researcher’s representation of their world and is a necessary component of qualitative research adding to the credibility of the data (Marshall & Rossman, 2011). No adjustments were required to the transcripts following the member checking process.

3.6.1.2 Focus group interviews.

Focus group interviews make data collection a social experience, increasing the meaningfulness and validity of findings as perspectives are formed and sustained in social groups (Patton, 2015). The advantage of using focus group interviews in an instrumental case study is the cost effectiveness of data collection in addition to the diverse perspectives gained from the participants. The interaction among participants enhances data quality, while the researcher is also attentive to the silences and avoidance of topics as a means of identifying areas of tension or uncertainty (Cohen et al., 2011; Patton, 2015). In this study data were collected from two different focus groups, namely; the leadership teams in each school and a focus group of Sisters of St Joseph. The data gathered in the six focus group interviews with leadership team participants provided multiple perspectives and comparative data about how Principals and their leadership teams understand and implement a Josephite approach to education in distinctive settings. The focus group interviews took place at the schools and in most cases were conducted on the same day following the interview with the Principal. One focus group interview did occur on another day to that of the Principal due to the Principal’s availability. Leadership team participants were provided with a consent form (Appendix D) and interview guide (Appendix E). Leadership team participants were informed that they could
withdraw from the research at any point of time without any negative consequences. However, they were informed that individual data could not be withdrawn following completion of the focus group interview. The focus group interviews were between forty-five and sixty minutes in length. Transcriptions were made available to the leadership team participants for member checking to verify the collected data were an accurate record of the interview.

A focus group interview with the Sisters of St Joseph gave voice to the Sisters’ perspective in the data collection process. The focus group interview was conducted in an office space. The participating Sisters of St Joseph were provided with a consent form (Appendix F), and interview guide (Appendix G), prior to the focus group interview. Similarly, the Sisters were informed that they could withdraw from the research at any point of time without any negative consequences but that their individual data could not be withdrawn following completion of the focus group interview. A transcript of the Sisters’ focus group interview was provided to participants to allow for verification of the information and clarification of any details.

3.6.1.3 Interview guide.

The use of an interview guide to direct the questions ensured that there was consistency of the interview process in both the one-to-one interviews and the focus group interviews. The interview guide provided structure to enable the data to be context sensitive and assisted both the interviewer and interviewees to enter into a dialogue (Marshall & Rossman, 2011; Patton, 2015). The interview guide gave topics or subject areas within which the interviewer was free to explore, probe and ask questions that elucidated and illuminated the specific research questions. The interview guide ensured there was consistency in the questions used with all Principals and their respective leadership teams, thus aiding the analytical process.

The preparation of the interview guide and the proposed questions included pre-testing and evaluation of the semi-structured interview questions. Creswell (2009) and Marshall and Rossman (2011) advocated piloting the interview guide as a process to refine research instruments in foreshadowing research problems and limiting wastage in the collection of data. Moreover, the process of piloting the interview questions enhances the trustworthiness of the collected data. In this inquiry, the researcher piloted the interview guide with a primary and a secondary
Principal and representative members of two different leadership teams in schools in the Josephite tradition. The Principals and leadership team members were not involved in the research. Within these pilot studies, one Principal had both rural and metropolitan experience. The leadership team members had varying roles as members of leadership teams in metropolitan schools. Additionally, the pilot questions were trialled with a Sister of St Joseph who was not a participant in the Sisters’ focus group.

Through the process of piloting the interview schedule, the researcher was able to refine and clarify the questions, thus ensuring the questions were clear and appropriate for the research. The final refined interview guides were used for the semi-structured interviews of Principals, their respective leadership team and the Sisters of St Joseph focus group. Appendix C provides the explicit questions that formed the interview guide for Principals. Appendix E provides the explicit questions that formed the interview guide for the leadership teams. Appendix G provides the interview guide for the Sisters of St Joseph focus group. The interview guide questions that were developed for Principals and leadership team participants were drawn from the three specific research questions. Table 3.2 highlights the relationship between the specific research question and the explicit interview guide questions.

Table 3.2

<table>
<thead>
<tr>
<th>Specific Research Question</th>
<th>Interview Question</th>
<th>Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRQ1 What do Principals and their leadership teams in schools conducted in the Josephite</td>
<td>Principals: 1,2,3</td>
<td>Principals: 1,2,3,4</td>
</tr>
<tr>
<td>tradition identify as the characteristics of the Josephite tradition in their respective</td>
<td>Leadership teams: 1,2,3,4</td>
<td></td>
</tr>
<tr>
<td>school community?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SRQ2 What do Principals and their leadership teams, in schools conducted in the Josephite</td>
<td>Principals: 4,5,6,7</td>
<td></td>
</tr>
<tr>
<td>tradition, identify as the characteristics underlying a Josephite</td>
<td>Leadership teams: 5,6,7</td>
<td></td>
</tr>
</tbody>
</table>
SRQ3
In what ways are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their respective leadership teams?

Principals: 8, 9, 10, 11
Leadership teams: 8, 9, 10, 11

3.6.2 Document search.

The importance of a document search is to corroborate and augment evidence from other sources (Yin, 2014). An advantage of a document search is that it does not disrupt ongoing events, as materials can be gathered without disturbing the setting, materials can be reviewed repeatedly and when combined with interviews and observations can provide a means of triangulation (Marshall & Rossman, 2011; Punch, 1998; Yin, 2014). In this study examples of key documents included:

- Vision and Mission Statements of each of the four school communities in South Australia.
- CESA - Continuous Improvement Framework
- Local school publications that provide information relating to the context of the participating principals and their leadership teams.
- Catholic Church documents relating to Catholic Education in the Port Pirie Diocese and Archdiocese of Adelaide; strategic plans
- CESA - Position Information Documents and other related materials regarding the role of Principal and members of leadership teams.
- Correspondence between participating schools and the Sisters of St Joseph of the Sacred Heart.
- Annual School Reports

3.6.3 Field notes.

Creswell (2013) outlined the protocols for observation in qualitative research as a means of maintaining the research instrument. The researcher utilised field notes to record unstructured observations during semi-structured in-depth interviews. Marshall and Rossman (2011) noted that observations recorded as field notes provide concrete descriptions, enabling the researcher to use visual, auditory and other senses to “explain behaviour and relationships in complex social settings” (p.
During both the semi-structured one-to-one interviews and the focus group interviews, notes were recorded to emphasise the dynamic in the interview, noting any gestures, tone, language or emotions expressed by Principals, leadership team participants and Sisters.

### 3.6.4 Reflection journal.

A reflection journal provides the researcher with the means of reflecting on biases, values and personal background when collecting and interpreting data. The journal enables the recording of reflections on primary material when considering people and situations that are under study (Creswell, 2009). The journal provides the opportunity for reflection on secondary materials such as readings and document search. Furthermore, the journal was maintained by the researcher throughout the data collection phase to foster self-reflection and to assist in analysing data when reflecting on the researchers’ own emotional response, passion and biases (Marshall & Rossman, 2011). The reflective aspect of the journal reminded the researcher to be self-aware of her own perspective, voice and how one thinks (Patton, 2015).

### 3.7 Research Participants

The participants in this study fall into three categories namely: Principals of the six schools; the respective leadership team in each school; and a core group of Sisters of St Joseph. Purposeful sampling (Patton, 2015) was the design strategy used in this study to select the schools from which the participants were invited. Purposeful sampling offers in-depth insights about a phenomenon, in this instance, a Josephite approach to education. Two aspects of purposeful sampling were used: criterion-based case selection and variation sampling. Criterion-based selection is predicated on important criteria whereby research participants all meet the criteria to be studied (Patton, 2015). In this study, participants were invited from six schools conducted in the Josephite tradition with specific leadership roles and responsibilities namely, Principals and their respective leadership teams. The Principals as research participants, their gender, the type of school for which each is responsible, as well as the location and enrolment of the school are summarised in Table 3.3.
Table 3.3

*Principals of the Six Schools as Research Participants*

<table>
<thead>
<tr>
<th>School</th>
<th>Principal</th>
<th>Type</th>
<th>Enrolment</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Female</td>
<td>Reception-Yr.12</td>
<td>706</td>
<td>Regional</td>
</tr>
<tr>
<td>2</td>
<td>Female</td>
<td>Reception-Yr.12</td>
<td>456</td>
<td>Regional</td>
</tr>
<tr>
<td>3</td>
<td>Female</td>
<td>Reception-Yr.7</td>
<td>517</td>
<td>Metropolitan</td>
</tr>
<tr>
<td>4</td>
<td>Male</td>
<td>Reception-Yr.7</td>
<td>222</td>
<td>Metropolitan</td>
</tr>
<tr>
<td>5</td>
<td>Female</td>
<td>Reception-Yr.7</td>
<td>85</td>
<td>Regional</td>
</tr>
<tr>
<td>6</td>
<td>Female</td>
<td>Yrs.8-Yr.12</td>
<td>927</td>
<td>Metropolitan</td>
</tr>
</tbody>
</table>

Variation sampling is the purposeful selection of a wide range of cases to document diversity and identify important common patterns. In this study participants in the research were drawn from primary, secondary and combined schools conducted in the Josephite educational tradition. Furthermore, the schools from which the participants were drawn represented a variety of contexts, locations and size. Variation sampling allowed the researcher to identify and document common patterns and diversity in the data collected from Principals and their respective leadership teams from a variety of contexts and backgrounds. Furthermore, a Sisters of St Joseph focus group of four former Principals was formed to provide a reference for the comparison of data collected from Principals and leadership team participants.

The six leadership teams were comprised of participants nominated by the Principal of the respective school. Hence, the composition of each leadership team differed slightly according to the context, priorities, location and size of the school. In total, twenty-seven leadership team participants, responsible for varying roles, contributed to the data collected in leadership team focus group interviews. Table 3.4 provides a summary of the various roles held by leadership team participants.
Table 3.4

Example of Roles Held by Leadership Team Participants

<table>
<thead>
<tr>
<th>School</th>
<th>Roles Held by Leadership Team Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Deputy Principal, Religious Education Coordinator, Business Manager, Director of Teaching and Learning.</td>
</tr>
<tr>
<td>2</td>
<td>Deputy Principal, Director of Student Wellbeing, Director of Middle Years, Director of Senior Years, Administration Coordinator, Inclusive Learning Coordinator.</td>
</tr>
<tr>
<td>3</td>
<td>Deputy Principal, Assistant Principal Religious Identity and Mission, Director of Early Years Learning</td>
</tr>
<tr>
<td>4</td>
<td>Assistant Principal Religious Identity and Mission, English Additional Language Key Teacher, Religious Education Coordinator, Curriculum / Special Education Coordinator, Chaplain.</td>
</tr>
<tr>
<td>5</td>
<td>Religious Education Coordinator, Bursar, Key teacher</td>
</tr>
<tr>
<td>6</td>
<td>Director of Catholic Identity, Business Manager, Deputy Principal Wellbeing, Deputy Principal Teaching and Learning, Director of Students, Coordinator Inclusive Learning.</td>
</tr>
</tbody>
</table>

The Sisters of St Joseph focus group was comprised of four Sisters with extensive experience as educators in a Josephite approach to education. The four Sisters were all former Principals of Josephite schools in South Australia. The Sisters’ were purposefully selected as they were former Principals of primary, secondary and combined schools in rural and metropolitan South Australia.

3.8 Trustworthiness

Guba and Lincoln (1981) highlighted the necessity of establishing and assessing quality of research. Within qualitative research, this process is called trustworthiness. Guba and Lincoln (1981) posited four constructivist criteria for trustworthiness, namely: credibility, transferability, dependability and confirmability. Table 3.5 details processes used in this inquiry to establish trustworthiness.
Establishing Trustworthiness

Table 3.5

<table>
<thead>
<tr>
<th>Section</th>
<th>Quality Criteria</th>
<th>Research Techniques</th>
</tr>
</thead>
</table>
| 3.8.1   | Credibility      | Researcher’s background and experience  
|         |                  | Triangulation  
|         |                  | Prolonged engagement  
|         |                  | Member checks  
|         |                  | Researcher’s reflective commentary |
| 3.8.2   | Transferability  | Purposeful sampling |
|         |                  | Detailed description of phenomena |
| 3.8.3   | Dependability    | Case study protocol  
|         |                  | Audit trail-interview guide and pilot of questions  
|         |                  | Research design and reflection on the limitations of the research |
| 3.8.4   | Confirmability   | In-depth methodological description  
|         |                  | Reference to researcher’s beliefs assumptions |

3.8.1 Credibility.

Credibility addresses the issue of the researcher providing assurance of the fit between participants’ views and the researcher’s re-construction (Patton, 2015). Shenton (2004) outlined criteria used to enhance credibility in qualitative research, namely: the researcher’s background qualifications and experience; triangulation; early familiarity with the culture of participating organisations; member checks; and researcher’s reflective commentary. The credibility of this study was enhanced by the researcher’s background as a Sister of St Joseph with more than thirty years as an educator including seventeen years’ as a Principal in schools in the Josephite tradition. Her qualifications as a teacher and experience as a former Principal of schools in the Josephite tradition enabled her to identify with the exploration of a Josephite approach to education.

The process of triangulation strengthens a study by combining methods of data collection (Patton, 2015). Triangulation was evident in this study whereby the participants were drawn from six schools in varying contexts. Furthermore, the study included three sets of participants, namely the Principals, their respective leadership teams and a Sisters of St Joseph focus group. In this study data
collection included semi-structured one-to-one interviews, focus group interviews, document searches, field notes and a reflective journal. A semi-structured one-to-one interview provides a clear guide for interviewers with topical questions to facilitate the collection of reliable and comparable qualitative data (Cohen et al., 2011). Focus group interviews were utilised as interactions within the group to provide a collective view. A document search enabled early familiarity with the context of each school. The rich source of data provided by the document search has been outlined in section 3.6.2.

The technique of member-checking was utilised as a means of seeking corroboration of the account given by the Principals and the leadership team participants (Bryman, 2012). All Principals, leadership team participants and the Sisters’ focus group were provided with the transcript of the audio-recorded interview to verify the accuracy. Shenton (2004) noted that member checks are most important in bolstering a study’s credibility. All participants reported that no change to the content of the transcriptions was necessary. Finally, a reflective journal assisted the researcher’s reflective commentary. Journal entries reflecting on initial impression and observation of emerging patterns were recorded after each interview. Field notes were recorded during the interviews to note gestures and other non-verbal responses.

3.8.2 Transferability.

Transferability deals with the researcher being responsible for providing sufficient information of the case study for a judgement to be made about the transferability to other cases (Patton, 2015). The issue in this study is the degree to which one can generalise the characteristics of the Josephite tradition identified by Principals and leadership team participants to Josephite and other schools with a religious tradition. Transferability was enhanced in two ways. Firstly, in this study, variation sampling enhanced the transferability of the results as a detailed description of the data collected across six-schools provided both diversity and common patterns. Secondly, the limitations of this study identified in Chapter One informs the reader of the boundaries of this study. While the researcher is responsible for a detailed account of Principals’ and leadership team participants’ intentions, behaviours, strategies and agency, it is the reader who ultimately makes a judgement as to the transferability of results (Patton, 2015).
3.8.3 Dependability.

Dependability in research focuses on the process of inquiry and the inquirer’s responsibility for ensuring that the process was logical, traceable and documented (Patton, 2015). Miles and Huberman (1994) considered dependability as a process for ensuring consistency. Shenton (2004) noted dependability relied on the processes of the research being reported in detail. In this study an auditing approach was undertaken where records of all phases of the research processes were kept, thus ensuring procedural dependability. In this research inquiry, records included the collection and recording of raw data; reduction of raw data, and the synthesis of summaries, field notes and journal records. Moreover, to ensure dependability, this research used a case study design. Specifically, the instrumental case study utilised for this research enabled each step in the data collection to be replicated for each Principal and his or her respective leadership team. A detailed discussion of the research design and its implementation along with the operational detail of data gathering has been provided in this chapter.

3.8.4 Confirmability.

Confirmability in qualitative research is the adherence to objectivity by the researcher (Lincoln & Guba, 1985 cited in Patton, 2015). In qualitative research, confirmability establishes that the data and interpretation of an inquiry were not the figment of the researcher’s imagination. Bryman (2012) and Shenton (2004) suggested that while complete objectivity might not be practical in social research, the researcher must act in good faith and be mindful of any bias, personal value or theoretical inclinations that may sway the conduct of the research and its findings. Qualitative research assumes the researcher is part of the research process and thereby brings a unique perspective to the study (Denzin & Lincoln, 2011). In this study, strategies used to ensure confirmability included documentation of procedures undertaken and consistency in the analysis process. As previously stated, audit trails and the process of a pilot of questions were implemented to ensure conformability in the collection of data across the six schools. The reflective journal provided insights to enhance the researcher’s self-awareness of bias in responding to the data. In addition, the position of the researcher was clearly addressed in Chapter One highlighting her beliefs and assumptions about the study.
3.9 Methodological rigour

Within this research, methodological rigour refers to the planned research design and the precision of data collection. Methodological rigour is assisted by a systematic and conscious approach to research design, data collection, interpretation and communication (Mays & Pope, 1995). Methodological rigour relates to the research design and choice of participants to reflect a representative sample of those working in the phenomenon being researched. In this case, the Principals and their respective leadership teams were selected as a source of knowledge about a Josephite approach to education.

Methodological rigour is evident in this study in the collection of data from Principals, leadership teams and the Sisters’ focus group using an interview guide. To ensure consistency, the Researcher piloted the interview guide as indicated in Section 3.6.1.3. Specifically, the interview guide questions for the one-to-one interviews were piloted with Principals, representative leadership team members and a Sister of St Joseph, none of whom participated in the research. Piloting the one-to-one interview focus group and Sisters’ focus group interview guides enabled the researcher to make any necessary modification, thus aiding the consistency and appropriateness of questions to ensure methodological rigour.

3.10 Data analysis

An interpretive analysis of the data sought to discern, examine, compare and contrast emerging themes (Yeh & Inman, 2007). An interactive cyclical process was used to analyse the data collected from semi-structured one-to-one and focus group interviews. The interactive process focused on three concurrent flows of activity: data reduction; data display; and verification and conclusion drawing (Miles & Huberman, 1994). The interactive and iterative processes occur before data collection begins, during the research design and planning phase, during data collection and post data collection. Figure 3.2 represents the data analysis strategy used in this inquiry.
3.10.1 Data reduction.

Data reduction is the process whereby the mass of qualitative data is reduced and organised. Miles and Huberman (1994) described data reduction as “the process of selecting, focusing, simplifying, abstracting and transforming the data” (p. 10). These authors also noted that data reduction has begun prior to data collection due to the chosen research methodology. That is, the researcher “decides which conceptual framework, which cases, which research questions and which data collection approaches to choose” (Miles & Huberman, 1994, p. 10). The cyclical process of data reduction is ongoing as the researcher makes analytical choices through the process of examining, comparing, conceptualising and categorising the data. (Cohen et al., 2011). In this study, the researcher reduced data through the identification of key themes emerging from the transcripts data from the semi-structured one-to-one and focus group interviews.

A coding process of significant amounts of text, consisting of words, sentences or paragraphs enabled the construction of emerging themes throughout the process. Miles and Huberman (1994) described codes as “tags or labels for assigning meaning” (p. 56). Furthermore, Miles, Huberman and Saldana (2014) emphasised the iterative nature of coding, suggesting that coding drives ongoing data collection early and continues throughout the analysis. In this research, data analysis started with initial coding and was followed by a refined coding. This coded
information then led to the development of emerging themes. The process of data analysis that was utilised in this study is shown in Figure 3.3.

![Figure 3.3: Process of data analysis](image)

3.10.2 Data display.

Data display provides “an organised, compressed assembly of information that permits conclusion drawing and action” (Miles & Huberman, 1994, p. 11). Data display is a helpful strategy to assist the researcher in ‘playing with data’ in searching for patterns, insights, or concepts that seem promising (Yin, 2014). Miles and Huberman (1994) suggested that “displays are designed to assemble organised information into an immediately accessible compact form so that the analyst can see what is happening and either draw justified conclusion or move on to the next step analysis “(p. 11). In this study, displays were organised under the three specific research questions assisting the researcher to draw major themes. Some examples of data display that were in used in the study to derive emerging themes are shown in Tables 3.6-3.8.

Table 3.6

<table>
<thead>
<tr>
<th>Features</th>
<th>Initial Coding</th>
<th>Refined Coding</th>
<th>Emerging Themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Symbols</td>
<td></td>
<td>Behaviours</td>
<td>Storytelling to convey tradition using symbols.</td>
</tr>
<tr>
<td>Story</td>
<td></td>
<td>Philopsophy</td>
<td></td>
</tr>
<tr>
<td>Tradition</td>
<td></td>
<td>Inclusive</td>
<td></td>
</tr>
<tr>
<td>Myths</td>
<td></td>
<td>Language</td>
<td></td>
</tr>
<tr>
<td>History</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Characteristics</td>
<td>Inclusion</td>
<td>Serving community</td>
<td></td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------</td>
<td>-------------------</td>
<td></td>
</tr>
<tr>
<td>Family orientated</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student orientated</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Behaviours</td>
<td>Community</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily examples</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 3.7

*Examples of Coding to Identify Emergent Themes for Specific Research Question Two: What do Principals and their leadership team in schools conducted in the Josephite tradition, identify as the characteristics underlying a Josephite approach to leadership in the context of the school community in which they serve?*

<table>
<thead>
<tr>
<th>Initial Coding</th>
<th>Refined Coding</th>
<th>Emerging Themes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beliefs:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>God centred</td>
<td>Prayer</td>
<td>Faith inspired leadership</td>
</tr>
<tr>
<td>Humility</td>
<td>Faith</td>
<td></td>
</tr>
<tr>
<td>Compassion</td>
<td>Spirituality</td>
<td></td>
</tr>
<tr>
<td>Integrity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inspiration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faith</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Characteristics:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formation</td>
<td>Student Focused</td>
<td>Formation for Mission</td>
</tr>
<tr>
<td>Leadership</td>
<td>Shared leadership</td>
<td>Leadership for Mission</td>
</tr>
<tr>
<td>Responsibility- decision</td>
<td></td>
<td>Metaphors for leadership</td>
</tr>
<tr>
<td>Serving</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Practical action-risk</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mission focused</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Table 3.8
Examples of Coding to Identify Emergent Themes for Specific Research Question
Three: In what ways are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their leadership teams?

<table>
<thead>
<tr>
<th>Initial Coding</th>
<th>Refined Coding</th>
<th>Emerging Themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission</td>
<td>Alignment of mission, practice, tradition and story</td>
<td>Coherency between mission, tradition and practice</td>
</tr>
<tr>
<td>Vision</td>
<td>Policy and procedures</td>
<td></td>
</tr>
<tr>
<td>Policies</td>
<td>Serving families</td>
<td></td>
</tr>
<tr>
<td>Procedures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relational behaviours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Serving students/ families</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shared leadership</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership formation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rigorous practices</td>
<td>Administrative practices</td>
<td>Application of characteristics in practice</td>
</tr>
<tr>
<td>Academic excellence</td>
<td>Educational practice</td>
<td></td>
</tr>
<tr>
<td>Holistic learning</td>
<td>Relevance of tradition</td>
<td></td>
</tr>
<tr>
<td>Administrative practices</td>
<td>Tangible evidence in policies and procedures</td>
<td></td>
</tr>
<tr>
<td>Wellbeing programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>External pressures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agents of change</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Procedures</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3.10.3 Drawing verifications and conclusions.

Drawing verifications and conclusions is the final section of the three-step data analysis process outlined by Miles and Huberman (1994). This third stream of the process enables the researcher to derive meaning from the data, noting any regularities, patterns and possible explanations. To this end, Miles and Huberman (1994) suggested that “the meanings emerging from the data must be tested for their plausibility their sturdiness, their confirmability, that is, their validity” (p.11). The researcher compared the key features, beliefs and characteristics identified in the data collected from the Principals, their leadership teams and the Sisters of Saint Joseph. Specifically, the researcher compared similarities and differences between:

a) Each Principal and the Principals as a group
b) Each leadership team and the leadership team as a group
c) Principals as a group and leadership teams as a group
d) Each Principal and their respective leadership team
e) The Sisters of Saint Joseph
Furthermore, the themes identified in the document search assisted in verifying the evidence found in the comparative data as a means of corroborating and augmenting the evidence. Verifications and conclusions were examined considering the review of literature. As indicated in Figure 3.2, the process of qualitative analysis is an iterative process, thus, the researcher “steadily moves along the three processes “interacting with each in a continuous manner” (Miles & Huberman, 1994, p. 12). Throughout the process of data display and data reduction, the researcher attempted to establish “patterns of variables involving similarities and differences among themes” (Miles & Huberman, 1994, p. 278).

3.11 Ethical considerations

Researchers have an ethical obligation to the participants to preserve their rights and privacy while developing rapport with them. There are concerns in any research regarding the extent to which the researcher’s biases or preconceptions influence data gathering, analysis and reporting (Creswell, 2009). Complying with the Australian Code of Conduct for the Responsible conduct of Research and the University of Notre Dame Australia (UNDA) Policy for Research was critical in upholding all ethical considerations in this study. Approval was sought from all relevant governing bodies of the schools participating in this research. Additionally, consent was given by all participants prior to their involvement in the research process. Table 3.9 outlines the process for this inquiry to ensure the research complied with all ethical considerations.

Table 3.9

<table>
<thead>
<tr>
<th>A Summary of the Ethical Obligations for the Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Approval from University of Notre Dame Human Research Ethics Committee (HREC) (Appendix H).</td>
</tr>
<tr>
<td>2. Approval gained from Catholic Education South Australia and (Appendix I &amp; J).</td>
</tr>
<tr>
<td>3. Approval gained from Trustees of Sisters of St Joseph of the Sacred Heart (Appendix K).</td>
</tr>
<tr>
<td>4. Participants completed consent forms prior to their involvement.</td>
</tr>
<tr>
<td>5. Participants and their individual schools are not identified.</td>
</tr>
<tr>
<td>6. All records of interviews are stored electronically on the password secured computer of the researcher.</td>
</tr>
<tr>
<td>7. All recorded data will be destroyed after a five-year period following the final submission of the research.</td>
</tr>
</tbody>
</table>
3.12 Design Summary

The design summary for the research is outlined in Table 3.12. A chronological summary of the research schedule presents the timing of the activity. The source and / or person(s) involved in the activity undertaken are provided to illustrate the method.

Table 3.10
A Chronological Summary of the Research Design

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Source</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2016</td>
<td>UNDA</td>
<td>Presentation of research proposal</td>
</tr>
<tr>
<td>September 2016</td>
<td>UNDA</td>
<td>UNDA HREC Approval (Appendix H)</td>
</tr>
<tr>
<td>September 2016</td>
<td>CESA (Appendix, I, J) Trustees Sisters of St Joseph (Appendix, K)</td>
<td>Pilot interviewees Pilot of interview guide</td>
</tr>
<tr>
<td>September 2016</td>
<td>Pilot interviewees</td>
<td>Pilot of interview guide</td>
</tr>
<tr>
<td>March 2017</td>
<td>Catholic Schools in the Josephite tradition</td>
<td>Letters of invitation to schools to participate in the study</td>
</tr>
<tr>
<td>March-May 2017</td>
<td>Sisters of St Joseph focus group participants</td>
<td>One-to-one interviews focus group interviews of those wishing to participate</td>
</tr>
<tr>
<td>June-December 2017</td>
<td>CESA Sisters of St Joseph</td>
<td>Document search Transcription / analysis data</td>
</tr>
<tr>
<td>March 2018-February 2019</td>
<td>UNDA</td>
<td>Draft report</td>
</tr>
<tr>
<td>April 2019</td>
<td>UNDA</td>
<td>Submit thesis</td>
</tr>
</tbody>
</table>

3.13 Conclusion

The purpose of this chapter was to outline the research plan for the study which focused on exploring the characteristics of a Josephite approach to education that are identified and implemented by Principals and their leadership team in schools conducted in the Josephite tradition. The research plan explained the justification behind the choice of an interpretivist perspective within constructivist
qualitative research, and it delineated the reason for selecting an instrumental case study design. The methods of data collection were explained along with details of data analysis. Further, the chapter considered elements of trustworthiness, methodological rigour and ethical considerations. The chapter concluded with a design summary. The following chapter will present data under the three specific research questions derived from the two-fold research question of the study.
Chapter Four
Presentation of Research Results

4.1 Introduction

The purpose of this chapter is to present the results from the collective case study examining what Principals and their leadership teams understand by the concept of a Josephite approach to education and in what ways Principals and their leadership teams implement a Josephite approach to education in the context of the school community in which they serve. The data underpinning the results were collected through semi-structured interviews of six Principals (henceforth referred to as Principal/s) and focus group interviews of leadership teams (henceforth referred to as Leadership team participants) in five rural and metropolitan South Australian schools and one school in metropolitan Victoria. The results are organised into three sections based on the three research questions. For the convenience of the readers the three research questions are reiterated in this chapter. In each case, the Principals’ responses are presented first followed by those of the Leadership team participants. By way of comparison, a fourth section entails data collected from a focus group interview with four Sisters of St Joseph who were former principals in Josephite schools in South Australia. The results from the focus group interview with the Sisters of St Joseph provides a particular perspective in the unfolding story of the Josephite tradition and approach to education.

Specific Research Question 1

What do Principals and their Leadership teams in schools conducted in the Josephite tradition identify as the characteristics of the Josephite tradition in their respective school communities?

4.2 Principals’ Responses and Characteristics of Josephite Tradition

Data from the Principals highlighted four characteristics of the Josephite tradition in their respective school communities. These characteristics are: the founding story; service to the community; symbols and language, and a core set of values.
4.2.1 The Josephite tradition and the founding story.

All six Principal identified the founding story of Mary Mackillop as a key characteristic of the Josephite tradition. One Principal stated: “There’s a great story and a great pattern of behaviours and values that we draw on, inspired by Mary MacKillop, and it’s bringing that into a lived expression that fits a context and that is lived contemporarily in the here and now.” According to another Principal the Josephite tradition: “is a deeply held philosophy and approach to education, probably not just education, to all the other ministries, based on principles and practices that were established 150 years ago.”

Two Principals drew on their own experience of the founding story as a student, a teacher and a leader in Josephite schools. As one Principal noted: “My highest commendation for a notion of Josephite tradition comes from that thing that it’s ever changing and it’s dynamic.” She continued to describe how the tradition is expressed in new contexts. Another Principal reiterated the inspiration drawn from the founding story when she stated: “I think the Josephite tradition is practical, hands on, down to earth; it is neither complicated nor esoteric. It is about hospitality, about welcome, it’s about reaching out, and it is about being touched by the spirit of Mary MacKillop.”

Three Principals with 18 months experience in a Josephite school identified the importance of understanding the founding story and experiencing the tradition. One Principal observed: “I could talk about it and I learnt all about it but until it’s sort of here (heart) you feel a bit false.” She emphasised, moreover understanding the tradition needed time to grow. All Principals identified the Josephite philosophy of education based on the founding story of accessibility, inclusiveness and opportunity through education. One Principal summarised this philosophy as follows:

I think for me it is a philosophy about seeing opportunity, seeing need and giving everyone the opportunity to lift themselves up from a particular situation through education, seeing everyone’s potential to succeed and recognising the kind of infinite worth of each individual.

The three leaders valued the founding story in providing a strong basis upon which to develop a Josephite approach to leadership.
4.2.2  The Josephite tradition as service to the community.

All six Principals identified the importance of service to the community as a key characteristic in the Josephite tradition and founding story. One Principal described this service as evolving from the motivating force of the tradition and featuring strong partnerships with families. She stated: “It is a tradition that has God at the centre of everything we do, it is how we do things it is why we do things, it is a tradition of service towards and for other people, it is not just about a service for yourself, it is seeing Jesus in every person we meet.”

Several Principals recognised the characteristic of belonging as integral in serving the community. For example, one Principal remarked: “The Josephite tradition uses that sense of belonging, that encourages and draws out people so that we can all use our gifts and strengths, be proud of what we can achieve, to be able to name what we can do well, and to use these gifts for the love and service of other people.” One Principal acknowledged the challenges in forming community. She stated: “Those who feel on the outer or on the fringe, who have moved here recently, maybe they are not Catholic, and they are a bit different in some way, we try to help them to belong.” Principals described the opportunities to “meet people where they are at” and to “hear stories” of families as a means of serving families.

4.2.3  The Josephite tradition – symbols and language.

A majority of Principals identified the use of language and symbols as key characteristics in conveying the Josephite tradition. As one Principal noted: “I hope it comes through in our words and actions, the way that we operate with a Josephite heart, with a Josephite mind and it becomes part of ‘this is who we are, this is how we work’.” Another Principal remarked: “It’s in using inclusive respectful language and picking up on just the smallest things and the way you do that, and high expectations of language, conduct, effort and the standard of work, all within a sensitive and caring way as well.”

All Principals referred to the symbols within their school community providing a means through which Catholic identity was conveyed with a Josephite flavour. One Principal noted: “Symbols and signs are very important, so it’s all those visuals, from the way, the how, the why prayer-focuses are created in classrooms.” A number of Principals spoke of the use of symbolic artwork reflecting the context in which Josephite education takes place.
4.2.4 The Josephite Tradition as a core set of values.

All six Principals identified the integration of love (charity) and dignity as core values characterising the Josephite tradition. All Principals referred to the school motto where variations on the core values of love, charity, dignity, compassion and kindness were expressed. As one Principal remarked: “Through all those lenses obviously love is the pivotal number one value.” Several Principals described the expression of love (charity) and dignity as the compassionate practical response to situations where the dignity of a person or family was concerned. One Principal emphasised the challenge of extending this compassion daily. She remarked: “Keeping the dignity around each child, on a daily basis, teachers are tested. They’re really tested!” She recalled the common question that arose on a daily basis when meeting difficult situations: “How to keep that child’s dignity in these situations?” Another Principal emphasised the value of compassion by stating: “We work with the marginalised, we ensure there’s opportunity for all, and we work with compassion but in a challenging way.”

All Principals identified the concept of justice as a core value within the Josephite tradition. Several Principals described the prevailing sense of justice as all having ‘a fair go’. As one Principal noted: “I’ve thought a lot about fairness; it says a lot, it is a simple word, just being fair! And that is everyone; staff, students and families, so that it is fair for everyone.” Another Principal observed the holistic way in which justice is experienced in the school community. She noted:

What keeps steady and strong for people is that sense that we walk in the school gates here and there’s an experience for students and for their families and for staff, of consistency, fairness, of everybody getting a go, a fair go! I think people appreciate our honesty, our genuine commitment to working WITH people, our welcome to people and inclusion of all.

Several Principals observed justice as integral in the school rather than defining justice as outreach to someone somewhere beyond the school community. As one Principal noted: “It is education that is equitable, for the poor, marginalised and for bringing people in from the fringes and giving them every opportunity in society; boys and girls, irrespective of status and wealth.”
4.3 Leadership Team Participants’ Responses and Josephite Characteristics

Data from the Leadership team participants highlighted three characteristics of the Josephite tradition in their respective school communities. These themes are: the founding story; serving the community; and a core set of values.

4.3.1 The Josephite tradition and the founding story.

Leadership team participants across the six schools perceived the founding story, in particular, bringing the message of human dignity and Christ’s love to those marginalised, as a key characteristic of the Josephite tradition that inspired, guided and directed their work. As one participant noted: “We are following in the mission of Saint Mary of the Cross MacKillop and the Sisters of St Joseph. So their mission was to educate all people, all children, with a Catholic education and get them to know about God, to learn of God, and just give them that opportunity.” Several participants spoke of the founding Josephite story as a source of “timeless inspiration”. Moreover, these participants noted the need to continually refer to this philosophy. The majority of participants stated the school motto was an important link with the founding story and its spiritual basis. One participant shared the way in which the motto was used: “We’re having a strong focus as a staff on our school motto, ‘love in all things’ and that’s opening throughout the year in varying sorts of ways. So, we keep going back to that and deepening our own spirituality.” A comment from a participant reiterated the importance of the motto as a source of inspiration. She noted: “I think always of the school motto, ‘In all things love’, so I think that relates very much to everything we do. If we just have that as our basis as much as we can.”

Leadership team participants identified the importance of symbols in understanding and communicating the founding story. Several participants referred to the physical symbols such as the names of buildings and the school motto ‘In Omnibus Caritas’ (In All Things Love). Participants recalled introducing symbols to families through storytelling, prayer and ritual during planned faith formation evenings for parents. Moreover, one participant observed that explicit introduction to these symbols and their interpretation in the current context was required so that their meaning was not lost nor taken for granted. This participant noted: “From time to time we remember to explain to new people and to go through the story.”
4.3.2 The Josephite tradition –serving community.

Leadership team participants identified serving the community as a key characteristic of the Josephite tradition in their work with families. One participant noted: “It’s about having that three-way partnership between students, parents and teacher. I would say that connecting with families is a part of our Josephite charism, it is how we live it out.” Several Leadership team participants observed the challenge of developing inclusive partnerships with families in multi-cultural and multi-faith contexts. As a participant remarked: “We need to work always with families because kids come like an iceberg to the school. We only see the top we don’t know what’s happening underneath the ice.” An understanding of family circumstances was seen as critical in enabling the school to be supportive of families in difficult or stressful times. On this point one participant stated: “Sometimes, when there are some tough issues it’s also about being open and honest in that communication and working with the parents, with the staff, with the children, and that can be difficult at times. But it’s important.” The majority of participants observed strong partnerships “being with and for families” as “shaping and sustaining the Josephite tradition” in their school communities.

Leadership team participants recognised the relational characteristic of the Josephite tradition. One leadership team member summarised the impact of integrating relationships throughout the community: “It is not just in understanding how we practice our faith, it is through absolutely everything we do, through our relationships at the canteen, with the Business Manager and so having it as a part of everything we do.” Another participant observed that the expectations of student behaviour are based on relationships. He noted: “Just our rules, the respect for self, others, property and the environment cover everything, the everyday things.”

4.3.3 Tradition as a core set of values.

The majority of Leadership team participants referred to the core values of love (charity) and dignity as central characteristics of the Josephite tradition. Participants observed these core values as being always present in the best and more difficult of circumstances. A number of participants reflected on the ‘compass’ the tradition provided in sustaining the community in difficult times:

We keep going back to the core, to love in all things, and there’s always hope. It mightn’t present itself straightaway and it might be painful. We experience that together sitting with it, but light does break through, life does
break through and sometimes in the simplest ways, and often the most unexpected.

Another participant summarised this characteristic by stating: “It is all about people being worthwhile and making sure that we do everything we can to keep their dignity intact in all our interactions at whatever level.” Participants spoke of the holistic manner in which the values of love and dignity were incorporated into the life of the school. On this point, one participant noted that these values occur; “most particularly in learning situations.” A majority of participants referred to the school motto as the exemplar for integrating Love (charity) and dignity. Finally, one participant remarked: “I’m thinking it’s those living things that we are doing all the time, I think there are very strong symbols of what we think of human dignity.”

Leadership team participants emphasised the place of justice as a core value characterising the Josephite tradition. Participants noted justice was not simply something imparted to others. Rather it was an inherent characteristic of the tradition visible in the way people were encouraged to relate to each other. Participants described the ways in which justice was “seen to be done” in the way school structures were created and in policies and procedures adopted by the school. As one leadership team participant noted about the centrality of justice in the Josephite tradition:

It’s a tradition that is about supporting the marginalised, ensuring there is an opportunity for all, ensuring we’re all called to justice, to be part of that. Everything that we do here at the school needs to come back to justice and making sure that we are honouring justice. We have to make sure we understand that there are students, staff and parents that need that support from us.

Several participants referred to the characteristics of justice underpinning the provision of inclusive and diverse learning experiences. As one participant noted: “We encourage students to be sailors or singers; it’s about encouraging students to have a go.” Three participants identified hospitality as an extension of justice. For example, one of these participants remarked:

This Josephite tradition does it with a real earthiness and its more than just scones and cream. You always get a sausage in bread; it’s almost Australian larrikinism. It’s not high tea hospitality and that is what makes it really nice.”
4.4 Summary

Table 4.1 provides a summary of key characteristics of the Josephite tradition identified by Principals and Leadership team members.

Table 4.1

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Principals</th>
<th>Leadership team participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Founding Story</td>
<td>A philosophy and a set of behaviours</td>
<td>Inspires, guides and provides direction to work</td>
</tr>
<tr>
<td>A Core Set of Values</td>
<td>Charity and dignity, Compassion, The place of justice in the community</td>
<td>Charity and dignity, sustain the community, Justice in school structures &amp; processes, Relationships and diversity.</td>
</tr>
<tr>
<td>Symbols and Language</td>
<td>Physical symbols, rituals, Inclusive language, conveying Catholic and Josephite identity</td>
<td>Physical symbols, storytelling and rituals</td>
</tr>
<tr>
<td>Service to the Community</td>
<td>Belonging reduces the impact of marginalisation</td>
<td>Partnerships and the integration of relationships.</td>
</tr>
</tbody>
</table>

Specific Research Question 2

*What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics underlying a Josephite approach to leadership in the context of the school community in which they serve?*

4.5 Principals’ Responses to a Josephite Approach to Leadership

Data from the Principals highlighted five key characteristics with respect to what they saw as underlying a Josephite approach to leadership in their respective communities. These characteristics are: faith inspired leadership; integrity in leadership for mission; leadership as service and vocation; leadership formation; and metaphors for leadership.
4.5.1 Faith inspired leadership.

All six Principals identified the key characteristics of faith and prayer underlying a Josephite approach to leadership. One Principal commented on “the strength that prayer gave to Mary MacKillop in everything that she did.” She continued describing how “we model prayerfulness, it is a reality in the care that is shown for students, staff and families, at all times and particularly in times of need and that care is sensitive and it is respectful.” Three Principals identified the integration of faith in their leadership. As one Principal noted: “Faith underpins everything we do in the school, it is very visible and links to the tradition and origins of the school. It is very important to leadership.” Another Principal described her faith-filled leadership by stating: “It means being a real beacon of peace, hope, and love for others.” Several Principals referred to the notion of joy as a fruit of God’s spirit in their leadership. As one Principal stated: “Children would know from me that we all have a responsibility to make this a place of Joy.”

4.5.2 Integrity in leadership for mission.

Three Principals identified integrity as characterising a Josephite approach to leadership to enable coherency between tradition and mission. For example, one Principal noted: “Our mission is about faith and believing in the existence and importance of God. It underpins and determines what we do, and it should shape our thoughts and actions and what we say and do on a daily basis and the decisions we make.” Ensuring congruency between what is said and done was important for one Principal, who stated:

It’s that constant crosschecking that what we say we do is experienced by families. In everything we do, from the first moment of encounter with the school community and in an ongoing way, we endeavour to explicitly express the Josephite tradition.”

Another Principal serving in a school in a low socio-economic area remarked: “In my role as Principal here, I continually ask how I can facilitate, enable and empower everyone to do their best to fulfil the mission.”

4.5.3 Leadership: service and vocation.

Several Principals emphasised service and vocation as key characteristics of a Josephite approach to leadership. As one Principal noted: “It seems quite natural to
me. I’ve been placed here to serve this community.” Another Principal with 18 months experience as a Principal reflected on her understanding of servant leadership:

I know there is a hierarchy. You might see a triangle with the leader at the top disseminating various instructions and delegations, and that is not how I believe leadership should be. So, you can invert that and really, I am at the bottom because it is about being there to support and bring out the best in people.

Two Principals referred to a Josephite approach to leadership as cognisant with vocation. As one Principal remarked: “It’s a commitment, it’s more than a commitment, it’s more than work, and it’s a vocation.”

Principals identified the characteristic of humble service as essential in a Josephite approach to leadership. For example, one Principal described the example of Mary MacKillop’s humble practical service. She stated: “She was such a ‘get your hands dirty, just get in and do it’ person”. Another Principal observed the confusion for some people in understanding humility. She remarked: “I have been told in leadership reviews about not being so humble about things.” Continuing to explain her understanding of humility she said: “I think you still have to be yourself.”

4.5.4 Leadership formation in the Josephite tradition.

Several Principals identified a commitment to formation as characteristic of an approach to leadership in the Josephite tradition. One Principal, who is in the first 18 months of her appointment as Principal in a Josephite school, reflected on the initial days of her appointment. She stated:

I could say the words, but it didn’t feel true to me, until I had a chance to be part of that formation. I certainly experienced the words, the sense of history and understanding of the Josephites and Mary MacKillop, and all those sorts of things. But it’s moving it from the head to the heart”

Several Principals referred to the formation received in working alongside Josephite sisters. As one Principal stated: “I have been blessed with extraordinary formation as a leader in this Josephite school. I have a strong appreciation and commitment to the values that underpin that style of leadership and education.”

Principals identified the importance of ongoing formation in exercising a Josephite
approach to leadership in challenging contexts. As one Principal remarked: “we can gain strength from sharing in the tradition despite all the challenges of accountability, the difficulties in wider Church, systems expectations and complex family situations for ourselves and for those with whom we work.”

4.5.5 Metaphors for leadership.

All six Principals reflected on an image, symbol or metaphor to describe the characteristics underlying the Josephite approach to leadership in their respective school community. One Principal remarked: “I think of the statue of Mary MacKillop walking with children and all that it encompasses. You cannot walk with children if you do not walk with their parents and staff, it is simple, it is joy.” Another Principal referred to the document ‘Children: Close to the Mystery of God’ (CESA, 2015) to draw on the image: “Each child is an icon” to illustrate her understanding of the sacredness of the child as central in a Josephite approach to leadership. A Principal serving in a rural area referred to a farming analogy when considering her leadership: “It is about sowing the seeds, being hopeful and providing all the nourishment that you can to enable that to take root and to grow.” She described servant leadership as “I might just be tilling the soil.” Two Principals referred to Scripture texts as the metaphor for their approach to leadership. One stated: “There is an element of ‘love one another as I’ve loved you’ and it is very much about always reflecting on this is who I am.” Another Principal highlighted a similar text; she remarked: “It’s about treating other people how you want to be treated yourself; the metaphor would be human-ness.” The images, symbol and metaphors used by Principals highlighted key characteristics of a Josephite approach to leadership.

4.6 Leadership Team Participants’ Responses to a Josephite Approach to Education

Data from the leadership team participants highlighted six main characteristics underlying a Josephite approach to leadership in their respective communities. These characteristics are: servant leadership; humility and compassion; care for individuals; responding to needs; shared leadership; decision making and risk taking.
4.6.1 Servant leadership.

All Leadership team participants referred to the characteristic of service as underlying a Josephite approach to leadership in their respective school communities. One participant summarised this understanding by saying: “I see it as a servant leadership tradition built on relationships, and with that comes trust and giving people opportunities to develop their ability.” Another participant stated: “So it’s not about, ‘we’re measured by what we do’; our identity should come from who we are as a community.” Several participants referred to their sense of mission and the integration of gospel values to describe their leadership as service. As one participant remarked: “So we are delivering a Catholic education through the lens of a Josephite charism. We have to come back to Christ in everything that we do, it’s how the gospels are lived out through the Josephite charism.” Another participant described servant leadership as a living example of the God’s mission in the world and the opportunity to give witness to Jesus in what is said and done.

4.6.2 Humility and compassion.

Several Leadership team participants identified humility and compassion as underlying characteristics in their approach to Josephite leadership. One participant referred to compassionate leadership as particularly evident when students were most marginalised. He stated: “There is that sense of forgiveness and that sense of we start again and each day is a new day.” Another participant described the challenges posed when leading in a compassionate manner to address the status quo. She queried: “So how do you challenge and be compassionate and challenge minds to higher order thinking?” Three participants identified humility as underlying the approach to leadership in the school community. One participant described her observations of this humility in the lives of the Sisters of St Joseph and its inspiration for the ongoing work of leaders. She remarked: “The Sisters are just so humble, and they just go about their business, and that’s kind of what we have to do as well.” One participant summarised the incorporation of these values in the approach to leadership in the school over many decades. She noted: “it’s just ingrained in us (the core values of compassion and humility), it is just something we do. They are present and get passed on!” The values of humility and compassion were seen to characterise leadership in the Josephite tradition.
4.6.3 Care for individuals.

All Leadership team participants identified the centrality of student learning and care for wellbeing as characteristic of a Josephite approach to leadership. One participant commented: “I think every student would know there is someone on staff that keeps an eye on them and checks in with them regularly and ensures that they’re looked after.” Several participants referred to the care of the individual in both learning and wellbeing. As one participant remarked: “We believe we need to attend to the children’s wellbeing first of all; they can’t learn unless they’re safe and happy, and we are here for the whole child.” Participants emphasised the challenges in extending particular care to those students who are marginalised. One participant stated: “Kids are marginalised in a whole, variety of ways; they are marginalised via technology and in relationships.” Several participants stressed the significance of understanding individual stories when responding to situations where students are marginalised. One participant remarked: “being open to their stories and accepting that their story is really important”. Another participant described the impact of caring for individuals who are isolated or traumatised and the need to be creative in responding to individuals. She noted: “sometimes, you don’t always get it right, so it draws out the best in you, but it also really stretches you”.

Most participants referred to the important partnership with children and their families, particularly when student behaviour was the symptom of their marginalisation. As one participant stated: when working with a student, seven or eight times, when you actually look deeper into that child, you learn about their family and what’s going on their home life, you can understand why the child is behaving in a certain way at school”. The care for students’ learning and wellbeing were strongly affirmed as characteristics of a Josephite approach to leadership.

4.6.4 Responding to needs.

Leadership team participants identified the characteristic of responding to the needs of students and their families as central in their approach to leadership. One participant observed the necessity of reading the signs of the times as she remarked: “A need today is different to a need in Mary’s time and day, so we’re just interpreting Mary’s legacy in our context.” A participant recalled responding to the need of a child under the guardianship of the Minister. He stated: “Access for some children to education is tricky and how to help that child to access education in a
way where they feel loved, they belong and know we are interested in them.”

Another participant observed the need for children and their families to have a sense of belonging. He noted:

There is a real need today; you’ve got migrants and refugees coming with limited English, so helping them to access education. It is also helping their parents too with all the forms and things like that. We are always looking for ways of being able to help them to feel they belong such as in discussions and dialogue, so they feel they belong in that sense too.

Another participant described the challenge in assisting families who are on the margins of society. He asked: “What does it mean to be part of this community and what are we doing for our marginalised families to engage them in society?” The leader’s mediation skills were considered as crucial in responding to the needs of parents, students and teachers. As one participant stated: “Often there is a disconnect between what parents expect from their children and their actual capacity and then there are the expectations of teachers in working with those students.” This participant explained the importance of building trusting relationships with staff and parents to enable honest conversations about capabilities and aspirations when responding to the learning needs of students and their families.

4.6.5 Shared leadership.

Several leadership team participants identified the characteristic of shared leadership as integral to a Josephite approach to leadership. As one participant observed:

It’s keeping that collaboration alive; it was Mary and Julian in partnership that began this, and we continue to work in partnership with our parish in lots of different ways and we have had a wonderful relationship with the Sisters, everyone on staff personally takes on that to keep it alive.

Participants in one school described their school approach to shared leadership as stewardship, with one participant noting: “We believe everyone is a leader and that we are stewards as the nominated leaders. Our role is to shepherd and guide and listen to the wisdom of others.” Another participant described leaders as the ‘custodians of the charism’. She commented: “There’s no one on a pedestal, we’re sort of here to do our bit for a short time.”
4.6.6 Decision-making and risk-taking.

Leadership team participants identified the characteristic of decision-making based on the educational needs of students as essential in a Josephite approach to leadership. One participant gave the example: “When we need to make decisions we always go back to ‘how does that affect the students?’ and ‘what is the benefit to the students?’ rather than initially looking at issues of finance.” Several participants stressed the importance of explicitly integrating values for good decision-making. As one participant stated: “When leaders are working hard on values it informs us, motivates and inspires us.” Another participant remarked: “I think we need to be grounded in that Josephite tradition.” As this participant noted, “we need to keep looking at those core values to make sure when we’re making decisions into the future, that we’re still being true to that tradition ... we probably always need to make sure that they’re underpinning the decision.”

Several participants drew on the founding story to emphasise the characteristic of risk-taking in a Josephite approach to leadership. Four participants recalled Mary Mackillop’s example of leadership as a strong independent woman, willing to take risks. One participant remarked: “She was a standout in her time and that’s what we need to be for our kids too; we need to be standouts. We can’t be just following everyone!” Another participant reflected on Mary Mackillop’s practical response to situations. She stated: “Mary MacKillop jumped on a horse and did those things, she helped people, and it was real practicality. We’ve got to do this, let’s just get on with it and there are risks in doing that, but you have to be prepared to take that risk to be really true to the values.” Finally, one participant noted: “I see this (approach to leadership) as a tradition that’s been ground-breaking and risk-taking.”

4.7 Summary

Table 4.2 provides a summary of the characteristics underlying a Josephite approach to leadership identified by Principals and Leadership Teams.
Table 4.2

Characteristics Underlying a Josephite Approach to Leadership Identified by Principals and Leadership Teams

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Principals</th>
<th>Leadership team participants</th>
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</thead>
<tbody>
<tr>
<td>Faith inspired leadership</td>
<td>The integration of prayer, spirituality and faith</td>
<td>Humility and compassion</td>
</tr>
<tr>
<td>Integrity in leadership for mission</td>
<td>Coherency between tradition and mission</td>
<td>Alignment of policies &amp; procedures</td>
</tr>
<tr>
<td>Leadership and service</td>
<td>Servant leadership with an emphasis on humility</td>
<td>Servant leadership, care for the individual and responding to need</td>
</tr>
<tr>
<td>Leadership formation</td>
<td>Formation of leaders</td>
<td>Shared leadership, decision-making and risk-taking</td>
</tr>
<tr>
<td>Metaphor for leadership</td>
<td>Scripture – symbols and images from the founding story</td>
<td></td>
</tr>
</tbody>
</table>

Specific Research Question 3

In what way are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their leadership teams?

4.8 Principal’s Responses and a Josephite Approach to Education

Data from the Principals highlighted how the characteristics about a Josephite approach to education are evident in their leadership practices that emphasise: coherency between mission, tradition and practice; educational excellence and rigour; serving families and forming community; the relevance of Josephite principles.

4.8.1 Coherency between mission, tradition and practice.

All six Principals outlined the importance of coherency between mission, tradition and vision as evidence of leadership practices in a Josephite approach to education. One Principal described the process of strategic planning in light of the school’s vision and mission. He noted: “We went back to our vision and mission
statement; do we need to rework it? Are we still doing this? So, we keep revisiting.”

Another Principal spoke of the formulation of policies reflecting the mission. She stated: “The actual physical documents are prefaced with a belief statement and that is grounded in scripture and tradition.” The challenge in ensuring coherency between mission, tradition and administrative practices was summarised by one Principal. She stated: “I think increasingly there is a sense that schools are businesses and that is one thing that we are consciously resisting here because there are things we want to invest in simply because they maintain traditions that are very important.”

Several Principals referred to the challenges in leading with integrity to ensure policies and procedures were cognisant with mission. The most common example referred to was the Fee Policy. Three Principals emphasised the challenges of ensuring accessibility and affordability in the implementation of the policy. As one Principal observed: “I know you can have a policy but whether people feel they can have a chat when the time comes even though it is certainly written in the policy.” Implementation of fee policies was seen as a sensitive area of work for Principals. One Principal stated: “There is wide discretion for the leader of this Josephite school to humbly, gently, strongly and supportively work with families without them needing to show bits of paper like in some Government department and to divulge all sorts of information.” Another Principal referred to the value of a Fee Assistance Policy. She stated: “I think families certainly see the Fee Assistance Policy as being an administrative practice that supports the school’s philosophy.”

All six Principals referred to the importance of daily administrative practices and procedures reflecting the school’s philosophy of inclusivity and equity. One Principal used the example of the procedure for following up on student absences. She noted: “It is not just about accountability and ticking a box, it is about pastoral care for the student and family.” Another Principal referred to the uniform policy and procedure as a means of ensuring dignity and enabling access to education. He noted: “Those in disadvantaged circumstances should not always be given a second-hand uniform. Our practice is that money raised from second hand uniforms goes towards buying new uniforms for the most disadvantaged.”

4.8.2 Educational rigour and excellence.

Several Principals highlighted the promotion of rigour and excellence evident
in leadership practices in a Josephite approach to education. As one Principal stated: “Academic rigour is something that is Josephite and is part of Josephite education.” Another Principal highlighted the challenge in creating a rigorous learning environment stating: “It is not just about being comfortable, it is not just ‘we are a warm and happy place’.” One Principal described her practice of promoting excellence and rigour as an expression of hospitality. She observed: “It is about academic success and academic challenges as well, and that’s quite legitimate within a Josephite school as that sense of looking after the marginalised and caring, it’s that hospitality aspect.” Another Principal described how she regularly shared her vision for academic rigour with her staff. She stated: “Each student has the opportunity to be who they are and also an opportunity to succeed and to be challenged. It needs people (teachers) to have faith in their abilities and what they can possibly achieve.”

Principals emphasised the design of a holistic curriculum and the skill of teachers as evidence of leadership practices that promoted a rigorous approach to Josephite education. As one Principal remarked: “The teacher in the classroom is concerned about the child; who they are, who has different learning goals, and then develops separate strategies for working with that student.” Another Principal described the Religious Education curriculum as promoting a rigorous learning environment. She noted: “The Religious Education program and curriculum is very obvious; we make no apology for the fact that we are a Catholic school and religious education is very important to us.”

### 4.8.3 Leadership practices that serve families.

All Principals provided examples of leadership practices that enabled them to serve families. In this respect the practices used in the selection and formation of staff was seen as pivotal in ensuring the school was conversant with the needs of families. One Principal described the process of selecting and appointing staff who are compatible with the ethos of the school. He noted: “our parents will not regularly raise issues; they would only feel comfortable if the teacher was approachable.” Another Principal reflected on her practices in working with staff to ensure they were conversant with the needs of families. She observed: “There’s messiness in how we operate at different times with what is going on in our lives, and the same is with our families and our girls as well, and that’s ok.” One Principal described how
she was conscious of the example she set for staff when mediating difficult situations with parents. She remarked: “Even though it is hard, I remain professional. It is more than professional; it is about human dignity, forgiveness and reconciliation.”

Several Principals described the challenges experienced when making decisions with sensitivity to the circumstances of families. One Principal used the case of whether to incorporate a particular type of technology in the curriculum to illustrate this tension. She remarked: “We won’t implement this form of Technology because that relies on every household at home having access and they won’t. We value inclusion and access for all.” Another Principal referred to her leadership practice when mentoring staff in the process of reporting to parents. She stated: “Staff understand what I think is acceptable and not acceptable to write about students. I talk about being in the place of the parent, putting themselves in the other’s shoes.”

4.8.4 Relevance of Josephite principles in leadership practice.

All six Principals identified Josephite principles as relevant in animating their leadership practice. As one Principal stated: “the relevance of the tradition says a lot about the spirit of Mary MacKillop and St Joseph. The very clear principles in the tradition are timeless, I don’t think there is anything that has not stood the weather of time, and they are the real deep-down things”. Another Principal noted: “the principles that underpin the Josephite philosophy of education have not changed; it is just about re-imagining it for the current context”. Several Principals described drawing on the principles as a means of integrating faith and learning in their educational practice. As one Principal remarked: “there is a need for drawing on what is good and sustaining and is very much grounded in our faith tradition and expressed contemporarily”.

One Principal summarised the importance of re-imagining the Josephite tradition when responding as a leader to external challenges where inequity and injustice was prevalent. She noted: “I think the idea of someone being out there like Mary MacKillop to challenge the status quo, to challenge authority to serve marginalised people, will always be necessary. Advocacy for people who do not have a voice is critical.” Several Principals highlighted the ongoing manifestation of need in their respective community. As one Principal
The need is expressed in all kinds of different ways; it might be spiritual poverty, educational poverty or people’s financial circumstances. It is re-stating and re-affirming the philosophy and values that have underpinned everything in the past and translating that into a new context so that the story continues with new characters.

4.9 Leadership Team Participants’ responses to a Josephite Approach to Education

Data from the Leadership team members highlighted four characteristics about a Josephite approach to education are evident in their leadership practices. These characteristics are: coherency of policy and procedures; educational rigour and relational learning; serving families and forming community; relevance of Josephite core values in leadership practices.

4.9.1 Congruency of policy and procedures.

Leadership team participants identified the congruency between mission, vision, policies and procedures as guiding their leadership practices in a Josephite approach to education. One participant stated: “Every time we go over our policies and address them we always have our mission and vision to guide us.” Another participant highlighted the importance of the whole school community being aware of their responsibilities in observing policy statements. This participant described the role articulated for the School Board, Principal, parents, teachers and students in each of the policies. She stated: “Everyone knows what their role is in educating students.”

Several leadership team participants recognised the characteristic of inclusivity, evident in school policies and procedures as supportive of their leadership in a Josephite approach to education. For example, one participant referred to the Fee Policy. She stated: “The purpose of having an inclusive fee policy is to make education accessible; it means that any costs are known up front for the family, so there are no extra costs added for going on an excursion or a camp or anything that, it’s all part and parcel of the fees.” Another participant reflected on the impact leaders made in adapting policies and procedures to support families in marginalised situations. He stated: “Walking with families who are financially marginalised has been really powerful.”
All leadership team participants identified the application of justice, charity and dignity in their leadership practice when mediating and resolving conflict in the school community. As one participant noted: “Restorative practices and personal responsibility are definitely evident in our practices.” Several participants referred to the challenges experienced in educating staff and families in the purpose of restorative practices, particularly when suspension and expulsion were advocated as possible outcomes of undesirable behaviour. Another participant reflected on the alignment of the core values with leadership practice when observing her colleague conducting a re-entry meeting with a student: “He introduced the process very well and talked about the Josephite way of welcoming back people who have made mistakes.” Another participant commented on the core values visible in mediating conflict: “restorative practice fits in well, because it’s about reconciliation and children understand reconciliation. So, we used the words ‘empathetic’ and ‘merciful’; they suit our approach.”

4.9.2 Educational rigour and relational learning.

All leadership team participants acknowledged that educational rigour and excellence underpinned their leadership practices with colleagues, students and families. One participant stated: “I think the Josephite tradition of excellence justifies my approach to education. It justifies the choices that I make in the classroom, in the community. I can use the value for excellence when communicating with families”. The approach to rigorous learning was seen to be borne of the relational quality of teaching. As one participant remarked: “We have a very deliberate focus on learners and learning and it’s really trying to engage students at their level. Teaching is relational; it is very much about relationships.” The relational aspects of teaching and learning were further emphasised by a second participant. He stated: “Our role is to provide for the needs of each student and to be flexible in planning, particularly for individual education plans to ensure each child reaches their best.” Another participant described her curriculum leadership in promoting a rigorous learning environment. She stated: “We provide cutting edge pedagogy because we want the child to be the very best child they can be at that minute. We can’t do that if we are not providing a contemporary innovative curriculum that is hands on.”

Several participants emphasised the significance of their leadership in
developing a holistic curriculum where student wellbeing and relational learning is central in a Josephite approach to education. One participant stated: “It’s about the whole person, its spirituality; it’s in everything that makes the person who they are.” Another participant described the leadership required to create a culture whereby: “We don’t just teach academics, we teach what it means to be human and be part of society and part of the community, so our students understand what it means to be a good person.” Another participant stressed the importance of leadership practices that attended to the wellbeing of the child and the family. She noted: “The whole issue of mental health and wellbeing is important all the time and particularly in our now.” Several participants made reference to their leadership practice of integrating programs such as Positive Education with the values and characteristics of a Josephite approach to education. As one participant noted: “Positive education and the Josephite tradition, it is all the same thing.”

Most participants reflected on their leadership as purposefully developing a relational and rigorous approach to education in their respective schools to mitigate the impact of marginalisation. One participant remarked: “Particularly in this community where there is so much hardship and a lot of tragedy, what we offer, whether students realise it at the time or not, is some sort of faith and hope.” Several participants emphasised their leadership practice in promoting a learning environment where the development of skills, confidence and knowledge enabled all students to be of service to others. As one participant stated: “The emphasis is on a positive contribution to society, and the community, whether students are academically successful, that might not be the main point.”

4.9.3 Serving families and forming community.

All leadership team participants were aware of the Josephite characteristic of serving families and forming community as central to their leadership practices. As one participant explained: “Some students come from situations of trauma or lower socio-economic circumstances. There might be violence at home. The beauty is that as leaders we really want to make a difference and want to teach these children.” Several participants provided examples of adapting practices to suit student needs and varying family circumstances such as engaging interpreters to assist when English was not the first language. One participant noted: “Communication is very strong here with parents, particularly where children have special needs or others
who are finding it difficult to make the right choices at school.” Another participant described the leadership team’s effort to understand the local context in which families lived. He stated; “We visited the two new housing estate areas in the student population catchment area. It was a good thing to do because sometimes you can come to work and everything else around you does not exist.”

Several leadership team participants recognised the need to adjust their leadership practice of communicating with families in light of the benefits and challenges of technology. One participant described the development of an email communication policy to support timely and effective communication between staff members and families. Some participants were sensitive to the impersonal nature of technology in communicating with families and valued personal contact in responding to staff or parent concerns. As one participant noted: “If there are issues with a particular child we ask staff to phone and speak to the parent or ask them to come in so that we can have direct communication with them.”

4.9.4 **Relevance of the Josephite tradition and core values in leadership practice.**

All leadership team participants highlighted the core values within the Josephite tradition as influencing their leadership practices. As one participant remarked: “The Josephite tradition is more relevant than ever, especially that servant leadership aspect. Leading by example, with humility, nurturing leadership and all those relational things are more important than ever.” A participant observed: “If you look at the underlying values and motivation; compassion, respect, dignity, care and meeting students where they are at with their learning and faith, all of that is actually unchanging.”

Several participants identified various external pressures they perceived were impacting on their leadership practices. As one participant noted: “I think simplicity could get lost, that idea of a humble spirit; let’s just cut to the chase and focus on what matters in these days of marketing, publicity and competition.” Another participant observed the impact of the industrial climate on leadership. He stated: “There is a lot of good work that goes on and this industrial model is making it uncomfortable. It is not acknowledging a lot of the good things that are going on.” A further comment reiterated the negative influence of some industrial matters. As one participant noted: “Once you start measuring what everyone is expected to do then
Several participants stressed that Josephite tradition and the core set of values informed their leadership in meeting challenges and acting as agents of change. One participant stated:

I think education has and always will be the only kind of way to transform society. I think sometimes education systems maintain the status quo in a way. We need to go beyond that, as educators at the cutting edge of the work of the Church. It is a privileged position to be in but is a scary position and very challenging. I don’t think it has changed from Mary Mackillop’s time; when you challenge things, you will get criticised.

Two participants drew on the founding story of “education for all” as the inspiration evident in their leadership practice. As one participant remarked: “Mary Mackillop was so progressive, she gave vulnerable people what they did not have (education) to give people a better life and I cannot see how it is not relevant today.” Finally, one participant concluded: “Mary MacKillop was a true woman of vision, to set this up (education for all) so many years ago and it is still relevant today, it is still evident today.”

4.10 Summary

Table 4.3 provides a summary of the key characteristics about a Josephite approach to education evident in leadership practices of Principals and leadership teams.

Table 4.3
Key Characteristics of a Josephite Approach to Education Evident in Leadership Practices of Principals and Leadership Teams.

<table>
<thead>
<tr>
<th>Characteristics evident in leadership practices</th>
<th>Principals</th>
<th>Leadership team participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coherency between mission, tradition &amp; practice</td>
<td>Strategic planning</td>
<td>Policies and procedures, Restorative practices</td>
</tr>
<tr>
<td></td>
<td>Administrative practice</td>
<td></td>
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<tr>
<td>Educational rigour</td>
<td>Academic excellence</td>
<td>Relational learning</td>
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<td></td>
<td>Wholistic curriculum</td>
<td>Wholistic curriculum</td>
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<tr>
<td>Serving and forming community</td>
<td>Staff selection and formation</td>
<td>Serving those in marginalised circumstances</td>
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<tr>
<td>Decision-making for inclusion</td>
<td>Impact of technology on relationships</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Application of the Josephite tradition in practice</th>
<th>Timeless principles</th>
<th>External pressures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Re-interpreting and re-imagining the tradition</td>
<td>Agents for change</td>
<td>Inspiration of the founding story</td>
</tr>
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</table>

### 4.11 Data collected from the Sisters of St Joseph

A focus group interview was conducted with four Sisters of Saint Joseph, all educators and former Principals of Josephite schools in South Australia. The four Sisters by virtue of their former roles and responsibilities and the fact that they are members of the Congregation of the Sisters of Saint Joseph, provide a perspective of the Josephite tradition and approach to education. The Sisters identified four features underpinning a Josephite approach to education and leadership. These features are: formation in the Josephite tradition; characteristics of Josephite leadership and approach to education; perceived challenges Principals and leaders currently face in implementing a Josephite approach to education and envisioning the future of education and leadership in the Josephite tradition.

#### 4.11.1 Formation in the Josephite tradition.

Each Sister recognised her formation as a Josephite educator stemmed from her experiences as a student in Josephite schools, her teacher training and as a teacher alongside Josephite Sisters. This formation in the Josephite tradition enabled the Sisters to value the importance of the relationship between teacher and student; the integration of faith and prayer in all of school life; a commitment to doing all things well, and a creativity and resourcefulness in the face of limited resources. One Sister commented on her early experience as a student: “you were always welcome around the teacher’s desk”. Several Sisters described their early experiences as Josephite educators. One Sister remarked: “you knew there was a frugality in terms of resources yet always a creative response”. The Sisters described how their formation as teacher and leader was grounded in the ordinary ways in which the Sisters of St Joseph cared for people and things while creating and forming a faith community in their approach to education. As one Sister
remarked: “faith and prayer were totally integrated into celebrations, there was a sense of fun amongst the women and a creativity that everything was to be done well”.

4.11.2 Characteristics of the Josephite tradition and approach to Education.

The Sisters identified seven core characteristics of the Josephite tradition underlying a Josephite approach to education. All Sisters were unanimous in naming the unconditional love of God as the motivating force for a compassionate response in the care and wellbeing of students in a Josephite approach to education. Compassion was regarded as core to the Josephite tradition and was particularly evident when ensuring children and families in marginalised circumstances received the best educational opportunities. As one Sister commented: “whoever came to the school was included; the mum who was distressed, the marriage that had just broken up, whoever came to you it was just a creative response to work with the situation”. Another Sister described the way in which compassion was expressed: “the support of families in difficulty was done with dignity and quiet support, be it with fees or books or being with the family or young person who was not managing”.

The Sisters accentuated the integration of faith, life and culture permeating everything in the school as a hallmark of a Josephite approach to education. The capacity to integrate faith, life and culture enabled students to participate, enjoy and have a sense of comfort with the faith dimension of the school community. The Sisters recognised that the tangible nature of a Catholic Josephite identity is experienced through a spirituality and reverence expressed in liturgy, ritual and symbol. Reflecting on a recent visit to a Josephite school one Sister remarked: “You see the integration of faith and culture. I do not just mean diverse cultures, but you see faith permeating this place and you can see that compassionate and unconditional love of God”. The Sisters affirmed the integrated nature of faith, life and culture as influential in providing a positive experience of Church for staff, students and their families.

All the Sisters agreed that kindness, especially for those in underprivileged circumstances, is core to a Josephite approach to education. Kindness was described as the gateway to the heart of the Gospel. One Sister commented: “we must keep that value for kindness embedded in the culture of the school; kindness for those in
underprivileged circumstances; for those who are in stress of any kind. You pick it up when you watch the behaviour between people and the welcome offered when visiting a school”. The Sisters believed acting kindly allows leaders to go beyond what would be a standard response and to infuse a situation with gospel traits. As one Sister remarked: “asking ‘what is the kind thing to do in this situation?’ takes us to the heart of the Gospel”. The practical response of kindness was seen to be an expression of Charity; the compassionate love of God underlying all aspects of leadership. The school motto, “In Omnibus Caritas” (In All Things Love) created and designed for South Australian Josephite schools, was emphasised as grounding and guiding the permeation of charity in Josephite education and leadership.

The Sisters described the importance of creating access to education as an essential characteristic underlying a Josephite approach to education. Practical examples were used to illustrate how access to education was evident within the school community such as; access to curriculum, pedagogy, finance and social participation. One Sister emphasised accessibility in relation to the transmission and integration of faith, life and culture. She stated: “the Christian Catholic meaning has to be accessible in language, word and symbol and relevant in the lives of students, families and the staff community”.

The Sisters emphasised a Josephite approach to education placed the child and young person as the focus of learning. Access to Josephite education was regarded as commensurate with children and young people striving for personal excellence aided by leaders and teachers inspiring a love of learning. The Sisters claimed the hallmark of Josephite education is evident in building on the strengths of the child and young person in order for students to become skilled, confident learners, ready and able to share their gifts in the service of others. As one Sister noted: “there is an expectation for students to be the best they can be and to engage in all the opportunities available such as music and sport and to be involved in the community.”

According to the Sisters, the notion of “walking with” students and their families is it a key element in a Josephite approach to education. The Sisters noted that a sense of solidarity underpinned the actions taken in caring for the wellbeing and learning needs of each student. The Sisters recognised solidarity is grounded in the belief that family is the basis of society and hence no one is to be excluded. By working in a spirit of co-operation all divisions and difficulties can be overcome. As
one Sister commented: “a concern for the individual who might be falling between the cracks leads staff to name and recognise the struggle and to have conversations about how to change the situation rather than rejecting a child or young adult”. The proactive approach of working to find a positive solution for the child, young person or family is indicative of the way leaders and teachers work together, drawing on their different skills to make things better for a child or family. That is, the Sisters believed an integral characteristic of Josephite education entailed school leaders working in solidarity with students, their families and in supporting staff.

The Sisters recognised a commitment to hard work was crucial for education to be accessible and inclusive of all, especially for those in marginalised circumstances. One Sister described the importance of gaining an insight into the struggles experienced by families. She stated: “making a commitment to ‘get it right’ is the hard work in serving families in times of need.” The physical application of skills, knowledge and using resources effectively signified the hard work of the Sisters in serving the community. The Sisters commented that hard work, determination and the capacity for lateral and creative thinking characterised Josephite leadership in creating the best educational experience for students in metropolitan and rural areas.

4.11.3 Challenges in implementing a Josephite approach to education.

The Sisters reflected on the challenges they perceived leaders face in implementing characteristics of a Josephite approach to education. The challenges of accountability due to increases in legislation and bureaucracy in education were considered to have placed additional demands on the daily work of Principals and their leadership teams. The pressures on the Principal’s role were perceived as a threat to the Principal having the time and capacity to know students, families and staff members and possibly impacting on discernment and decision-making processes. One Sister remarked: “the demands can cut leaders off from knowing the community and can lead to uncertainty or making the wrong decision about someone because they have not been able to be amongst the staff and students.” The Sisters commented on the extraordinary commitment required of Principals and leadership team members to lead in ways that create community and to remain in tune with the school community.

The Sisters recognised the challenge for Principals in responding to the needs
of families and ensuring care of those in marginalised situations in the current socio-economic context in which education takes place. One Sister described the influence Principals have when working with School Boards in the formation of policies.

She stated: “Principals have to find their voice on the Board to ensure pathways are created for families experiencing difficulties, be it financial support or in other ways in which access to Josephite education is made possible”. The Sisters noted that the Principal must have an educative mindset at all times. One Sister gave an example of how an educative approach was required by the Principal when implementing a fee policy in a low socio-economic context when working with families in their fourth or fifth generation on unemployment benefits or experiencing underemployment. She stated: “it requires the leader to recognise that the management of finance is a gift. Intergenerational poverty is the one thing we can stop into the next generation if we can keep the children of these families in a good educational setting”. The Sisters emphasised the Principal’s leadership is critical in ensuring policies and processes were accessible and educative in the financial support of families.

The Sisters perceived industrial issues had the potential to place undue strain on the school community and on leadership teams in schools. The issues and pressure around salaries, allocation of time and the different responses from staff members to those matters was seen to create challenges for leaders in maintaining and building community. The leadership required in keeping the balance between respectful and relational dialogue during difficult negotiations was seen as critical in preventing communities from being torn apart.

4.11.4 Envisioning the future of a Josephite approach to education.

The Sisters participating in the focus group interview were asked to highlight the key elements they envisioned necessary for the story of the Josephite tradition and approach to education to continue. The sisters highlighted compassion, a focus on student learning and wellbeing and ecological awareness as essential elements. Their responses included a strong emphasis on the capacity for leaders to know their students and their community and to respond to the needs of families rather than responding from a theoretical understanding of need. As one Sister commented: “being aware of the circumstances of the people being served is key”. The Sisters unanimously claimed that schools conducted in the Josephite tradition must be open
to all. All Sisters agreed that it was essential for relationships to permeate throughout the community and for Principals and leadership team members to attend to the dynamic of relationships at every turn.

The Sisters identified the living expression of a compassionate God and the unconditional love of God as ideally being the motivating force behind all leaders’ actions, decisions and behaviours in a Josephite school. One Sister observed the Josephite tradition provided both the Sisters and school leaders: “with the opportunity to be the very best of the compassionate Church through the ministry of Catholic education”. The daily experiences of education, liturgy, and administration are regarded as powerful vehicles to express the compassionate love of God and to give witness to the faith community.

The Sisters emphasised a compassionate focus on each student’s wellbeing and learning to ensure excellence was critical for the authenticity of Josephite education. In particular, the care of the child or young adult whose behaviour or circumstances put them at risk was highlighted as central. As one Sister remarked: It’s not easy, it is like trying to nurture a porcupine, their prickles are up, they hurt, and they hurt the people who are trying to help them. It is important for our schools to be places of the living expression of a compassionate God. The compassion shown to children and young adults is seen by the Sisters as demonstrating a strong Josephite ethos of care.

The Sisters noted that ecological awareness was something that had always been evident in the Josephite tradition and that a respect for all created things was paramount in a Josephite school community. The Sisters emphasised the tangible care for people, resources and the environment must be visible at all times. A respect and careful use of resources was seen by the Sisters as both an attitude and skill to be modelled and taught in a Josephite school.

4.11.5 Strategies to support a Josephite approach to education into the future.

According to the Sisters the explicit implementation of strategies and processes is necessary to support a Josephite approach to education into the future. Firstly, the Sisters noted a knowledge and incorporation of the characteristics of a Josephite approach to education must be explicit and overt in Congregational and diocesan processes for the selection and appointment of leaders to schools conducted
in the Josephite tradition. As one sister commented; “when leadership transitions take place there has to be a consciousness of the charism by those on the selection panel”. The Sisters agreed that the presence of a Josephite Sister or a panel member nominated by the Sisters was important for the Josephite perspective to be upheld in diocesan processes. Secondly, the Sisters commented on the need for ongoing dialogue with Bishops and diocesan personnel in the appointment of leaders to diocesan schools in the Josephite tradition to nurture the authenticity of a Josephite approach to education.

The Sisters acknowledged the explicit and practical strategies undertaken in the transition from religious leadership of diocesan schools in South Australia had enabled a strong Catholic Josephite identity to continue. These strategies included the joint appointment of a Principal by the Provincial of the Sisters of St Joseph with the Director of Catholic Education in the particular diocese. Other strategies such as ensuring all advertisements and interviews for the appointment of Principals included specific and overt reference to leadership in the Josephite tradition was seen to have established a strong culture of partnership between the Sisters, school leaders and diocesan personnel.

The Sisters reinforced the importance of incorporating such strategies to promote a strong Catholic Josephite identity of schools into the future. The Sisters advocated Congregational governance of schools owned by the Sisters of St Joseph as a means of maintaining a spiritual tradition and providing school leaders and the Sisters with a coherent way to proclaim the Gospel. The Sisters noted a Congregational governed school provided the Sisters with a context in which to express and continue the transmission of Charism while enabling school leaders to have direct involvement with the Congregation and its charism. The Sisters believed Congregational governance enabled the Sisters of Saint Joseph to sustain their mission of providing Catholic education to families in marginalised circumstances.

The Sisters reinforced the vital role the formation of school leaders played in enabling the Josephite tradition, charism and core values to be effectively transmitted through generations of leaders. As one Sister remarked: “the leadership in a school is responsible for ensuring staff formation takes place in the Josephite tradition, following in the legacy of Mary MacKillop”. The Sisters noted the transmission of charism relied on strong partnerships between the Sisters, school leaders and
diocesan personnel.

Finally, the Sisters affirmed the importance of the ongoing dialogue between the Sisters of St Joseph, Principals and diocesan personnel to clarify what the Josephite tradition calls the Sisters and school leaders to in their respective communities. The Sisters emphasised that conversations during formation and mentoring sessions of school leaders had a twofold benefit. Firstly, it enabled school leaders to have a strong knowledge of the Josephite tradition and its application in the 21st Century. Secondly, dialogue with school leaders enables the Sisters of Saint Joseph to be informed of evolving trends in Catholic education. The partnership between school leaders and the Sisters of Saint Joseph informs the story of Catholic education in the Josephite tradition.

4.12 Summary

Table 4.4 provides a summary of the key features underpinning a Josephite approach to education identified by the Sisters of Saint Joseph.

Table 4.4

*Key Features Underpinning a Josephite Approach to Education Identified by the Sisters of St Joseph*

<table>
<thead>
<tr>
<th>Key features underpinning a Josephite approach to education</th>
<th>Sisters of St Joseph</th>
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<tbody>
<tr>
<td>Formation in the Josephite tradition</td>
<td>Transmission of tradition through experience as a student, teacher and principal</td>
</tr>
<tr>
<td></td>
<td>Influence of Josephite women who modelled skills and practices</td>
</tr>
<tr>
<td>Characteristics of the Josephite tradition and approach to education</td>
<td>Unconditional love of God as compassion the underlying motive</td>
</tr>
<tr>
<td></td>
<td>Integration of faith, culture, life and learning</td>
</tr>
<tr>
<td></td>
<td>A strong value for kindness</td>
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<td></td>
<td>Access and affordability to Catholic education</td>
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<td></td>
<td>Child/ student centred learning</td>
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<td></td>
<td>Personal excellence</td>
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<td></td>
<td>Scaffolding learning and wellbeing</td>
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<tr>
<td></td>
<td>A commitment to hard work</td>
</tr>
<tr>
<td>Challenges in implementing a Josephite approach to education</td>
<td>Increased accountability and legislation</td>
</tr>
<tr>
<td></td>
<td>Responding to those families in marginalised circumstances</td>
</tr>
<tr>
<td></td>
<td>Leading and forming community through industrial concerns</td>
</tr>
</tbody>
</table>
4.13 Conclusion

The purpose of this chapter was to present the results of the collective case study based on the three research questions:

1. What do Principals and their leadership team in schools conducted in the Josephite tradition identify as the characteristics of the Josephite tradition in their respective school communities?

2. What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics underlying a Josephite approach to leadership in the context of the school community in which they serve?

3. In what way are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their leadership teams?

The results from each research question were presented as characteristics of the Josephite tradition identified by Principals and leadership team members. These characteristics were recognised as underlying a Josephite approach to leadership and evident in leadership practices. The results gained from the focus group interview with four Sisters of Saint Joseph, members of the Congregation and former Principals of Josephite schools in South Australia, provided a particular perspective of Josephite education and leadership. The Sisters’ perspective envisioned the elements of the tradition required for the continuing story of education in the Josephite tradition. Chapter Five, Discussion of the research results, provides an interpretive and analytical discussion of the data. The data presented for each of the three research questions is analysed alongside relevant literature.
Chapter Five  
Discussion of Results

5.1 Introduction

This study explored the concept of a Josephite approach to education and the ways in which it is implemented in schools conducted in the Josephite tradition. The discussion of results is divided into three sections based on the three research questions.

1. What do Principals and their leadership team in school conducted in the Josephite tradition identify as the characteristics of the Josephite tradition in their respective school communities?

2. What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics underlying a Josephite approach to leadership in the context of the school community in which they serve?

3. In what ways are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their leadership teams?

The aim of this chapter is to discuss the qualitative data collected through individual semi-structured interviews, focus group interviews, researcher field notes and document searches. The discussion is also in reference to the review of literature presented in Chapter Two and the Sisters of Saint Joseph focus group (henceforth referred to as the Sisters’ focus group). Table 5.1 outlines the structure of Chapter Five.

Table 5.1  
Outline of Chapter Five: Discussion of Research Results

<table>
<thead>
<tr>
<th>Section</th>
<th>Section Heading</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1</td>
<td>Introduction</td>
</tr>
<tr>
<td>5.2</td>
<td>Characteristics of the Josephite tradition</td>
</tr>
<tr>
<td>5.3</td>
<td>Summary</td>
</tr>
</tbody>
</table>
5.2 Characteristics of the Josephite tradition

This section discusses the characteristics of the Josephite tradition identified by Principals and their leadership teams in the six school communities. The discussion is divided into four subsections: characteristics identified by Principals; characteristics identified by leadership team participants; characteristics identified by Principals and leadership teams; and characteristics of the Josephite tradition identified by each Principal and their respective leadership team.

5.2.1 Characteristics of the Josephite tradition identified by Principals.

The characteristics of the Josephite tradition identified by the six Principals are discussed under four themes. These themes are: characteristics identified in the founding story; characteristics identified as core values in the Josephite tradition; characteristics identified in the unifying power of symbols and language; and characteristics identified in service to the community.

5.2.1.1 Principals and the founding story.

Principals reflected on the founding story to identify the characteristics of the Josephite tradition and observed that a lived experience of the tradition was necessary to re-interpret and re-imagine the story. Principals newly appointed to schools in the Josephite tradition especially recognised the impact of the founding story and the values expressed in their respective school communities. Principals were able to gain new insights into the spiritual tradition when the story was re-told, and the values re-interpreted in their community. Further, one Principal noted the founding story needed to be ‘heartfelt’ and that it took time and experience for the
story to move from a cognitive understanding to an affective experience. These experiences reported by Principals are supported by the literature which identified the importance of storytelling as a means of conveying spiritual traditions (Cook & Simmonds, 2011; Green, 2018; Sisters of St Joseph focus group, 2016). Literature also pointed to depictions of the ‘religious classic’ where words, texts, speeches and actions of the founding figures provide a foundation for re-interpretation that can never be exhausted (Arbuckle, 2013; Green, 2018; Tracy, 1981).

Principals who had experienced the Josephite tradition as a student, teacher and leader recognised the changing and dynamic nature of the Josephite tradition. For example, one Principal established the focus for the school year based on storytelling: “Once Upon a Time-Now!” The capacity of leaders to identify the characteristics of the tradition and to re-interpret and re-imagine it in the current context is reflected in the plethora of literature on the transmission of charism. For example, Marechal, (1999) highlighted that the relationship between charism and spiritual traditions provided leaders with a structure, a story, a way to pray and serve. Moreover, the experiences of these Principals in drawing on the founding story are reflected in the literature which emphasised the significance of the transmission of charism through storytelling (Chittister, 2017; Grace, 2010; Groome, 1998; Kelly et al, 2014).

Principals with extensive experience as teachers and leaders in Josephite schools conveyed their understanding of the tradition as accessible in the practical, down to earth ways in which it is experienced and lived. The Sisters’ focus group echoed the experience of Principals who were deeply immersed in the tradition as they too had grounded their experience of the tradition as student, teacher, leader and Principal. The Sisters reinforced the Principals’ experience of the tradition growing over time. These Sisters noted faith and prayer, a sense of fun, story and creativity were integral to the tradition. The research findings are consistent with the literature pertaining to tradition which states that with the integration of time, the tradition could be expressed as past, present and future (Groome, 1998). While the literature confirms the experiences of Principals steeped in the Josephite spiritual tradition, there is a paucity of research in the literature pointing towards the transmission of charisms into the next generation of leaders.
5.2.1.2 Principals and the Josephite tradition and core values.

All Principals identified core values derived from the tradition as a motivating force in their respective school communities. Principals considered charity and dignity as the ideal values underpinning relationships in their school communities. Several Principals gave examples where charity was expressed in and through compassionate actions in the care of students, staff and families. These experiences were reinforced by the Sisters’ focus group that emphasised the unconditional love of God as the motivating force in determining responses to the care and wellbeing of students. Principals across the six sites emphasised that charity and dignity enabled them to harness the energy of their staff in meeting the demands of each day. Several Principals related their experience of the Josephite tradition as ‘meeting families where they are at’ to hear their story and to help them to belong in the school community. The experiences were consistent with the literature that highlights when leaders draw on the tradition and charism they are inspired by the core values of charity, dignity and justice to serve others, bringing healing and hope, while orientating mission to those in marginalised circumstances (Confoy, 2013; Cook & Simonds, 2011; Goldburg, 2016; Grace, 2010).

Several Principals related challenging experiences in extending compassion in the ordinary and extenuating circumstances of each day. A similar observation was echoed by the Sisters of Saint Joseph. The Sisters identified hard work as a characteristic of the tradition in ensuring Josephite education is accessible and inclusive for families in marginalised circumstances. Principals in both rural and metropolitan schools observed that the tradition motivated them to have high expectations and at the same time to respond compassionately in challenging situations. For example, one Principal reflected on the challenge to enable a family experiencing the impact of marginalisation to have a sense of belonging and participation in the school community. Such research findings are substantiated in the literature whereby the prophetic nature of charism is seen to inspire courageous and bold action in responding to need when leaders embody beliefs and values inherent in a spiritual tradition (Dallaire, 2013; Rymarz, 2011).

Principals attested to the integrated nature of justice as a core value characteristic of the Josephite tradition. A Principal recently appointed to a Josephite school was surprised by the way justice was at the forefront of relationships and actions within the school community. This notion of justice had not been evident in
her previous school where justice was perceived as action taken for people or causes beyond the school community. Two Principals with extensive experience in Josephite schools highlighted justice as ‘fairness for all’ and cited examples, such as equitable access to technology, where all community members could expect ‘a fair go’. These responses from Principals are confirmed in the literature which identified Mary MacKillop’s example of integrating justice in everyday life stemmed from her belief in egalitarianism (Foale, 2016; Hull, 1995; McKenna, 2009; Warhurst, 2012).

5.2.1.3 Principals and the unifying power of symbols and language.

Principals identified the unifying power of symbols and language belonging to the Josephite tradition. This unifying power was experienced within individual schools and in networking with schools with the same tradition. The school motto, namely, ‘In Omnibus Caritas’ or a version of this original motto, shared by the six schools, provided a specific Catholic Josephite identity. One Principal, who had served as teacher, deputy and Principal in more than four schools in the Josephite tradition, recognised the unifying power of symbols and language in the expression of the spiritual tradition regardless of differing socio-economic contexts. Further examples of the unifying power of symbols and language were provided by Principals who commissioned artwork to reflect the local rural environment and its industries. The symbols used to convey the spiritual tradition were designed and created within the context of the school motto and Josephite tradition. The research findings resonated strongly with literature that acknowledged that spiritual traditions contain beliefs and practices, which, when expressed through symbol and language create meaning in liminal times (Arbuckle, 2013; D’Orsa & D’Orsa, 2015; Green, 2018). In particular, the findings are confirmed in the literature that points towards the value of reclaiming spiritual traditions with critical appreciation to provide energy, vision, purpose and direction in living the tradition (Green, 2018; Gowdie, 2017; Groome, 1998).

5.2.1.4 Principals and service to the community.

All Principals identified service to the community as key in the Josephite tradition stemming from the belief that God is at the centre of all that happens in a school community. For example, several Principals noted the challenge of serving and forming an inclusive faith and learning community so that all students, staff and
families had a sense of belonging and were able in turn to contribute their gifts in the service of others. Principals with extensive experience in schools in the Josephite tradition emphasised drawing out the gifts, talent and skills within the community as a powerful means of channelling these in the love and service of others. Similarly, The Sisters of St Joseph (Charter for Josephite Education, 1991) claimed the purpose of Josephite education was to empower students through education to love and serve others. These identified findings are reflected in the literature whereby service in simplicity and humility has the potential to give rise to courage and boldness in being for and serving community (Belmonte & Cranston, 2009; Brackley, 2004; Hull, 1995; Warhurst, 2012). Moreover, the literature advocates that if leaders are not deeply steeped in the tradition or have lost touch with its founding intuitions then they are unlikely to have much relevance or impact in a liminal time (Dutton & Kahler, 2017; Green, 2018).

5.2.2 Characteristics of the Josephite tradition identified by leadership Teams.

The characteristics of the Josephite tradition identified by leadership teams are discussed under four themes. These themes are: characteristics identified in the founding story; characteristics identified in storytelling, symbols and rituals; characteristics identified in service to the community; and characteristics identified as core values in the Josephite tradition.

5.2.2.1 Leadership Teams and the founding story.

Leadership team participants referred to the founding story and its core message of bringing human dignity and Christ’s love to those in marginalised circumstances as inspiring, guiding and directing their leadership. The founding story provided a source of inspiration in the day-to-day reality of their leadership roles. One participant identified the original mission articulated by Mary MacKillop as ‘our mission’, namely, bringing education and the love of God to all, particularly those in difficult circumstances. This understanding of mission is epitomised in the letter penned by Mary MacKillop encouraging her Sisters to “seek out the poorest and most neglected in God’s vineyard” (Mother Mary’s Circulars to the Sisters 1976, p. 205). Participants focused on the inspiration derived from the founding story which is reflected by authors who emphasised charism given as a gift to inspire others (Grace, 2010; Lyndon, 2009). Several participants identified the founding
story as encompassing a philosophy of education they could continually refer to as a guiding force for their work. Leadership team participants across the six schools emphasised the founding story as focusing their work on the student as learner and providing opportunities for all students. The Sisters’ focus group reiterated these experiences whereby the founding story and its charism provided inspiration, guidance and direction. The Sisters confirmed their formation was inspired by generations of Sisters whose example of valuing relationships, faith and prayer is central in their approach to education. The participants experiences are consistent with the plethora of literature on Charism which highlights charism as a gift to inspire others to meet a societal need and is a thread woven in current educational practice (Cook & Simonds, 2011; Clark, 2015; Grace, 2010; Green, 2018; Lyndon, 2009).

Several participants emphasised their school motto ‘In All Things Love’ linked them to the founding story and served as the basis upon which they met the ordinary daily demands in their work. For example, one participant, with a depth of experience and responsibility for leading staff and students in faith and spirituality, highlighted the need for staff members to continually return to the founding story and its spiritual basis to deepen their own spirituality for decision-making and action. The responses from participants is reflected in the literature which points to the influence founding stories and spiritual traditions have in the formation experiences of leaders (D’Orsa & D’Orsa, 2015; Green, 2018; Gowdie, 2017). While the plethora of literature on charism generally pertains to education it is not specifically concerned with the interface of charism and educational leadership in a Josephite approach to education.

5.2.2.2 Leadership teams and storytelling, symbols, rituals.

Leadership team participants referred to storytelling, symbols and rituals as a means of understanding and communicating the Josephite tradition in their respective school communities. Leadership team members in a rural school described how they annually ritualised and commemorated the story of a tragedy in their town involving Mary MacKillop and her early companions. The commemorative ritual provided staff and students with the opportunity to reflect on their own vocation and service by considering the values exemplified in the story. Another example of creating meaning and identity was provided by leadership team
members in a Congregational school who readily identified their school story through the names of their school buildings. Team members in this school perceived their close association with the Sisters living near the school site enabled a strong relationship to their school story. These experiences of charism and tradition conveyed through storytelling, rituals and symbols are highlighted in the literature whereby identity and meaning constructed through storytelling enables individuals and institutions to write and re-write their identity in particular contexts (Arbuckle, 2013; Cook & Simonds, 2011; Hatch, 2013).

The Sisters’ focus group recognised their formation in the tradition was grounded in the telling of stories and the rituals they observed as religious woman. Similarly, several leadership team participants referred to practical actions and daily rituals as a means of understanding and conveying the Josephite tradition. For example, a member of a leadership team in a rural school observed the ordinary daily action whereby the Principal greeted students and their families as they exited the school at the end of the day. This experience was a symbolic reminder of the practical ways in which families were valued. Similarly, the Sisters noted that the generations of Sisters before them had provided symbolic and practical examples of responding to families in the ordinary circumstances of life. For example, the Sisters were quietly present with families in times of grief, loss and illness. In addition, the Sisters provided families with the materials required for schooling such as books, uniforms, and support with school fees.

5.2.2.3 Leadership teams and service to the community.

Service to the community was a common theme identified by leadership team participants as core in the Josephite tradition. There was a strong focus on leadership in the service of students and their families, with emphasis on “walking with students” experiencing isolation or marginalisation. A leadership team participant observed that service expressed in developing strong partnerships with families was evidence of living the Josephite charism. Leadership team participants identified the challenges associated with serving families by ‘being with’ and ‘for families’ as integral to living the Josephite tradition. For example, participants working in schools in low socio-economic areas and in multi-faith and multi-cultural contexts, highlighted the struggle and joy encountered when developing partnerships with parents. One participant described his service by assisting families with limited English to complete forms and to understand the cultural nuances of education in
Australia. Other examples of service included working with families in times of stress and difficulty when concerned for a student and his / her learning and wellbeing. Clark (2015) echoed this experience by suggesting that God’s compassion is experienced through human action.

Participants recognised that the Josephite tradition shaped their work in forming partnerships with families, particularly when circumstances were challenging. The Sisters’ focus group reflected similar experiences of the significance of serving and responding to the circumstances of families. One Sister identified that the Josephite tradition was evident when families were served through education that was inclusive and accessible in and through finances, pedagogy, curriculum and the capacity for social participation. A further example of serving and valuing family partnerships was illustrated by a leadership team serving in a large metropolitan school surrounded by a rapidly growing housing estate. These leaders described the impact that an immersion experience in the suburbs surrounding their school had on them, helping them to understand the circumstances of families in the school’s enrolment catchment area. The responses from participants resonated strongly with literature that acknowledged the Josephite tradition values families and particularly their social wellbeing and access to education (Clark, 2015; Hull, 1995; Murphy, 1982; Warhurst, 2012).

5.2.2.4 Leadership teams and the Josephite tradition and core values.

Leadership team participants all considered the core values of charity, dignity and justice as a lodestone in their school communities. Several participants relied on these core values as a compass to direct, inspire and guide their decision-making and actions when facing difficult situations. Several participants emphasised the wholistic way the core values were integrated into the life of the school. For example, one participant identified this integration as most particularly evident in learning situations. Several participants recognised the continual reference to core values inspired them to serve those in need in their school community. For example, one participant referred to the significance of working with students and families to make sure that dignity is kept intact in all situations. This claim is reflected by the Sisters’ focus group who observed that the unconditional love of God was ideally the motivating force behind all leaders’ actions and behaviours. The Sisters further reinforced the experience of participants by noting the Josephite tradition ensured
the dignity of families was creatively responded to in a quiet practical way. The participants’ experiences are consistent with the general literature on charism and its inspiration, influence and impact on leadership (Confoy, 2013; Dallaire, 2013; Havey, 2014).

Leadership team participants across all six schools identified the integrated nature of justice within the school community as paramount in the Josephite tradition. Participants spoke of justice as ‘being seen to be done’ in school structures, policies and procedures within the school community. Leadership team participants cited the ways in which justice underpinned the provision and opportunity for inclusion in diverse learning experiences, highlighting the importance of forming and developing the humanity of young people. For example, one participant referred to the encouragement given to students to participate in wholistic learning opportunities. Several participants emphasised hospitality as an extension of justice, highlighting belonging and inclusion in learning and school activities as central in the Josephite tradition. Participants referred to experiences whereby they could constantly refer to the charism as a lodestone which drew them back to core values within the tradition. The participants responses were consistent with the Sisters of St Joseph archival materials which highlighted Josephite education focused on the human person as a reproach against injustice (Pickering, 1982; Murphy, 1982; Furthermore, recent literature reflected the research results that justice is effective when it is seamlessly integrated in pedagogy and the pastoral care of students (Dallaire, 2013; Dutton & Kahler, 2017 Warhurst, 2012).

5.2.3 Characteristics of the Josephite tradition identified by Principals and Leadership Teams

This subsection is a discussion of the strong link found in the results between Principals and their leadership teams in identifying the characteristics of the Josephite tradition. The similarities and minor differences in identifying the characteristics of the Josephite tradition will be discussed under four themes: the founding story; core values in the Josephite tradition; the significance of storytelling, symbols and rituals; and service to the community.
5.2.3.1 Principals and leadership teams – the Josephite tradition and the founding story.

Principals and leadership team participants identified the founding story as providing a source of ‘timeless inspiration’ in their school communities. According to both Principals and leadership team participants, the founding story gives a sound basis for the re-interpretation and re-imagining of the tradition. Similarly, both Principals and leadership team participants identified the founding story as providing a philosophy, a source of values and behaviours to guide and inspire their work as leaders. However, principals placed greater emphasis on the time required to internalise the tradition and the founding story so that it informed and influenced a pattern of behaviours. Alternatively, most leadership team participants placed emphasis on the founding story as a source of inspiration and motivation.

5.2.3.2 Principals and leadership teams – the Josephite tradition and core values.

Principals and leadership team participants all identified the core values of charity, dignity and justice as the fundamental bedrock of the Josephite tradition in their school communities. Both Principals and leadership team participants drew on their understanding of charity as the compassionate love of God in action. Principals stressed the challenge of integrating charity and dignity daily throughout the school and recognised this called for courage and boldness. In like manner, leadership team participants placed emphasis on enacting charity and dignity when integrating relationships within the school community. Principals were unequivocal in highlighting justice as underpinning their role in ensuring all families experienced a sense of belonging and inclusion in the school community. Similarly, leadership team participants highlighted the importance of justice as inclusion and accessibility to education. Furthermore, Principals and leadership team participants emphasised that the core values acted as a lodestone to return to in challenging situations.

5.2.3.4 Principals and leadership teams – the Josephite tradition and storytelling, symbols and rituals.

Principals and leadership team participants considered storytelling, symbols and rituals as a powerful means of conveying an understanding of the Josephite tradition. There was a close resemblance in the examples provided by Principals and
leadership team participants to demonstrate the importance of storytelling, rituals and symbols in re-interpreting the tradition. Principals emphasised the significance of storytelling, symbols and rituals as a means of conveying the beliefs, values and practices inherent in the Josephite tradition for the present time. Some leadership team participants placed emphasis on physical symbols, such as the names of buildings, as a means of communicating the Josephite tradition in their school community. Moreover, several leadership team participants emphasised the school emblem as the symbol encompassing the Josephite tradition.

5.2.3.5 Principals and leadership teams – the Josephite tradition and service to the community.

Principals and leadership team participants were unanimous in identifying service to the community as core in the Josephite tradition. There was a close alignment in the results gathered from Principals and leadership team participants across the six schools stating the importance of partnership in serving families and the community. Both Principals and leadership participants strongly emphasised, as central to their understanding of the tradition, the importance of being sensitive to family stories and reaching out to those in marginalised circumstances. Principals identified partnerships within and beyond the school community as the context for service. In like manner, leadership team participants identified practical examples where dialogue and daily practical acts of service were instrumental in serving the families in their school community.

5.2.4 Characteristics of the Josephite tradition identified by each Principal and his / her respective leadership team.

This subsection highlights the similarities and differences in the emphasis given by each Principal and his / her leadership team in identifying characteristics of the Josephite tradition. While there is strong connection between the characteristics of the Josephite tradition identified by each Principal and his / her leadership team, there appeared some differences in the emphasis given to various characteristics. For the convenience of the reader Table 5.2 provides a summary of the features of each of the six schools.
Table 5.2

*Key Features of the Six Schools in the Instrumental Case Study*

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<tr>
<td>Governance</td>
<td>SACCS</td>
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<td>SACCS</td>
<td>Trustees of Sisters of St Joseph</td>
</tr>
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5.2.4.1 Principals and their respective leadership team.

The Principal and her leadership team in School One emphasised that the characteristics of the tradition and its principles had been shaped over time. Both the Principal and leadership team participants identified the significance of storytelling in re-interpreting the tradition in the school community. The Principal expressed concern for the future transmission of the tradition considering the imminent retirement of long-term staff members whom she regarded as the ‘storytellers’. In contrast, some leadership team participants expressed concern for the impact new circumstances, such as the recent industrial conditions, were having on expressing the characteristics of the tradition in the present time.

The Principal in School Two identified the characteristics of the Josephite tradition as determining the behaviours and values impacting the present. This Principal stressed the importance of being explicit in identifying characteristics. Similarly, the leadership team in this school appreciated and relied on the Principal’s explicit identification of characteristics and values to inform their work. Furthermore, the leadership team participants recognised their innate sense of the tradition needed time and experience before being explicitly expressed in their leadership.

The results from the Principal and leadership team participants in School Three revealed a differentiation in identifying characteristics of the Josephite tradition. The Principal, having recently arrived at the school, was seeking meaning
in the storytelling, symbols and rituals identified by her leadership team. Unlike the Principal, the leadership team participants were well versed in the tradition and its story and were readily able to identify and integrate the core values of the tradition in their school community. In contrast to their Principal, the leadership team could identify the characteristics of the tradition as meeting a societal need in working in partnership with families each day.

The Principal and leadership team in School Four strongly emphasised the founding story provided a source of inspiration in their service to families. The core values integral in the Josephite tradition were considered by both the Principal and leadership team participants as a motivating force in the school community. The Principal recognised the tradition was a source of spiritual capital that he could draw upon to motivate and empower staff members. Similarly, leadership team participants drew on the founding story and the core values to ground their responses to families, particularly to those in marginalised circumstances.

The results from the Principal and leadership team in School Five revealed a strong consistency in emphasising the core values of charity, dignity and justice in the Josephite tradition as integral in the school and town community. The Principal was readily able to identify the practical and non-esoteric nature of the tradition, while leadership team participants provided practical examples of the explicit and visible integration of core values in the school community. The Principal emphasised the tradition, its principles and core values as timeless regardless of context. On the other hand, leadership team participants identified the increasing diversity in the community as re-shaping their understanding of the tradition and its core values in the present time.

The Principal and leadership team in School Six emphasised commonalities in the unifying power of explicit symbols derived from the Josephite tradition. On her recent arrival at the school the Principal observed the strength of the tradition conveyed through external symbols. Similarly, leadership team participants identified the external symbols in the school community as a powerful means of transmitting the Josephite tradition and the school’s story. Unlike leadership team participants, this Principal stated the need to explicitly integrate the core values expressed in these symbols into all aspects of student learning and wellbeing. While the Principal emphasised strong partnership with families in all aspects of the school community, the leadership team emphasised the need for explicit ‘storytelling’ with
students, staff and families as a means of conveying the Josephite tradition into the future.

5.3 Summary

The discussion of results implied all Principals recognised their role in making the implicit understanding of the Josephite tradition explicit in their respective communities. Leadership team participants were unanimous in identifying the core values as a lodestone to return to in difficult times. The results illustrated commonalities in the responses from Principals and leadership teams in identifying the significance of the core values conveyed through story-telling and rituals. The difference in emphasis given to characteristics by either Principals or leadership team participants could be explained by the nature, variety and responsibility commensurate with specific roles. For example, the emphasis Principals placed on characteristics often related to their role and perspective as the leader with ultimate responsibility for creating and enacting a vision. However, leadership team participants placed emphasis on the visibility and practical nature of characteristics unfolding in their respective school community because of their role in being the first contact for families. The minor differences identified between each Principal and his / her respective leadership team could be explained by the Principals’ length of time and experience of the Josephite tradition in the respective school community. The context of each school, be it location or size, could also be a contributing factor to the integral understanding of the Josephite tradition by both Principals and leadership team participants. Table 5.3 provides a summary of characteristics and experiences of the Josephite tradition identified by Principals and their leadership teams with reference to the review of literature.

Table 5.3
Summary of Characteristics of the Josephite Tradition Identified by Principals and Leadership teams.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Experiences</th>
<th>Reference to Literature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Founding Story</td>
<td>Tradition- timeless principles to be re-interpreted and re-imagined.</td>
<td>Groome (1998)</td>
</tr>
<tr>
<td></td>
<td>Time and experience required for</td>
<td>Sisters of St Joseph (2016)</td>
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<tr>
<td></td>
<td></td>
<td>Groome (1998)</td>
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<td>Tracy (1981)</td>
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## Core Values

- **Core values of charity, dignity and justice** are the fundamental bedrock of the Josephite tradition.
- **The challenge of integrating values** daily require boldness and courage.
- **Core values are a lodestone** to return to in challenging situations.
- **Inclusivity and belonging** are key in the tradition and necessarily integrated in student learning and wellbeing.

## Storytelling Symbols Rituals

- **Unifying power of symbols** hold the beliefs and practices in context of the school community.
- **Storytelling & rituals** provide meaning and identity in re-interpreting the tradition in the now.
- **Symbols provide a means of explicitly conveying** the tradition in local contexts.

## Service to the community

- **Relationships in context of local school, church and community.**
- **Partnership with families**, knowing family stories, entering dialogue, practice acts of service particularly for those in marginalised situations.

### Characteristics of the Josephite Tradition Underlying an Approach to Leadership

This section discusses the characteristics of the Josephite approach underlying leadership identified by Principals and leadership teams in the six school communities. The discussion is divided into four subsections: faith inspired...
leadership; leadership for mission; leadership and service; and leadership and formation.

5.4.1 Characteristics of the Josephite tradition underlying an approach to leadership identified by Principals.

The characteristics of the Josephite tradition underlying an approach to leadership as identified by Principals are grouped under four themes: faith inspired leadership; leadership for mission; leadership and service; and leadership and formation.

5.4.1.1 Principals and faith inspired leadership.

All Principals identified faith and prayer as key characteristics inspiring their approach to leadership in the Josephite tradition. A commitment in faith and to prayer were considered integral to leadership whereby Principals were conscious of the need to model and explicitly act from the basis of their faith. Several principals provided examples of witnessing to the gospels and being open to God’s spirit as an essential aspect of leadership. These Principals’ responses to faith inspired leadership are reflected in the literature which explicitly states the role of the Principal as the face of the Church and its best advocate (Gowdie, 2017; NCEC, 2005). The Sisters’ focus group was very explicit in identifying the capacity of the leader to integrate faith, life, learning and culture enables students, staff and families to access the faith dimension of the school community. Several Principals identified their faith as underpinning their leadership, noting they were aware of the need for visible and explicit expressions of joy, peace, and hope in the way they related as a leader.

Similarly, the Sisters’ focus group strongly emphasised the value for relationships and the integration of faith and prayer into all of school life as essential in the Josephite tradition. These Principals’ experiences were substantiated in the literature which pointed to the effectiveness of symbolic and practical witness inextricably woven through the role of Principal (D’Orsa & D’Orsa, 2015; Neidhart, 2014). Some Principals identified the strength gained from the example of Mary MacKillop’s faith in times of difficulty. Furthermore, the literature emphasised the fact that Principals are seeking support in the increasing demand of leading the faith community in a liminal time (Green, 2018; Gowdie, 2017; Neidhart, 2014; Ma & Ross, 2015).
5.4.1.2 Principals and leadership for mission.

Principals with considerable leadership experience in the Josephite tradition emphasised the importance of the inter-connection between their faith, the Josephite tradition and leadership for mission. One Principal noted the importance of integrity so that words and actions enabled the flourishing of human dignity central in a Josephite approach to leadership. Furthermore, Principals identified that constant reflection on their leadership was required so that they could empower, enable and facilitate their staff to do their best in contributing to the common good of the school community. The research findings are consistent with the literature on leading for mission and the vocation of a Catholic educator in the integration of faith, life, learning and culture (Bevans, 2009; Morris, 2012; Storz & Nestor, 2003). Several Principals noted that their belief in a compassionate God guided them in decision-making processes that would ensure inclusivity of all in the school community. For example, one Principal referred to decisions about technology and curriculum initiatives made in the interest of inclusivity.

The plethora of literature on Catholic social justice principles applied to Catholic education confirms the participants’ experience whereby the common good and a preferential option for the poor is a communal effort of both leaders, teachers and students in building a community that values everyone (Donlevy, 2008; Groody & Gutierrez, 2013; Gutierrez, 2009; Mucci, 2015). Some Principals identified creating an environment where staff members, students and their families were able to participate in decisions that impacted upon them. Other Principals cited examples of creating a climate where shared values assisted in responding to need in the school community. These findings point to the principles of social justice reflected in the literature whereby subsidiarity is considered to safeguard the initiative of schools (ACSJC, 2014; Cremers, 2017; Mele, 2005). Similarly, the literature confirms solidarity arises when shared values were embedded in policies and procedures (ACSJC, 2014; Beyer, 2014). In turn, the Sisters’ focus group observed that kindness to families in times of need was a visible sign of leading for mission. One Sister noted that kindness in word and action was a gateway to the heart of the gospels.

5.4.1.3 Principals and leadership for service.

Several Principals emphasised leadership in the Josephite tradition required them to serve from their personal and professional commitment, recognising the
vocational nature of leadership. Principals claimed servant leadership is central in a Josephite approach to leadership, accentuating humble service, witnessed in the life of Mary MacKillop, as a source of inspiration. Similarly, the Sisters’ focus group accentuated the notion of ‘walking with’ families as being the basis upon which all service is grounded. The research findings are consistent with the literature on servant leadership which reinforces the notion that servant leadership has a natural alignment with leadership in a Catholic context (Duignan, 2005; Gowdie, 2017) Most Principals recognised serving the community with an attitude of humility was required to ground their leadership in the day-to-day realities of school life. The findings from Principals resonated strongly with literature that acknowledged authentic educational leadership as vocation and ministry within the Catholic Church (CCE, 2014; Belmonte & Cranston, 2009; D’Orsa & D’Orsa, 2015; Neidhart 2014; Sultmann & Brown, 2016). Most Principals indicated a desire to serve from their personal and professional commitment in spite of the increasing challenges and demands of accountability. However, there appeared to be limited literature identifying the impact of increasing accountability on educational leadership as a vocation and ministry in a liminal time in the Catholic Church and society.

5.4.1.4 Principals and leadership formation.

All Principals identified a commitment to their own formation as key in a Josephite approach to leadership. Several Principals recognised their formation in the Josephite spiritual tradition over time had enabled an integration of core values for ‘meaning making’ in leading for justice and mission. Principals in the initial years of their appointment valued formative experiences in the Josephite spiritual tradition as orientating their leadership in serving those in marginalised situations. Several Principals identified ongoing formation in the spiritual tradition as a source of empowerment, both individually and collectively, in meeting challenging situations and contexts. In particular, one Principal identified that her formation was complemented by a formal leadership program.

The responses from Principals resonated with the plethora of literature concerned with the formation of Catholic school leaders (Connolly, 2015: Duignan, 2007; Gowdie, 2017; Green, 2018; Neidhart, Lamb and Spry, 2012). In particular, the literature advocated informal and formal formation experiences were necessary
for a new religious consciousness and transformation in theological, spiritual and educational leadership (Pollefeyt & Bouwens, 2010; Gowdie, 2017; Sharkey, 2015). However, there appears to be limited research recorded in the literature of the influence formal leadership programs have on the personal formation of leaders.

The Sisters’ focus group emphasised the value of the ordinary daily care for people and things as formative experiences if leaders had the capacity for reflective practice. Furthermore, research conducted by Neidhart and Lamb (2016) reported that leaders are seeking support to develop more effective faith leadership behaviours and professional and spiritual competencies.

5.4.2 Characteristics of the Josephite tradition underlying an approach to leadership identified by leadership teams.

This subsection is a discussion of the results of what leadership teams across six schools identified as the characteristics underlying an approach to leadership in the Josephite tradition. The results from leadership teams are discussed under four themes: faith inspired leadership; leadership for mission leadership and service; leadership and formation.

5.4.2.1 Leadership teams and faith inspired leadership.

The results from several leadership team participants identified the Josephite tradition as a lens through which to view and act on the message of the gospels. Most leadership team participants could identify the Josephite spiritual tradition as underlying their leadership. Moreover, participants with responsibility for faith formation and spirituality recognised spiritual awareness was required for leaders to witness to the gospels, particularly in outreach to those in marginalised circumstances. The responses from participants are consistent with the literature pertaining to the integration of spirituality and faith in witnessing to gospel values in leadership practice (D’Orsa & D’Orsa, 2015; Ma and Ross, 2015; Neidhardt, 2014; Sharkey, 2015; Thompson, 2005)

The results indicated that some leadership team participants could readily identify compassion and humility as a means of witnessing to the gospels. Specifically, one participant emphasised the value ‘of being’ rather than ‘doing’ as compassion expressed in the school community. Leadership team participants
emphasised the practical ways in which spirituality and faith were integrated in a Josephite approach to leadership. For example, several leadership team participants stressed the importance of being consistent in witnessing to Christ in what is said and done in their compassionate response to others. Some leadership team participants were aware of an attitude of humility when responding compassionately to the joys and struggles of others. Other leadership team participants expressed the challenge of consciously and explicitly communicating their faith to others. The experience of leadership team participants was reflected in literature which emphasised that a leader’s capacity to engage in lifelong spiritual growth, to nurture that in others, and to be well versed in theology, underpins leadership in Catholic education (Congregation for Catholic Education, 2014; Gowdie, 2017; Hellwig, 1998; NCEC, 2005; SACCS, 2015b).

5.4.2.2 Leadership teams and leadership for mission

The response from leadership team participants revealed a pragmatic alignment of the characteristics of the Josephite tradition with mission. This alignment relied on the practice of Catholic Social Justice Principles such as human dignity, common good, option for the poor, subsidiarity and solidarity underpinning a Josephite approach to leadership (Catholic Church, 2006; Cornish, 2009; Warhurst, 2012). Participants reported that their belief in a child’s human dignity influenced their view of education. All leadership team participants emphasised care for the dignity of individuals by attending to their wellbeing and responding creatively when students were impacted upon by trauma and isolation. These examples were confirmed in the literature whereby the teacher’s beliefs and practices were a means of serving the child (Rinaldi, 2017; Mucci, 2015; Cameron, 2013, cited in Elshof, 2015). Leadership team participants cited examples of an option for the poor (ACSJC, 2014) when creating access to learning for all students, especially in responding to the myriad of needs presented daily.

Several leadership teams emphasised that grounding core values such as dignity, charity and justice, when working with families, led to solidarity in the school community. The literature pointed to ethical care, mutual service and co-responsibility as a means of creating solidarity (Beyer, 2014; Constable, 2012; Guitierrez, 2009). Leadership team participants emphasised their value for shared leadership as a means of being able to participate and contribute to the school’s
vision and mission. Their examples of shared leadership were reflected in collaboration with each other and in developing networks within the local and wider community. Leadership team participants reported being inspired by their school’s mission, and vision to find ground breaking ways of nurturing dignity and charity when responding to challenging circumstances for students and families. These examples are reflected in the literature which advocates for the common good and subsidiarity to be nurtured in Catholic schools (Constable, 2012; Mele, 2005; Scanlan, 2010).

5.4.2.3 Leadership teams and Leadership for service.

Leadership team participants were unequivocal in emphasising that their service was focused on creating an inclusive learning community. Several leadership team participants cited examples of the way they worked with students experiencing marginalisation be it in relationships, social participation, use of technology or difficulties in learning. Furthermore, the Sisters’ focus group claimed the hallmark of Josephite education relied on teachers and leaders focusing on each students’ learning and wellbeing to develop confident, skilled learners with a capacity to love and serve others. The participants and Sisters’ reflections were substantiated in the literature which highlighted that Catholic educators are challenged to critique curriculum policy and practice in responding to those in poor circumstances (Gleeson, 2015; Grace, 2015).

Several participants referred to the humility they observed in the Sisters of St Joseph and in the life of Mary MacKillop as an essential feature of serving others. Such responses resonated with the literature on servant leadership where humility was considered to enable the inner authority of leaders to be expressed in solidarity and service of others (Brackley, 2004; Clark, 2015). Most participants emphasised their service as being receptive to each family story to address symptoms of marginalisation demonstrated in the learning and /or wellbeing of students. Moreover, the Sisters’ focus group specifically recognised service to families was marked by listening, hard work, determination, creative and lateral thinking to create the best educational experiences regardless of location. Participants identified listening and lateral thinking as essential when mediating situations to enable students to access and experience inclusion in learning and wellbeing. The participants’ experiences align with the literature concerned with the dignity of the
child where Rinaldi (2017), Wall (2010) and Bunge (2004) claimed the capacity for listening was the premise of the educational relationship in nurturing and serving the dignity of students.

The participants’ experiences of service, listening, humility and nurturing dignity were reflected in the plethora of literature on servant leadership, identifying that the use of power as a servant leader relied on the influence of self-giving without self-glory in serving the needs of others (Black, 2010; Greenleaf, et al. 1996; Stone et. al., 2004). Participants were able to describe the action taken to serve others. However, only a few participants were explicit about this service being modelled on the gospel. Whereas there is a significant body of literature on servant leadership that emphasised the gospel tradition of Jesus’ teaching on leadership is essentially one of service to the other (CCE, 2014; Lavery, 2012; Nsiah & Walker, 2013; Neidhart, 2014; Punnachet, 2009).

5.4.2.4 Leadership teams and formation.

The results from the leadership team participants indicated that their formation as leaders took place both formally and informally. Several leadership team participants shared examples of informal experiences whereby their Principal’s non-hierarchical leadership style enabled them to contribute and participate in decision-making processes. These participants considered that reflective practice in the everyday circumstances enabled the integration of professional skills with the Josephite spiritual tradition. The participants’ reflections resonated in the literature which emphasised that communal reflection grounded decision-making in the ‘nitty gritty’ of school life (D’Orsa & D’Orsa, 2013; Rooms & Ross, 2014; Sharkey, 2015; Kinast, 2000). Similarly, the Sisters’ focus group reflected on the proactive and collaborative ways in which teachers and leaders shared their knowledge and skills to make things better for students, teachers and families.

Leadership team participants who engaged in formation such as mentoring and professional leadership programs, valued experiences that developed reflective practice. In particular, participants appreciated formation experiences that honoured the context in which they served. These participants responses were reflected in the literature which emphasised leadership formation grounded in a Catholic rich tradition is effective in leading school communities (Grace, 2010; Gowdie, 2017; Neidhart, 2014). All participants revealed a value for ongoing formation, both
formal and informal, in strengthening the integrity of their leadership. While most participants expressed an openness to ongoing formation, the literature emphasised that formation in faith was an urgent priority and that time and resources were required to support leaders in this central feature of their leadership (Neidhart & Lamb, 2016; Neidhart, Lamb & Spyr, 2012; Camilleri, 2017; Green, 2018; Gowdie, 2017; NCEC, 2017). Gowdie (2017,) made a similar observation when she identified that the formation of leaders in Catholic education was a “sleeping giant” (p. 7) with the power to enrich the Catholic identity of schools.

5.4.3 Characteristics of the Josephite tradition underlying an approach to leadership identified by Principals and leadership teams.

This subsection is a discussion of the similarities and differences in the results identified by Principals and leadership team participants in identifying the characteristics underlying an approach to leadership in the Josephite tradition. The results from Principals and leadership team participants are discussed under four themes: faith inspired leadership; integrity in leadership for mission, leadership and service; leadership and formation. There is a strong correlation in the results gained from Principals and leadership team participants. However, there is a slightly varying emphasis on characteristics depending on the perspective of either Principal or leadership team participants because of their specific leadership role and the context of the school community.

5.4.3.1 Principals and leadership teams and faith inspired leadership.

Most principals and leadership team participants identified leadership inspired by their faith as crucial in a Josephite approach to leadership. Whereas Principals were explicit in stating faith as integral to their role, leadership team participants reflected on the ways in which the gospel values were an inspiration for their work. Various Principals strongly emphasised their expression of faith was closely aligned with the Josephite tradition which gave them a language in which to express their beliefs, and values in leadership. Several Principals were conscious of the responsibility they had to ensure their faith was embodied and explicitly modelled in prayer, words and actions in leading staff, students and the school community. Leadership team participants who had extensive years of experience recognised their responsibility to pass on the values and continue to create meaning
for students. Principals and leadership teams in schools in rural areas identified the integrated and formal nature of their faith leadership expressed in the town, parish and diocesan community. Both Principals and leadership team participants reflected on the language of the tradition that enabled them to express their faith in ways that were familiar, down to earth and accessible for families.

The greatest difference in emphasis between Principals and leadership team participants was the recognition by Principals of their responsibility in aligning leadership inspired by faith in the Josephite tradition with current reality in school and parish communities. Most leadership team participants made general reference to their leadership in faith as school based compared to the Principals who identified their leadership required influence in the local parish, diocesan and congregational communities in which they served. Several leadership team participants expressed the desire to be more explicit in their faith leadership in the practical circumstances of working with families, recognising the challenges that a multi-faith and highly secularised context presented. The results indicated a strong correlation in the emphasis Principals and leadership team participants placed on the founding story, its language and symbols and core values as underpinning a visible witness to faith inspired leadership. Moreover, the Sisters’ focus group observed the transmission and integration of faith, life and culture in a Josephite approach to leadership enabled the Catholic tradition to be accessible and relevant in the lives of students and their families.

5.4.3.2 Principals and Leadership teams and integrity for mission.

Both Principals and leadership team participants emphasised the significance of the Josephite tradition being expressed in and through the school’s mission and vision statements. The results suggested that Principals and leadership team participants regularly referred to the school’s mission and vision statement. Most Principals emphasised the line-of-sight required to ensure consistency and integrity between words, actions and practice in their school community. Several leadership teams referred to examples where their vision statement was not something that ‘gathered dust’ but was the basis of decision-making. Principals provided examples of their role in facilitating, empowering and encouraging their leadership teams to reflect on their action and practice considering the vision statement. One Principal referred to a process of ‘cross checking’ to ensure what was said and done reflected
integrity with the school’s vision and mission. Some leadership participants observed that in difficult and stressful times a return to the vision statement provided a touchstone for what was important.

Principals reflected on the increasing difficulties of breaking open the Catholic tradition when meeting families during enrolment interviews yet recognised the Josephite tradition provided them with the opportunity to ground a faith perspective in education. Similarly, leadership team participants recognised the challenges associated with the practical application of the tradition when there was some dissonance in working with students and families. While several Principals observed their own role demanded vigilance to create and articulate vision, most leadership team participants sought direction and leadership from their Principal in the implementation of vision. The Sisters’ focus group observed that it was essential for Principals to create a shared vision promoting solidarity and a spirit of co-operation to enable all difficulties and divisions to be overcome.

5.4.3.3 Principals and Leadership teams and service.

Both the Principals and leadership team participants placed a strong emphasis on servant leadership underlying an approach to leadership in the Josephite tradition. Several Principals referred to their role as ‘bringing out the best in people’. Another Principal described her model of leadership as acting in non-hierarchical ways to empower others. One leadership team ratified this experience referring to their role as stewards and custodians. Furthermore, some leadership team participants identified relationships, participation and the capacity to be trusted as providing them with opportunities to witness to the Gospels in serving students and their families. Several Principals, who had been immersed in the Josephite tradition, expressed their appreciation and understanding of values that underpinned a servant style of leadership. One Principal noted the commitment required to ensure values such as compassion and humility underscored daily interactions. Similarly, several leadership team participants emphasised service and responding to need in the care of students and families as an expression of compassion and humility.

Principals and leadership team participants stressed the importance of understanding humility as essential in an approach to leadership that had service as its basis. For example, one Principal had been advised ‘not to be so humble’ by an external observer of the school’s achievements. This Principal felt there were misconceptions about serving with a humble spirit as was evident in Mary
Mackillop’s practical and down to earth approach to leadership. Similarly, leadership team participants drew on the inspiration of the humility observed in the Sisters of St Joseph as getting on with things without fuss. Moreover, the Sisters’ focus group considered a wholistic approach to daily experiences of learning, liturgy and administration were powerful vehicles to express the compassionate love of God and to serve and give witness in the faith community. One Sister observed that the ministry of Catholic education in the Josephite tradition continued to provide school leaders and the Sisters with the opportunity to be the very best of the compassionate Church.

5.4.3.4 Principals and Leadership teams and leadership formation.

Principals and leadership team participants expressed a value for formation experiences as essential and desirable in shaping their leadership in the Josephite tradition. While there was a strong coherency in valuing formation between Principals and leadership team participants, there was a distinction in the type of formation experienced. Principals valued their initial formation in leadership be it working alongside the Sisters or in formation programs that provided them with context, values and the capacity to recognise the charism in themselves and others. Leadership team participants, however, placed a value on the daily formation taking place in their participation as a leadership team member. Most Principals recognised their responsibility in building leadership capacity among their staff, although several Principals in the early months of their leadership in the school community noted their reliance on leadership team members to identify the impact of tradition and charism.

Most Principals emphasised the need for ongoing formation where solidarity with other leaders of schools provided collegial and collective strength in meeting the increasing challenges of leadership. Some leadership team participants noted their formative experiences in the Josephite spiritual tradition gave them courage to challenge what they perceived as the status quo in education and the wider community. These formative experiences resounded with the observation of the Sisters’ focus group who reinforced the vital role the formation of school leadership played in transmitting the charism through generations of leaders. The Sisters claimed the transmission of charism relied on strong partnerships between the Sisters, school leaders and diocesan personnel.
5.4.4 Characteristics of the Josephite tradition underlying an approach to leadership identified by each Principal and his/her respective leadership team.

This subsection is a discussion of the similarities and differences in the results reported by each Principal and his/her leadership team in identifying the characteristics underlying an approach to leadership in the Josephite tradition. The results from each Principal and his/her leadership team are discussed under four themes: faith inspired leadership; integrity in leadership for mission, leadership and service; and leadership and formation.

5.4.4.1 Principals and their respective leadership team.

The Principal and her leadership team in School One recognised that the characteristics underlying a Josephite approach to leadership were embedded in the culture of the school community. There was a strong link in the results between the Principal and leadership team participants in the emphasis given to the founding story and core values influencing the way ‘things are done in the school community’ as exemplified in the actions of leaders. Whereas the Principal reflected on her desire for the integration of faith, learning and culture in the changing context of 21st century education, her leadership team expressed some dissonance in what they perceived was a ‘new culture of professionalism’ posing a threat to cultural traditions. For example, some leadership team participants expressed their concern for what they saw as the imbalance between workload and affirmation of staff in shaping the culture of the school. While the Principal identified the core values as the basis for relationships within the community expressed in symbolism, some leadership team participants emphasised a strong desire and responsibility to communicate the tradition in language, symbol and story to the new generation of staff and families in the community. Some leadership team participants expressed concern in what they perceived as the competitive marketing strategies employed and expressed a desire to ‘hold on’ to humility and simplicity in embedding leadership in the school community. The results from the Principal and her leadership team in School Two highlighted a strong commonality in identifying characteristics underpinning a Josephite approach to leadership. There was a powerful connection in the examples given by both Principal and leadership team participants to suggest a seamless alignment of purpose and practice. The Principal
emphasised that service to families was the driver for ensuring access and affordability to Catholic education.

Similarly, leadership team participants emphasised the partnership formed with families as underlying their approach to leadership. Both the Principal and leadership team participants were conscious of the difficult economic circumstances impacting on the community. This context accentuated characteristics such as accessibility and inclusiveness in responding to families. The manner in which the Principal and her leadership team responded with compassion, creativity and courage to circumstances beyond the school's control attested to the Josephite core values embedded in the school and its community. The compatibility in results could be explained by the Principal’s extensive leadership experience, knowledge of the town community, vision and practice in building the capacity of middle level leaders.

The results from the Principal and her leadership team in School Three implied some differences in the identification of characteristics underpinning a Josephite approach to leadership. The Principal, for example, emphasised physical symbols of the tradition and social justice characteristics recognised by students in their leadership formation and student activities. She noted her experience of an industrial matter created some incongruence for her when considering the school emblem. By contrast, most leadership team participants were steeped in the Josephite tradition and readily identified characteristics integrated into leadership such as compassion, inclusion, accessibility when working with staff, students and families. The differences in emphasis between the Principal and leadership team participants could be explained by the Principal’s limited formation in the Josephite tradition. In comparison, leadership team participants recognised they modelled their leadership on the formation received when working directly with Principals who were Sisters of St Joseph.

The Principal and his leadership team at School Four recorded similar responses in identifying the characteristics underlying a Josephite approach to leadership. The Principal emphasised his formation was influenced by the compassion he had observed in the Sisters of St Joseph with whom he had worked as a colleague and staff member. Similarly, leadership team participants referred to their formation as informed by the daily experience of working in various schools in the Josephite tradition and in dedicated staff formation sessions. While the Principal expressed his innate understanding of the core values as motivating his leadership,
he emphasised the constant challenge to be explicit when communicating these values to staff and the school community. At the same time, leadership team participants could give examples of the constant challenge of grounding the core values such as dignity and charity in the circumstances of the learning and social environments in which students and families gathered each day.

The results from the Principal and her leadership team in School Five emphasised consistency in the integration of mission, tradition and values in the school and town community. This Principal provided explicit examples of the integration of faith, life, culture and learning with the symbols, stories and her own behaviour as a leader. Leadership team participants noted they were inspired by their Principal’s capacity to integrate gospel values in all areas of her practice. The Principal reflected her belief in the sustainability of the tradition when leaders internalise values and are explicit in the integration of these values in school practices. For example, this Principal reflected on a conflict situation resulting in a dignified outcome for all as a formative experience for herself and her leadership team in holding onto values in difficult circumstances. Likewise, leadership team participants referred to examples where they had been encouraged by their Principal to ensure core values such as dignity and inclusivity underpinned their leadership.

The Principal and her leadership team in School Six recorded commonalities in identifying characteristics underlying a Josephite approach to leadership. The Principal emphasised the strength of compassion required in creating an environment where inclusivity and high expectations nurtured the dignity of students and their families. In similar manner, leadership team participants observed the ‘earthy’ hospitality found in the Josephite tradition as a form of justice in responding to circumstances creating marginalisation. While this Principal observed the liminal circumstances faced by the school and Congregation, she was adamant the school community needed to remain grounded in the core values of the Josephite tradition for integrity of mission and tradition. Leadership team participants also reflected on the ways in which their formation as leaders, and that of all staff members could take place. Both the Principal and leadership team participants recognised formation experiences contributed to the strength of leadership in their school and in the Association of Josephite Affiliated schools in Australia and New Zealand.
5.5 Summary

Overall, there was a strong consistency in the results gained from Principals and respective leadership team participants in identifying characteristics underlying a Josephite approach to leadership. Any variation in the emphasis given to characteristics underlying leadership seemed to relate to the perspective of either Principals or leadership team participants in their specific leadership role and the context of the school community. The commonalities reported could be explained by the coherency of faith experience within the Josephite tradition. The Principals’ common experiences of formation in the Josephite spiritual tradition could explain the consistency in which Principals identified the characteristics underlying a Josephite approach to leadership. The difference in emphasis placed on varying characteristics by some Principals seem to link with their experience of collegiality with the Sisters of Saint Joseph, the context of the school community and length of time Principals had served in the school.

The results recorded from Leadership team participants imply the power of formative experiences relied on the capacity to reflect on the practical situations encountered each day. Furthermore, the role of the Principal in developing leadership capacity in a Josephite approach to leadership was influential for those leadership team participants seeking a more explicit expression of the tradition in their leadership. A strong link in the results between Principals and leadership team participants in identifying characteristics underlying an approach to leadership could be explained by the Josephite spiritual tradition and core values embedded in their respective school. The difference in emphasis could be explained by the extent to which values are internalised and integrated within personal faith and professional commitment.

While there is compatibility in the results between each Principal and his / her leadership team, the differences could be attributed to the Principals’ role in creating and enacting a vision for the school community. Leadership team participants, on the other hand, had a more pragmatic approach to enacting the vision due to their specific role in the school community. The areas of dissonance recorded between Principals and his / her leadership team appear to be linked to the length and depth of formation and experience in the tradition. Table 5.4 summarises the characteristics and experiences underlying a Josephite approach to leadership by Principals and leadership team participants with reference to the review of literature.
Table 5.4

*Summary of Characteristics Underlying a Josephite Approach to Leadership by Principals and Leadership Teams.*

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Experiences</th>
<th>Reference to literature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faith Inspired Leadership</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Responsibility to pass on ingrained and inherent faith</td>
<td>Neidhart &amp; Lamb (2016)</td>
</tr>
<tr>
<td>Coherency of mission with tradition</td>
<td>Core values a source of strength to ‘hold onto’ in difficult circumstances.</td>
<td>Finucane (1982)</td>
</tr>
<tr>
<td></td>
<td>Principals have the responsibility for capacity building of leadership team. participants and staff.</td>
<td>NCEC (2017) SACCS (2015b)</td>
</tr>
</tbody>
</table>
Formation experiences need to be explicit in sustaining mission, tradition and values.

<table>
<thead>
<tr>
<th>Service to the community</th>
<th>People orientated leadership and developing trust is a priority at all times.</th>
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<tbody>
<tr>
<td></td>
<td>A non-hierarchical style of leadership enables participation and bring out the gifts of the community.</td>
</tr>
<tr>
<td></td>
<td>Humility and compassion empower, inspire and facilitates service in reducing the impact of marginalisation.</td>
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<table>
<thead>
<tr>
<th></th>
<th>Duignan (2007)</th>
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<tr>
<td></td>
<td>Neidhart (2014)</td>
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<td></td>
<td>Sultmann &amp; Brown (2016)</td>
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<thead>
<tr>
<th></th>
<th>Murphy (1982)</th>
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<th>Belmonte &amp; Cranston (2009)</th>
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<td>Neidhart (2014)</td>
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<tr>
<th></th>
<th>Brackley (2004)</th>
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<td>CCE (2014)</td>
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<td>Tolliver (2016)</td>
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5.6 Characteristics about a Josephite Approach to Education Evident in the Leadership Practices of Principals and Leadership Teams

This section reviews the ways in which the characteristics of a Josephite approach to education are evident in the leadership practices of Principals and their leadership teams in the respective school communities in which they serve. The results from the Principals and leadership teams across the six schools are discussed under four themes: coherency of mission with tradition and practice; excellence and rigour; serving families and forming inclusive community; and the relevance of Josephite principles and core values. The discussion is considered in light of three models of leadership: transactional, transformational and transcendental.

Characteristics about a Josephite approach to education evident in leadership practices of Principals.

The results from Principals indicated commonalities in the ways characteristics about a Josephite approach to education were evident in their leadership practices. Principals demonstrated transactional, transformational and transcendental leadership in varying ways and circumstances. What follows is the extent to which these leadership models are enacted in a Josephite approach to education.

5.6.1.1 Principals – coherency of mission with tradition and practice.

Principals demonstrated a combination of transactional, transformational and transcendental leadership in aligning mission with tradition, vision and practice. For
example, Principals demonstrated transactional leadership when reviewing and implementing administrative structures, practices and procedures. Principals cited examples where structures and processes were important in leading for mission. Such examples were reinforced in the literature which identified transactional leadership as providing clear delineations of roles and responsibilities to strengthen the leaders’ capacity for leading others (Covey, 2004; Glasson, 2010; Lavery, 2011; Marzano, Waters & McNulty, 2005).

Several Principals provided examples of vigilance in creating a vision and leading strategically to encourage and give direction to staff members and the school community. Principals demonstrated evidence of transformational leadership when structures and procedures were implemented as a vehicle for promoting dignity, fairness, equity and access to Catholic education. Furthermore, Principals cited examples of adopting an educative approach in the formation and implementation of policies when introducing change in the community. These examples are substantiated in the literature which emphasised that transformational leaders articulate a vision in an appealing manner to instil confidence and empower those they lead (Bass 2002; Yukl, 2008). Most Principals were aware of the importance of integrity in their leadership to motivate their school community so that creativity and innovation could thrive in reframing problems. Such awareness was confirmed in the literature whereby the leader’s integrity was seen to garner a commitment to shared goals in leading for mission (Caldwell et al., 2012; Cardona, 2000; Friedman, 2004; Stone et al., 2004).

Principals reflected transcendental leadership when attending to relationships at the heart of their vision for the school community by serving the variety of needs presented daily. In like manner, the Sisters’ focus group noted relationships needed to be attended to where listening and self-giving were the premise for all service. Several Principals cited examples of drawing on their faith and the Josephite spiritual tradition to guide them in being true to the school’s tradition, mission and values in serving the community. The Principals’ and Sisters’ experiences resonated strongly with literature that acknowledged transcendental leadership is evident when leaders nurture relationships by appealing to the intrinsic motivation of those with whom they served (Cardona, 2000; Nsiah & Walker, 2012; Sanders et al., 2003).
5.6.1.2 Principals, excellence and educational rigour.

Various Principals demonstrated transformational leadership when they emphasised their vision for excellence and rigour by providing quality teacher formation and professional development. Principals cited examples of sharing their vision for teaching and learning with staff members coupled with the development of professional learning plans. Furthermore, transformational leadership was evident when Principals were concerned with skilling teachers in the design and implementation of rigorous and holistic learning. These examples resonated with the literature which emphasised that vision, direction, individual consideration and intellectual stimulation were characteristic of transformational leadership (Bass et al, 1996; Stone et al., 2004). Transformational leadership was evident when Principals cited examples of how ongoing formation in the Josephite spiritual tradition and professional development empowered them to respond with creativity and flexibility to new challenges. The issues of creativity and flexibility are reflected in the literature whereby innovation, creativity, questioning of assumptions and reframing of problems is required in a complex and rapidly changing educational environment (Crowther, 2002; Fullan, 2014; Lavery, 2011).

5.6.1.3 Principals serving families and forming an inclusive community.

All Principals demonstrated elements of both transformational and transcendental leadership in serving families and forming inclusive community. Transformational leadership was evident when Principals created a shared vision in the service of families and the community. For example, Principals sought to build strong relationships with students, staff members and the parent and wider community through consultation and dialogue. Most Principals cited examples of serving the community by listening with compassion and empathy in difficult situations, enabling the growth of people and the community. Both Principals and the Sisters’ focus group emphasised the importance of ‘walking with families’ as the basis for all service. Such examples of serving families and forming inclusive community resonated with the literature which emphasised that transformational leadership requires engagement and connection between the leader and other people (Lavery, 2011).

Several Principals provided examples of creating a culture where staff members were encouraged to respond with practical compassion to the
circumstances of families. These findings are consistent with the plethora of literature on servant leadership, a key component of transcendental leadership (Lavery, 2012; Rebore & Walmsley, 2009), which confirmed that freedom and trust along with the tenants of caring and ethical behaviour characterised service of others (Black, 2010; Greenleaf, 1973, cited in Frick, 2004; Schafer, 2005; Stone et al., 2004; Page & Wong, 2000). At times, the results indicated a mix of traits featured in transformational and transcendental leadership. Principals demonstrated transcendental leadership when they integrated their faith, spirituality and self-awareness to inform decision making and discernment in the service of others.

Some Principals demonstrated transcendental leadership in valuing self-awareness in the care of students, staff and parents when forming community. Furthermore, elements of transcendental leadership were evident when Principals emphasised the vocational nature of their leadership as both a personal and professional response in serving the community. These experiences resonated with Marzano, Waters, and McNulty (2005) who reported a significant correlation between servant leadership and school climate.

Several Principals demonstrated the relationship between service and spirituality, core to transcendental leadership, when they drew on the Christian scriptures and gospels as a source of inspiration. Moreover, Principals cited examples of relying on faith and the spiritual dimension of their leadership when faced with challenges in forming an inclusive learning community. These research results are consistent with literature that acknowledges transcendental leadership relies on the leader’s capacity to transcend his or her own self-interest for the greater good of the community (Cardona, 2000; Nsiah & Walker, 2013; Sanders et al., 2003). Most Principals recalled images and metaphors of servant leadership from the gospels to highlight their inspiration for leadership as service. Literature reiterated the Principal’s responses in that servant leadership and its relationship with transcendental leadership was increasingly popular as a model for leadership of a Catholic school (Gowdie, 2017; Nsiah & Walker, 2013; Lavery, 2012). While Principals did not differentiate when servant leadership was most effective, the literature indicated that the servant leadership modelled by Jesus Christ was often evident in times of adversity (Bass, 2000; Black, 2010; Greenleaf, 1991, cited in Punnachet, 2009).
5.6.1.4 Principals and the relevance of Josephite principles in leadership Practices.

The responses from Principals that illustrated transcendental leadership was evident when the Josephite Spiritual tradition was re-imagined bringing purpose and meaning in new circumstances. Several Principals referred to their desire to be explicit in identifying the Josephite spiritual tradition as central to their leadership. Two Principals with a depth of experience of the Josephite spiritual tradition demonstrated elements of transcendental leadership when citing examples of leading with integrity, humility and joy. This experience resonates with the literature whereby humility is considered as one of the most desirable characteristics of the spiritual dimension of leadership (Brackley, 2004; CCE, 2014; Punnachet, 2009). Furthermore, transcendental leadership were evident when Principals claimed that reflecting on their actions in the context of faith and the Josephite tradition was a source of inspiration and empowerment. These research results are consistent with the literature which identified that the spiritual dimension of leadership, developed through prayer, meditation and contemplation, positively impacted on leadership behaviour (Gowdie, 2017; Rossiter, 2010; Tisdell & Tolliver, 2003).

The power of transcendental leadership was evident when Principals reflected on how formative experiences in the Josephite spiritual tradition had impacted on their leadership. Transcendental leadership was further evidenced when Principals identified that the Josephite spiritual tradition and its focus on service strengthened their leadership when forming a professional community with Principals in like schools. The experience of the strength of a collegial community is confirmed in literature where authors such as Punnachet (2009), Sanders et al, (2003) and Page and Wong (2000) observed that witnessing to a religious commitment strengthened the Catholic identity of schools. Moreover, most Principals recognised that the timelessness of the Josephite spiritual tradition was a source of inspiration in serving the community. All these examples are reflected in the literature whereby transcendental leadership, developed through a reflective paradigm, has at its core a sense of service and the notion of spirituality (Lavery, 2012; Rebore & Walmsley; 2009; Sanders et al., 2003).
5.6.2 Characteristics of the Josephite approach to education evident in leadership practices by leadership teams.

Leadership team participants reported a variety of ways in which the characteristics of the Josephite tradition were evident in their leadership practices. The results are discussed under four themes: coherency of mission with tradition and practice; excellence, rigour and wellbeing; serving families and forming community; and the relevance of Josephite principles. What follows is a discussion of the results considering the elements of transactional, transformational and transcendental leadership evident in the leadership practices of participants.

5.6.2.1 Leadership teams and coherency of mission with tradition and practice.

Leadership team participants demonstrated transactional and transformational leadership when the core values in the Josephite spiritual tradition underpinned their leadership practice. Participants in a leadership role for the first time recognised that the clarity of procedures supported their leadership in difficult circumstances. It appeared that participants demonstrated both transactional and transformational leadership commensurate with their role and responsibility. For example, participants responsible for student learning and wellbeing demonstrated transactional leadership when integrating Josephite core values in structures and procedures. The experiences of participants are consistent with the literature research which reported that transactional leadership was necessary for leaders in the beginning stages of their leadership journey (Glasson, 2010). Furthermore, the transactional leader ensures procedures are clear and fair, and that they consider the needs of others (Tay & Lim, 2012; Tully, 1999, cited in Lavery, 2011). Several participants emphasised the importance of routines and structures in creating an ordered and calm environment to mitigate the impact of marginalisation. On this point, Marzano, Waters, and McNulty (2005) noted that organisational expertise in transactional leadership was necessary for any school.

Transformational leadership was demonstrated by leadership team participants who were responsible for the formation of staff in the areas of Catholic identity, mission and curriculum. Such examples were reflected in the literature where Berkovich (2016) and Shield (2010) noted that transformational leadership was concerned with end values, such as freedom, justice and equality. Both transactional and transformational leadership was evident when participants cited examples of
flexibility in implementing curriculum initiatives and policies that required a high level of organisational skill. Furthermore, transformational leadership was evident when participants emphasised an educative stance in developing relationships with colleagues, students and families, particularly when mediating conflict. Such experiences are reflected in the plethora of literature on transformational leadership, particularly in acknowledging that the primary behaviour of transformational leaders is derived from the strength of relationships (Covey, 2004; Stone et al., 2004). Moreover, all these experiences align with the observations of Cardona (2000), Sultmann and McLaughlin (2000), who emphasised that the inter-relationship between transactional and transformational leadership enriched leadership practice.

5.6.2.2 Leadership teams and excellence, rigour.

Leadership team participants demonstrated both transactional and transformational leadership in creating a learning environment focused on excellence, rigour and the wellbeing of students. Several participants, newly appointed in their role, demonstrated examples of transactional leadership when implementing structures and procedures to support students’ wellbeing and learning. This experience was highlighted in the literature which emphasised transactional leadership was required for the management of people and tasks (Daresh, 2006; Glasson, 2010; Gronn, 2009; Van Oord, 2013). Participants familiar with their role in the school demonstrated elements of transformational leadership when responding creatively and purposefully to student circumstances as a means of mitigating marginalisation. Several leadership teams demonstrated effective team work when aspiring to deliver cutting-edge pedagogy and differentiated learning. These examples epitomised a desire for excellence. These examples are consistent with the literature which emphasised transformational leadership enabled an environment whereby relationships and trust create a shared vision in making a difference (Bass, 1985, cited in Stone et al, 2004; Caldwell et al, 2012; Cardona, 2000). Leadership team participants in rural communities demonstrated transformational leadership when integrating student learning into community celebrations and events in the school and local community. The responses from participants were reiterated in the literature which confirmed that a commitment from leadership to focus on vision and values, symbols, rituals and pedagogy was a way of transforming people and situations (Bergman, 2011).
5.6.2.3 Leadership teams serving families and forming community.

Leadership team participants illustrated features of servant leadership closely tied to the notion of spirituality in serving families and forming an inclusive community in their respective schools. For example, leadership team participants found creative ways to form partnerships with families who had migrant or refugee experience. Furthermore, participants serving in multi-faith and multi-cultural schools adapted their leadership practice to meet language and cultural differences. These results are reinforced in the plethora of literature on servant leadership which identified the first responsibility of servant leaders was the unconditional care for the other (McKenna, 1989, cited in Stone et al., 2004; Schafer, 2005, cited in Black, 2010; Stone et al., 2004). Furthermore, several leadership team participants demonstrated servant leadership when responding to the increasing diversity and fragmentation of families. Participants cited examples of relying on the strength of their spirituality and faith in being flexible, compassionate and humble in responding to individuals and families.

Servant leadership was evident when participants emphasised the need to listen deeply to the concerns of families and to create opportunities for dialogue, particularly in difficult situations. These examples strongly resonate with the literature which identified servant leaders draw on the Christian scripture to create a vision for inclusive communities, questioning their thought patterns and belief systems to serve others (Barney et al., 2015; Nsiah & Walker, 2013). Leadership team participants demonstrated elements of transcendental leadership when their reflective practice enabled them to generously respond in serving the needs of students, families and the community.

5.6.2.4 Leadership teams and the relevance of Josephite principles in leadership practice.

Several leadership team participants demonstrated their capacity for transformational and transcendental leadership when re-imagining the Josephite spiritual tradition and principles in their school community. Leadership team participants demonstrated transformational leadership in sharing their vision of how the Josephite spiritual tradition and its core set of values informed and inspired their leadership. Furthermore, transformational leadership was evident when leadership team participants drew on the founding story of Mary MacKillop and her vision for
inclusive education. These leadership team participants considered Mary MacKillop’s progressive philosophy inspired them to question and challenge the status quo. Such examples of inspired leadership were reflected in the literature which identified that a shared vision encapsulated the desires, beliefs, talents and ideas of members of the community to influence the change process (Caldwell et al., 2012; Cardona, 2000; Friedman, 2004).

Leadership team participants inspired by the Josephite spiritual tradition demonstrated leadership qualities synonymous with servant leadership. While the participants emphasised servant leadership was interwoven with pedagogy and learning, there appeared to be a paucity of literature on servant leadership and pedagogy. However, Black (2010) noted servant leadership provided an appropriate combination of faith and curriculum leadership in providing wholistic education. Several leadership team participants demonstrated features of transcendental leadership when they emphasised their vision and desire for relational and inclusive leadership, infused with humility and simplicity, as being critical in a Josephite approach to education. This experience was reiterated in the literature when emphasising the spiritual dimension integrated with servant leadership enabled leadership to see things in new ways (Barney, et al., 2015; Camilleri, 2017).

5.6.3 Characteristics of the Josephite approach to education evident in leadership practices of Principals and leadership teams.

This subsection is a discussion of the similarities and differences in the ways in which characteristics about a Josephite approach to education are evident in leadership practices of Principals and their leadership teams. The results from Principals and leadership team participants are discussed under four themes: coherency of mission with tradition and practice; educational rigour and excellence; service to families; and the relevance of core values and principles in the Josephite tradition. These themes are considered in the light of three models of leadership, namely; transactional, transformational and transcendental leadership.

5.6.3.1 Principals and leadership teams value coherency of mission with tradition and practice.

Most Principals recognised they were responsible for the alignment of mission with tradition and practice in leading their school community. The results
implied that transcendental leadership was present when Principals inspired by faith had embodied the Josephite spiritual tradition. Principals were able to explicitly communicate the Josephite spiritual tradition and its values and principles to their leadership team. Several Principals demonstrated transcendental leadership when their reflective practice gave rise to creative ways in which to re-imagine the Josephite tradition and its vision in the present circumstances. In such instances, leadership team participants were able to align the implementation of structures and procedures with the mission and vision of the school community. Furthermore, Principals demonstrated transformational leadership when they motivated, inspired, guided and mentored members of their leadership team. Similarly, the impact of transformational leadership was evident when leadership team participants cited examples of being encouraged to participate in professional learning and mentoring opportunities.

5.6.3.2 Principals, leadership teams and excellence and rigour.

Principals and leadership team participants demonstrated transformational leadership when striving for excellence and rigour in teaching and learning in their school community. Transformational leadership was apparent when Principals referred to the high priority they placed on staff formation and the professional development of their staff. In similar manner, leadership team participants who had diligently engaged in reflective practice and professional learning opportunities were empowered to integrate gospel values and Josephite characteristics when introducing new programs in the school. Most Principals demonstrated transformational leadership when they encouraged their leaders and staff members to develop inclusive practices so that each child / young person was able to participate in their learning. In turn, it appeared that leadership team participants demonstrated features of both transformational and transactional leadership when defined structures and processes facilitated the integration of wellbeing and learning for each student. In some situations, Principals drew on the spiritual dimension of leadership to inspire a rigorous learning environment where sensitivity and compassion enabled students to achieve to the best of their ability. Similarly, all leadership team participants demonstrated a blend of transactional and transformational leadership in creating a relational learning environment.
5.6.3.3 Principals, leadership teams and service to families.

The results from Principals and leadership team participants implied servant leadership was dominant in the leadership practices of Principals and participants who were conversant with the diverse needs presented by families. Several Principals were explicit in drawing on gospel images of servant leadership for inspiration and motivation when responding to the impact of marginalisation on families. Similarly, servant leadership practices were evident when leadership team participants constantly interacted with families in adapting the social and learning environment to meet the needs of the student. Features of servant leadership were tangible when leadership team participants across the six schools identified the need for humility and compassion when developing an understanding of the socio-cultural circumstances experienced by families. Servant leadership was visible when Principals and participants created school environments that nurtured dignity, acceptance and hospitality in meeting the diverse range of needs in the school community. Principals and leadership team participants demonstrated transcendental leadership when they emphasised their service to families was integral to the expression of the Josephite spiritual tradition in their school community.

5.6.3.4 Principals, leadership teams and the relevance of the tradition in leadership practice.

Principals and leadership team participants with a depth of experience in the Josephite tradition were empowered when re-imagining the Josephite tradition in their school community. Transcendental leadership was apparent when Principals sought to integrate the Josephite spiritual tradition, core values and principles in meeting new challenges. For example, when Principals drew on their faith and spirituality they inspired their leadership team to be explicit in identifying Josephite core values in their interactions with students and families. Furthermore, some leadership team participants drew on the Josephite spiritual tradition and its focus on service in responding to the complexity of twenty first century education. Transcendental leadership was obvious when Principals reclaimed the Josephite spiritual tradition, and its core values of dignity and charity, to give meaning and purpose in the context of a fragile Catholic Church. Similarly, some leadership team participants urged a re-claiming of the spiritual tradition, its core values and principles, to affirm their leadership at the ‘cutting edge of the Church’. It appears a
combination of transcendental and transformational leadership inspired Principals to advocate for the provision of inclusive Catholic education when issues of funding and resourcing arose by providing data and highlighting the outcomes achieved. In like manner, transformational leadership was tangible when leadership team participants were inspired to critique educational initiatives they perceived were driven by economic rationalisation and the commodification of education.

5.6.4 Characteristics about a Josephite approach to education evident in the leadership practices of each Principal and his / her leadership team.

This subsection considers the ways in which the characteristics of a Josephite approach to education are evident in the leadership practices of each Principal and his / her leadership team in the respective school community in which they serve. The results from each Principal and his / her leadership team are discussed under four themes: coherency of mission with tradition and practice; excellence and rigour; serving families and forming inclusive community; and the relevance of Josephite principles. The responses are further discussed considering transactional, transformational and transcendental leadership. In each of the six schools the Principal and her / his leadership team revealed examples of transcendental, transformational and transactional leadership.

The results from the Principal and her leadership team in School One revealed that a combination of the three models of transcendental, transformational and transactional leadership enabled the creation of a shared vision in serving the school community. Transcendental leadership was apparent when the Principal reflected on her journey into Catholicity and the impact of that personally and as a leader. Some leadership team participants demonstrated elements of transformational and transcendental leadership in recognising that the spiritual tradition provided ‘the glue’ in their practical response to students, families and staff members. Transformational leadership was evident in the Principal’s desire for the professional growth of her staff to meet the demands of twenty first century teaching and learning. Both transformational and transactional leadership was evident in the Principal’s focus on building leadership capacity within her staff in addition to making structural changes in the distribution of responsibility. The impact of such a focus was palpable when some participants sought a balance between their
perception of the tradition, its core values and the implementation of new structures, processes and procedures. Transcendental leadership were evident when the Principal and her leadership team drew on their faith and the Josephite spiritual tradition in their service to the school community during times of change and adversity.

The responses from the Principal and her leadership team in School Two demonstrated how transcendental leadership shaped an inclusive learning community in the midst of difficult economic circumstances. This Principal’s transcendental leadership was tangible in re-imagining the Josephite tradition as it permeated all areas of the school community. Both transactional and transformational leadership were implied when participants implemented procedures to affirm the dignity of each child and family. Both the Principal and leadership team participants demonstrated the strength of transformational leadership in their mutual commitment to creating an inclusive learning environment. The combination of transformational and transcendental leadership was obvious when both the Principal and her leadership team were focused on attending to and honouring each child’s wellbeing and learning. This Principal appeared to have integrated elements of transactional, transformational and transcendental leadership in her commitment and educative approach to staff formation and development. In turn, the impact of the three models of leadership were revealed in the positive engagement of leadership team participants in professional learning and mentoring.

The results from the Principal and her leadership team in School Three indicated that transcendental leadership was possible when the Josephite spiritual tradition was embedded in creating an inclusive school and parish community. Most Leadership team participants demonstrated elements of transcendental leadership when naming the Josephite spiritual tradition and its focus on service as inspiring their approach to students, families and colleagues. Whereas, the Principal revealed ambivalence towards some of the symbols and cultural practices she had observed in the school community. This Principal appeared to have a transactional approach to leadership when relating to staff, students and families. In contrast, leadership team participants demonstrated transformational leadership when re-interpreting the Josephite spiritual tradition to meet the new challenges of a pluralistic community. The variation in results between the Principal and leadership team participants could be explained by the recent appointments of the Principal and Deputy Principal both
of whom had no prior experience in a Josephite school. On the other hand, the elements of transcendental and high-level transformational leadership exhibited by participants could be due to their length of service and experience of the Josephite tradition embedded in the school over generations.

The Principal and leadership team in School Four demonstrated the effective influence of transcendental leadership in creating a shared vision and team work in serving the school and town community. For example, this Principal highlighted an integrated approach to education where faith and relational learning inspired excellence and rigour. In like manner, leadership team participants were inspired by their Principal’s integration of the Josephite spiritual tradition and core values in the ordinary practical routines of the school community. These leadership team participants demonstrated transactional and transformational leadership when emphasising that attention to the ordinary and smallest detail was a means of serving the dignity of families. Transcendental leadership was evident when the Principal was explicit in re-framing rituals, symbols and core values when creating an inclusive community. Furthermore, this Principal inspired trust, solidarity and a quiet confidence in building the capacity of her leadership team. In turn, leadership team participants demonstrated transactional and transformational leadership when confidently implementing structures and processes in their school community. The capacity of this Principal to effectively integrate elements of the three models of leadership could be explained by her personal and professional embodiment of the tradition. Furthermore, the size of the school necessitated the Principal employ and model aspects of transactional, transformational and transcendental leadership in the local rural community.

The Principal and his leadership team in School Five reflected a strong emphasis on servant leadership and hence demonstrated transcendental leadership in responding to those in marginalised circumstances. Servant leadership was palpable when this Principal valued humility and integrity in nurturing an inclusive community marked by increasing cultural and faith diversity. Both the Principal and leadership team participants demonstrated transformational leadership when responding compassionately to students with diverse learning and wellbeing needs. The transforming influence of servant leadership was obvious when participants responded to difficult situations with creativity and compassion. The tangible acts of service by this Principal and leadership team could be explained by the size and
location of the school which is situated in a neighbourhood characterised by social and economic marginalisation.

The results from the Principal and her leadership team in School Six reflected the power of transcendental leadership in their commitment to formative experiences in the Josephite spiritual tradition to serve their community. The Principal and her leadership team referred to the visible signs of the transcendent in the physical environment as supportive of integrating the spiritual dimension throughout the school. The influence of transformational leadership was tangible when this Principal valued the formative experiences in the tradition as assisting her in developing a coherent approach to Josephite education. Furthermore, leadership team participants reflected on formation experiences within their own school and across a network of Josephite schools as strengthening their leadership in the Josephite tradition. Transactional and transformational leadership was evident in the Principal’s vision for a learning environment underscored by compassion. Similarly, the combination of transactional and transformational leadership encouraged participants to welcome and invite students into a structured learning and faith community that sought to both affirm and challenge expectations. The integration of transcendental, transformational and transcendent leadership practices were observed when participants relied on team work in responding to student wellbeing, learning and faith formation in a large and diverse school community.

5.7 Summary

This section discussed ways the characteristics about a Josephite approach to education are evident in leadership practices. Specifically, the results were discussed considering three models of leadership; namely transcendental, transformational and transactional. Transcendental leadership was mostly evident when Principals and leadership team participants embodied the Josephite spiritual tradition and internalised its values and principles thereby creating a sense of inter-connectedness within the community. Principals and participants who demonstrated a personal and professional commitment to prayer and reflective practice were more likely to provide examples of transcendental leadership in their capacity to inspire meaning and purpose in others.

Transformational leadership was mostly evident when Principals effectively communicated a shared vision for an excellent and rigorous learning community and
underpinned this vision with compassion. In turn, several leadership team participants were able to demonstrate their transformational leadership in implementing curriculum initiatives and programs infused with core values and the principles encompassed in the Josephite spiritual tradition. Transactional leadership was mainly seen to be the prerogative of leadership team participants who were responsible for the daily organisation, so structure and organisation supported learning and wellbeing initiatives. It appeared several Principals were influential in scaffolding procedures and structures to support their leadership teams in implementing policies.

A Josephite approach to education appears to combine the three models of transactional, transformational and transcendental leadership to develop a leadership framework of service, spirituality, vision and teamwork. The data strongly indicated that Principals and their leadership teams pre-dominantly demonstrated transformational and transcendental leadership, particularly in the integration of faith, relationships, and shared vision in forming inclusive learning communities. Moreover, it was evident that Principals and leadership team participants drew on their spirituality so that creative and courageous leadership was evident in serving the school community. While all Principals demonstrated elements of the three models, Principals in smaller schools had a more ‘hands on’ approach to leadership and by necessity integrated all three models in service of their school community. Principals in larger schools were able to nurture the three models within their teams as participants had specific roles and responsibilities requiring elements of the models commensurate with their designated role. Table 5.4 provides a summary of the ways in which the characteristics of the Josephite approach to education are evident in the leadership practices of Principals and their leadership teams.

Table 5.5

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Experiences</th>
<th>Review of literature</th>
</tr>
</thead>
<tbody>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Serving families and forming community</td>
<td>Transcendental leadership is evident when Principals who are self-aware serve the greater good of the community.</td>
<td>Cardona (2000) Nsiah &amp; Walker (2013)</td>
</tr>
<tr>
<td></td>
<td>Transactional and transformational leadership provides clearly defined structures and processes as a means of serving other and mitigating the impact of marginalisation.</td>
<td>Marzano, Walters &amp; McNulty (2005)</td>
</tr>
<tr>
<td>Relevance of Josephite spiritual tradition</td>
<td>Transcendental leadership occurs when Principals and participants inspired by faith and committed to formative experiences have the capacity to make-meaning of the Josephite spiritual tradition in new circumstances.</td>
<td>Gowdie (2017) Rebore &amp; Walmsley (2009)</td>
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</table>
5.8 Overall Summary

This chapter is a discussion of the research study exploring the concept of a Josephite approach to education and the ways in which it is implemented in schools conducted in the Josephite tradition. The discussion of results was divided into three sections based on the three research questions. The sections were: characteristics of the Josephite tradition; characteristics of the Josephite tradition underlying leadership; characteristics of the Josephite tradition evident in leadership practice.

The first section outlined the characteristics of the Josephite tradition identified by Principals and their respective leadership teams. The results of Principals and leadership team participants were presented under four headings: the founding story; Josephite core values; service to the community; and the unifying power of symbols. All Principals and leadership team participants identified that the founding story was a source of inspiration when drawing upon its core values and principles. Results indicated that Principals and leadership team participants were empowered in their roles when the Josephite spiritual tradition was re-imagined using symbols, rituals and storytelling. The inspiration of the founding story enabled a unifying vision in serving the diverse needs present in school communities.

The second section considered the characteristics of the Josephite tradition underlying a Josephite approach to leadership as identified by Principals and their respective leadership teams. The results were presented under four themes: faith inspired leadership; integrity in leading for mission; leadership and service; and leadership and formation. Results indicated that those Principals who were inspired by faith and had embodied the Josephite spiritual tradition enabled coherency of mission with tradition and the Catholic identity of the school community. In turn, results suggested that when Principals and leadership team served with humility and compassion they reduced the impact of marginalisation for students and their
families. Results indicated that Principals who integrated the Josephite spiritual
tradition in their personal and professional stance demonstrated a non-hierarchical
style of leadership and were attentive in providing formative experiences for their
leadership teams and staff members.

Finally, the third section emphasised the characteristics of the Josephite
tradition evident in the leadership practice of Principals and their respective
leadership teams. Discussion in this section was presented under four themes:
coherency of mission with tradition and practice; excellent and rigour; serving
families and forming an inclusive community; and the relevance of Josephite
spiritual tradition in leadership practice. Those Principals who demonstrated
transcendental leadership inspired the alignment of mission with tradition and
practice. In addition, Principals and leadership team participants who exhibited a
blend of transactional and transformational leadership nurtured an inclusive learning
community marked by creativity, excellence, rigour and compassion. Results
indicated that Principals who embodied the Josephite spiritual tradition instilled a
greater sense of purpose and meaning for leadership team participants in meeting
the challenges of 21st Century education. It appeared that a combination of
transactional, transformational and transcendental leadership best served a Josephite
approach to education.

5.9 Conclusion

Chapter Five provided an interpretive discussion of the results outlined in
Chapter Four. The results for each of the three research questions were analysed
along with the relevant discussion of literature. This chapter provides the basis for
the final chapter: Review and Conclusions.
Chapter 6
Review and Conclusions

6.1 Purpose of the Research

The purpose of this research was to explore the characteristics of a Josephite approach to education that are identified and implemented by Principals and their leadership teams in schools conducted in the Josephite tradition. This research sought to understand the approach by which leadership is exercised by Principals and their leadership teams in line with the underlying characteristics inherent in Josephite education. In particular, the research investigated what ways the characteristics of Josephite education are implemented by Principals and their leadership teams when serving inclusive learning communities in five schools in rural and metropolitan South Australia and one school in Victoria.

6.2 Design of the Research

The theoretical framework underpinning this research drew from a constructivist qualitative approach utilising interpretivism as its theoretical perspective. The interpretivist lens which this research used was that of symbolic interactionism. Symbolic interactionism was chosen because it highlights a process of interaction between individuals and groups whereby the perceptions, attitudes and values of a community enable the researcher to interpret how meanings are constructed (Crotty, 1998). The methodology employed in this research was that of an instrumental case study which sought to gather descriptive data from Principals and their respective leadership teams to explore how they understood a Josephite approach to education. The data were gathered through in-depth semi-structured interviews, document search, field notes and a reflective journal. The data analysis complied with the guidelines provided by Miles, Hubermann and Saldana (2014). The three components of the analytical framework used in this study consisted of data reduction, data display and conclusions drawn and verified (Miles, Hubermann & Saldana, 2014). Three specific research questions underpin this inquiry:

1. What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics of the Josephite tradition in their respective school community?
2. What do Principals and their leadership teams, in schools conducted in the Josephite tradition, identify as the characteristics underlying a Josephite approach to leadership in the context of the school community in which they serve?

3. In what ways are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their respective leadership teams?

The three specific research questions were discussed in relation to the data in Chapter Five. The discussion of the data in Chapter Five was reinforced by a critical reflection of relevant literature. Responses to the specific research questions proposed by this inquiry now follow.

6.3 Research Questions Answered

6.3.1 What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics of the Josephite tradition in their respective school community?

The findings of the research suggest four themes that Principals and their respective leadership teams identified as characteristics of the Josephite tradition in their school communities. These themes were: the founding story; service and forming community; symbols and language; and a core set of values. These themes will now be briefly summarised.

Principals and their respective leadership teams strongly identified the Josephite tradition, derived from the founding story, as shaping the ethos and culture of their school community. Both Principals and leadership team participants drew on the founding story as a source of inspiration to guide and direct their actions. Principals considered the founding story influenced their leadership behaviours in carrying out mission in the challenging landscape of the Catholic Church. Some Principals and leadership team participants acknowledged that time and experience was required for the founding story and its tradition to be ‘heart-felt’. Principals and leadership team participants emphasised that developing effective partnerships with families was central in serving and forming an inclusive faith and learning community. A close partnership with families, the parish, and diocesan and town community was strongest in rural school communities, while some primary metropolitan schools had strong networks within the local parish community. All
Principals and leadership team participants emphasised that belonging was key in creating inclusive communities and thereby reducing the impact of marginalisation. Principals recognised their personal integrity inspired staff to focus on relationships when developing processes and structures that were inclusive of all.

Principals and leadership team participants identified the unifying power of symbols, language and rituals in the Josephite tradition. This power was experienced when storytelling and rituals were re-imagined and re-interpreted to meet contemporary circumstances. Symbols and rituals were considered by Principals and leadership team participants to strengthen their individual school community and the network of Josephite schools. Principals and leadership team participants identified a core set of values such as charity, dignity and justice sustained the community in difficult times. All Principals and leadership teams emphasised that charity was palpable in the practical compassionate responses to students and their families. Moreover, justice was perceived as a value that permeated relationships, structures and processes in the school community.

6.3.2 What do Principals and their leadership teams in schools conducted in the Josephite tradition identify as the characteristics underlying a Josephite approach to leadership in the context of the school community in which they serve?

Principals and leadership teams highlighted four characteristics of the Josephite tradition which underlie leadership in their school communities: faith inspired leadership; integrity in leadership for mission; leadership as service; and openness to leadership formation. These characteristics will now be summarised.

Principals highlighted that faith and prayer inspired and strengthened their leadership so that a prayerful stance informed their vision and commitment. Furthermore, Principals noted the inspiration from prayer and reflection deepened their capacity to respond to the joys and sorrow of the school community. Most leadership team participant identified compassion and humility in responding to challenging situations. Principals identified recognised that personal and professional integrity was critical in aligning mission with the Josephite tradition. Most Principals and leadership team participants identified that coherency between their faith experience and the Josephite spiritual tradition strengthened their leadership. Some leadership team participants expressed their desire to become
more confident and explicit in communicating their faith and the school’s purpose in their leadership.

Principals and leadership team participants strongly emphasised that service of students and their families characterised a Josephite approach to leadership. Most Principals referred to their leadership as a vocational response to the gospel imperative of building relationships of dignity, love, justice, forgiveness and trust in their service of others. A non-hierarchical leadership style, marked by humility, was considered by some Principals to nurture and celebrate the gifts of others. In turn, leadership team participants appreciated that humility and compassion empowered and inspired leadership. Principals and leadership team participants expressed an openness to ongoing leadership in the Josephite spiritual tradition as a means of enriching their leadership. Principals indicated a desire for a strong connection between authentic Catholicity and their own selves as the leader, particularly in leading the faith community. Leadership team participants acknowledged that formation in the Josephite spiritual tradition encouraged them in courageous risk-taking in responding with care to individuals.

6.3.3 In what ways are the characteristics about a Josephite approach to education evident in the leadership practices of Principals and their respective leadership team?

An examination of the data revealed four ways in which the characteristics about a Josephite approach to education are evident in the leadership practices of Principals and their leadership teams: an alignment of mission and its coherent expression in tradition and practice; educational rigour imbued with compassion; service and forming an inclusive community; and, an application of the characteristics of the Josephite tradition in practice. A brief summary of these themes is outlined.

Principals identified the challenge of aligning mission with tradition and practice. Some Principals were aware of the need to ensure that ‘mission-thinking’ co-existed with strategic planning so the ‘what’ and the ‘why’ of decision making and strategy were evident to staff and the school community. Similarly, leadership team participants gained clarity of vision and purpose when their Principal explicitly modelled ways of carrying out mission. Several Principals and leadership team participants appreciated that reflecting on their practice positively impacted on their
leadership behaviours in the implementation of a Josephite approach to education. Principals and leadership team participants emphasised that wholistic learning imbued with compassion enabled students’ dignity to flourish. In particular, Principals and leadership team participants emphasised the practice of ensuring teaching and learning was student-centred, integrated, wholistic and marked by flexibility. Furthermore, several Principals and leadership team participants recognised that a shared vision for an inclusive learning environment enabled innovation, creativity and the questioning of assumptions to re-frame curriculum and wellbeing practices.

Principals and leadership team participants acknowledged that the basis of their leadership was serving and forming an inclusive faith and learning community. Principals who demonstrated an awareness of culture and the impact of trauma on students and their families, were more likely to select, form and support staff members in serving families. In turn, leadership team participants were able to reflect on the effectiveness of their leadership practices in reducing the impact of marginalisation. Finally, the Josephite tradition was relevant and evident in practice when Principals coherently aligned mission with tradition and vision, integrating spirituality and service in their leadership practice. Leadership team participants acknowledged their school community was strengthened by the grounding of Josephite core values such as charity, dignity and justice in their daily leadership practice.

When Principals and their respective leadership teams were explicit in the integration of the Josephite spiritual tradition in serving the community, common purpose and collegiality within and between schools in the Josephite tradition was evident. The research indicated that a Josephite approach to education is well served by Principals and leadership teams demonstrating transactional, and most particularly, transformational and transcendental leadership in the implementation of a Josephite approach to education. Principals who are attentive to the experience of the transcendent inspired teamwork in the effective combination of the three models of leadership so that creativity and courage are evident in the creation of inclusive faith and learning communities.

6.4 **Sisters of St Joseph**

The Sisters of St Joseph focus group provided a reference upon which the
data collected from Principals and leadership team participants could be affirmed, clarified or critiqued by the Sisters’ understanding of a Josephite approach to education. The Sisters’ focus group acknowledged that the strong identity of schools conducted in the Josephite tradition in South Australia was due to the explicit and practical strategies undertaken in the transition from the Sisters of St Joseph as Principals to lay leadership of diocesan schools. The Sisters advocated, moreover that Congregationally governed schools were a means of providing the Sisters, Board Directors, Principal and schools with a coherent way to proclaim the gospel. The Sisters reinforced the vital role of formation of Principals and school staff in recontextualising the gospel through the lens of the Josephite spiritual tradition in this liminal time so that the best of the compassionate Church is experienced by families. Furthermore, the Sisters’ recognised that re-imagining and re-interpreting the Josephite spiritual tradition strengthened Principals’ and key leaders’ capacity to become “architects and creators of culture” in leading and forming inclusive Catholic school communities in challenging times (Cook, 2001, cited in Gowdie, 2017, p. 141). The Sisters emphasised that ongoing dialogue with Bishops and Governing authorities in Catholic Education was needed to ensure the educational authority of the Josephite spiritual tradition is nurtured and evident in schools conducted in the Josephite tradition.

6.5 Benefits and Limitations of the Research Design

There are two benefits of the research design. Firstly, the constructivist perspective acknowledged the place of the researcher. In this situation, the researcher is a Sister of St Joseph, educator and former Principal of schools conducted in the Josephite tradition. Hence, the researcher’s background, qualifications and experience provided an ‘insider’s’ insight into the exploration of a Josephite approach to education to enhance the credibility of the study. Secondly, the chosen research design enabled the researcher to ‘give voice’ and to value the experience of participants in this study: the six Principals, their respective leadership teams and the Sisters of St Joseph focus group.

Two possible limitations were already discussed in Chapter One and they were firstly, a sample size of six schools, five schools from a total of twenty-eight schools conducted in the Josephite tradition in South Australia and one Congregational school in Victoria. However, the six schools were purposefully
chosen because they are a broad representation of more than four hundred schools across Australia that claim the Josephite founding story as their spiritual tradition. The second limitation was the possible potential for bias due to the researcher being a Josephite sister and a former Principal of two schools conducted in the Josephite tradition. This possible bias was counteracted by employing criteria to assure trustworthiness as explained in section 3.8. The use of both member checking to corroborate the accuracy of the data and triangulation of combined processes in the collection of data aided the trustworthiness of the research. Additionally, the use of a reflective journal assisted the researcher to observe her own responses throughout the research.

6.6  Knowledge Added to the Field of Study

This thesis added knowledge to the field of study in four ways. Firstly, the study affirmed the strength, breadth and depth of the Josephite tradition identified by Principals and leadership team participants. The study highlighted the similarities Principals and leadership team participants identified as the characteristics of the Josephite tradition no matter the size, composition or context of the school community. The study affirmed that when the Josephite spiritual tradition was re-contextualised and re-imagined from the founding story to meet the current context, schools claimed a strong gospel identity. The alignment of mission with educational practice in the Josephite tradition strengthened collegiality in providing Principals and leaders with a unified purpose and language in the implementation of a Josephite approach to education. Moreover, an alignment of mission and practice enabled the capacity for Principals and leadership team participants to respond effectively to the current challenges experienced in realising God’s mission through the ministry of Catholic education.

Secondly, the study outlined how Principals and leadership teams in the Josephite tradition draw on theology, spirituality and formation experiences to align mission and practice. This study showed that when Principals and leadership teams explicitly integrate Catholic social justice principles in their leadership practice, human dignity can flourish, and inclusion can be celebrated in school communities. Principals and their respective leadership teams who were committed to formation in the Josephite tradition, demonstrated a new religious consciousness and transformation (Duignan, 2007; Neidhardt, 2014). In turn, this new consciousness
gave rise to innovation and courageous risk-taking in implementing a Josephite approach to education in meeting the demands and challenges of government accountability and the current milieu of the Catholic Church.

Thirdly, the study identified that a combination of transactional, transformational and transcendental leadership best serves an approach to education infused with the Josephite spiritual tradition. The study found that a Josephite approach to education requires a team approach whereby a strong organisational culture, coupled with visionary leadership, inspires and motivates people in a common purpose. Furthermore, when Principals are spirit filled, prayerfully aware and service orientated they can creatively and courageously lead inclusive faith and learning communities in a liminal time in Church and society. The study indicates that Principals exercising transcendental leadership embody the Josephite spiritual tradition in service of school communities and lead from the totality of who they are as human beings (Rebore & Walmsley, 2009).

Finally, this thesis is the only known study on the current topic of educational leadership in the Josephite tradition, where the researcher was a Josephite Sister with experience as a Principal. The researcher’s seventeen years’ experience as Principal in schools in the Josephite tradition added an ‘insider’ perspective to the study. As a result of this opportunity, the researcher could compare, affirm and empathise with the research participants while comparing and aligning the ‘voices’ of Principals and their respective leadership team with the ‘voices’ of the Sisters’ focus group.

6.7 Conclusion

This study was concerned with an exploration of what Principals and the respective leadership teams understood by the concept of a Josephite approach to education. Moreover, the study explored the ways Principals and their leadership teams implement a Josephite approach to education in the context of the school community in which they serve. The catalyst underpinning the motivation for this study was threefold. These were, firstly, the conclusion of the Sisters of St Joseph as Principals of schools in Australia; secondly, the Canonisation of St Mary of the Cross (MacKillop) and the sesquicentenary of the Josephite education; and finally, the emerging interest in the Catholic identity of schools in a liminal time. This research sought to understand the approach by which leadership is exercised by Principals and their leadership teams in line with the underlying characteristics
inherent in Josephite education. In particular, this research investigated the ways in which characteristics of Josephite education are implemented by Principals and their leadership teams. In such manner, this study endeavoured to ‘give voice’ to the Principals and their leadership teams in the implementation of a Josephite approach to education in creating inclusive faith and learning communities in a liminal time in Church and society.

6.8 Implications of the Study for the Profession

Educational leadership in the Josephite tradition pertains to both the Congregation of the Sisters of St Joseph and Diocesan governing authorities of schools conducted in the Josephite tradition. The results of the study have implications for the following groups or individuals:

1. The Congregation of the Sisters of Saint Joseph
2. Governing entities of Catholic Education namely; National Catholic Education Commission (NCEC); South Australian Commission for Catholic Schools (SACCS); and Catholic Education South Australia (CESA)
3. Present and future Principals and leadership team participants in schools in the Josephite tradition.
4. Other researchers with an interest specifically in the Josephite tradition or for those interested in nurturing the founding spiritual tradition and charism of their school community.

The study has implications for the Congregation of the Sisters of St Joseph as it highlights a clear and demonstratable desire by Principals and leadership teams to continue the legacy of Josephite education into the twenty first century. Therefore, the Sisters of St Joseph have a role to provide quality formation of Principals and key leaders in the integrity of a Josephite approach to education. Specifically, the Sisters are directly responsible for the formation of Board Directors, key leaders and staff in Congregationally sponsored schools. The study, therefore, has implications for the Sisters of St Joseph in the commitment of resources towards the formation of Principals, key leaders, school staff and governing entities in a Josephite approach to education. Furthermore, the study informs the Sisters of St Joseph of the potential for formation of staff employed by the Sisters of St Joseph in various other works.

The study is relevant to Governing authorities responsible for Catholic
Education. This study provides the Bishops and their governing entities (NCEC, SACCS) with a body of knowledge of educational leadership in the Josephite tradition. In particular, this study informs governing entities of the characteristics of Josephite approach to education to be considered in the recruitment, selection, appointment, formation and appraisal of Principals and key leaders. The study has implications for Governing entities in fostering collegial partnerships with the Sisters of St Joseph in the formation of credible and skilful leaders in Congregational and diocesan schools in the Josephite tradition.

The research study has implications for current and future Principals and key leaders in schools in the Josephite tradition. This study demonstrates that Principals and key leaders who commit to quality formation experiences and reflective practice strengthen their capacity for transcendental leadership. Moreover, Principals and key leaders who participate in formation experiences with other schools in the Josephite tradition strengthen their educational leadership in a Josephite approach to education. Finally, the study offers current and future Principals and key leaders a framework upon which to align their educational leadership with the characteristics of the Josephite spiritual tradition in a Josephite approach to education.

This study is relevant to other researchers in three ways. Firstly, for researchers interested in the Josephite spiritual tradition and its approach to education, this study provides a foundation for further research. Secondly, this study could be replicated across other religious congregations, or schools with a spiritual tradition, seeking to understand their identity and influence in the ongoing life of the Church and service of Catholic education. Thirdly, this study provides a base for further research for researchers interested in educational leadership in Catholic education and models of formation for mission.

6.9 Recommendations

Five recommendations are drawn from the results of this study. The recommendations are made to the Congregation of the Sisters of St Joseph and the Governing authorities of Catholic education. They are as follows. Firstly, the research indicates that coherency of mission with tradition, vision and leadership practice is required for the integrity of a Josephite approach to education. Therefore, it is recommended that the Congregation of the Sisters of St Joseph converse with the Bishops (NCEC, SACCS, CESA) to ensure that the mandate
that comes from the Josephite spiritual tradition is reflected in diocesan schools in the Josephite tradition. The Josephite spiritual tradition will be evident in the continuity of characteristics that permeate the structures and practices in a Josephite approach to education.

Secondly, the results suggest that explicit formation of Principals and leaders in the Josephite tradition is required to sustain mission in a Josephite approach to education. It is recommended that the Trustees of the Sisters of Saint Joseph appoint and authorise ‘Mission Animator/s’ to represent the Sisters of St Joseph in matters pertaining to a Josephite approach to education. The ‘Mission Animator/s’ would have a specific role in the formation of leaders and their school communities based on a conceptual framework for leadership formation for mission in a Josephite approach to education. Figure 6.1 illustrates a conceptual framework for leadership formation for mission in a Josephite approach to education. The framework highlights the cyclical nature of formation in a whole school approach to staff formation. Furthermore, the framework emphasises the specific formation of the individual and collective transformation of leaders, leading to transcendental leadership necessary in a Josephite approach to education.

Thirdly, the results highlight that the integration of a Principals’ faith and spirituality with the Josephite tradition in leadership enables an explicit and visible witness in the school community and dioceses. Therefore, it is recommended that the Congregation of the Sisters of St Joseph sponsor a biennial Josephite Education Conference for Sisters of St Joseph, Principals and key leaders of schools claiming the Josephite spiritual tradition across Australia and New Zealand. The conference could be a collaboration between the Sisters of St Joseph and the Association of Josephite Affiliated Schools (AJASS) and the network of leaders of diocesan schools in the Josephite tradition. The conference could nurture Principals and key leaders in forming inclusive faith and educative communities in the circumstances of today. Furthermore, this recommendation has the potential to build the collective strength of leaders to ensure the integrity of the Josephite tradition into the future.
Fourthly, the research outlines that the founding story needs to be re-interpreted and re-imagined in new times and contexts. It is recommended that Catholic Education South Australia liaise with the Sisters of St Joseph in contributing to the Enhancing Catholic School Identity (ESCI) project undertaken in schools in the Josephite tradition. The Sisters of St Joseph could influence formative processes to assist Principals and key leaders in critiquing, aligning and implementing the data gained from the ESCI project with the characteristics of a Josephite approach to education.

Finally, the research demonstrates that transcendental leadership occurs when leaders embody the Josephite spiritual tradition, participate in ongoing formation and develop skills in reflective practice. Furthermore, the findings indicated that a combination of transcendental, transformational and transactional leadership is required in the implementation of a Josephite approach to education. Therefore, it is recommended that the Sisters of St Joseph collaborate with Catholic Education South Australia in formulating a memorandum of understanding to support the recruitment, selection, appointment and formation of Principals and key leaders of schools in the Josephite tradition. The memorandum of understanding would
promote sustainability of a Josephite approach to education and the recontextualization of the gospel through the lens of the Josephite spiritual tradition.

6.10 Addendum

The thesis has already had an impact on the profession. Firstly, the presentation of results was provided to the Association of Josephite Affiliated Secondary schools across Australia and New Zealand at their annual 2018 conference as a catalyst for the formation of Principals and the creation of a charter for the Association. Secondly, the results have been used in working with South Australian leaders of schools in the Josephite tradition during the planning and implementation of an annual leader’s formation day. Finally, the results were used to respond to the Port Pirie Diocesan Survey ‘System leadership and Succession Planning Project’ pertaining to the recruitment, selection and formation of Principals in Catholic Education South Australia.

6.11 Personal Impact Statement

This research has had a significant impact on me. The motivation for the study arose from my personal experience coupled with the context of Josephite Education in a liminal time when the Sisters no longer serve as Principals of schools in the Josephite tradition. This research has enabled me as a Sister of St Joseph and educator, to elicit the ‘voices’ of Principals and their respective leadership teams in identifying the characteristics of the Josephite tradition underlying their approach to leadership. Moreover, the research has highlighted the timelessness and integrity of a Josephite approach to education in the circumstances of today. The study has allowed me to engage with Principals and leaders in ongoing formation in the Josephite spiritual tradition as it is explicitly applied in educational practice in varying contexts.
Appendix A: Participant information sheet

PARTICIPANT INFORMATION SHEET

Educational Leadership in the Josephite Tradition

Dear

You are invited to participate in the research project described below.

What is the project about?
The research project explores the characteristics and features of a Josephite approach to education that are identified and implemented by Principals and their leadership teams in schools conducted in the Josephite tradition. The research seeks to understand the approach by which leadership is exercised by Principals and their leadership teams in line with the underlying beliefs and characteristics inherent in Josephite education.

Who is undertaking the project?
This project is being conducted by Catherine Mead rsj, a member of the Congregation of the Sisters of Saint Joseph. The research will form the basis for the degree of Doctor of Education at The University of Notre Dame Australia, under the supervision of Associate Professor Shane Lavery.

What will I be asked to do?
If you consent to take part in this research study, it is important that you understand the purpose of the study and the process you will be asked to participate. Please make sure that you ask any questions you may have, and that all your questions have been answered to your satisfaction before you agree to participate.

The project involves

• Semi-structured one to one interview with six Principals of schools conducted in the Josephite tradition, focus group interviews with members of the Leadership Team of each of the five schools and a focus group interview with a core group of Sisters of Saint Joseph. The semi-structured interviews and focus group interviews will be audio recorded and a transcript will be provided to participants for member checking.

• A copy of the questions to be asked in the semi-structured one to one interview and the focus group interviews has been attached for your information and consideration prior to the interview.

• Each semi-structured interview and focus group interview will take approximately 45 minutes.

• The semi-structured and focus group interviews will take place on each of the school sites at a time convenient to the participants.
Are there any risks associated with participating in this project?
There are no foreseeable risks in your participating in this research project.

What are the benefits of the research project?
The significance of the research project is in that the findings have the potential to form a body of knowledge to assist the Congregation of the Sisters of St Joseph of the Sacred Heart to identify and articulate the Josephite tradition in education in Australia, New Zealand, Peru and Timor Leste. The findings also have the potential to be shared with leadership personnel in Catholic Education in South Australia in the formation of Principal and the leadership teams of schools conducted in the Josephite tradition.

What if I change my mind?
Participation in this study is completely voluntary. Even if you agree to participate, you can withdraw from the study at any time without discrimination or prejudice. However, once the focus group interviews have been completed it will not be possible to withdraw your data from the project.

Will anyone else know the results of the project?
Information gathered about you will be held in strict confidence. This confidence will only be broken if required by law. All data collected in the study will be secured and coded to ensure anonymity of persons and school sites.

Once the study is completed, the data collected from you will be de-identified and stored securely in the School of Education at The University of Notre Dame Australia for at least a period of five years. The findings of the study will be published as a thesis and in academic articles. Given the relatively small network of schools conducted in the Josephite tradition it may not be possible to completely de-identify the schools in a publication.

Will I be able to find out the results of the project?
Once the information has been analysed the findings will be provided in the written thesis, which is expected to be submitted in July 2018.

Who do I contact if I have questions about the project?
If you have any questions about this project please feel free to contact either myself 0467583655 or email Catherine.mead1@my.nd.edu.au or my supervisor, Associate Professor Shane Lavery, 08 94330173 or email shane.lavery@nd.edu. My supervisor and I are happy to discuss with you any concerns you may have about this study.

What if I have a concern or complaint?
The study has been approved by the Human Research Ethics Committee at The University of Notre Dame Australia (approval number 017007F). If you have a concern or complaint regarding the ethical conduct of this research project and would like to speak to an independent person, please contact Notre Dame’s Ethics Officer at (+61 8) 9433 0943 or research@nd.edu.au. Any complaint or concern will be treated in confidence and fully investigated. You will be informed of the outcome.
How do I sign up to participate?

If you are happy to participate, please sign both copies of the consent form, keep one for yourself and mail the other to me in the envelope provided.

Thank you for your time. This sheet is for you to keep.

Yours sincerely,

Catherine Mead
RESEARCHER

Associate Professor Shane Lavery
Chief Supervisor
Appendix B: Consent form semi-structured one-to-one interviews

CONSENT FORM

Educational Leadership in the Josephite Tradition

Principal

- I agree to take part in this research project.
- I have read the Information Sheet provided and been given a full explanation of the purpose of this study, the procedures involved and of what is expected of me.
- I understand that I will be asked to participate in a semi-structured one to one interview with the researcher and that the interview will be audio recorded.
- The researcher has answered all my questions and has explained possible problems that may arise as a result of my participation in this study.
- I understand that I may withdraw from participating in the project at any time without prejudice.
- I understand that all information provided by me is treated as confidential and will not be released by the researcher to a third party unless required to do so by law.
- I agree that any research data gathered for the study may be published provided my name or other identifying information is not disclosed.

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<th>Name of participant</th>
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- I confirm that I have provided the Information Sheet concerning this research project to the above participant and have explained what participating involves and have answered all questions asked of me.

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Appendix C: Interview guide for semi-structured interview

Research Project:  
Educational Leadership in the Josephite Tradition

Research Question:

The overarching research question to be considered is twofold.

Firstly, what do Principals and their leadership teams, understand by the concept of a Josephite approach to education?

Secondly, in what ways do Principals and their leadership teams implement a Josephite approach to education in the context of the school community in which they serve?

Semi Structured Interview Questions - Principal

1. What do you understand by the term ‘Josephite tradition’?

2. What happens in this school that makes the Josephite tradition a reality?

3. What are the ways in which the school identifies the Josephite tradition to parents, staff, the School Board and students?
   How are the characteristics of the Josephite tradition identified in school celebrations?

4. What do you sense, or feel is important to this school community?

5. What do you identify as the main beliefs underlying a Josephite approach to education?

6. What is the range of ways you convey to staff, students and others your beliefs about a Josephite approach to education?

7. What symbols, signs, language or practices in this school best reflect the characteristics
of a Josephite approach to education?

8. What do you think families of students in your school identify as the characteristics and beliefs underlying the administrative practices in this school community?

9. What tangible and palpable characteristics and beliefs of a Josephite approach to education are evident in policies and procedures in this school community?

10. What influences the way in which you work with families in this school community?

11. Is there something you perceive in the Josephite tradition that would have been relevant in the past yet is no longer relevant today?

If you were to have a metaphor-image for leadership in this school context what would it be? What does this metaphor-image capture for you.
Appendix D: Consent form leadership team focus group interview

CONSENT FORM

Educational Leadership in the Josephite Tradition

School Leadership Team

- I agree to take part in this research project.
- I have read the Information Sheet provided and been given a full explanation of the purpose of this study, the procedures involved and of what is expected of me.
- I understand that I will be asked to participate in a Focus Group Interview as a member of the school Leadership Team with the researcher and that the interview will be audio recorded.
- The researcher has answered all my questions and has explained possible problems that may arise as a result of my participation in this study.
- I understand that I may withdraw from participating in the project at any time without prejudice.
- I understand that all information provided by me is treated as confidential and will not be released by the researcher to a third party unless required to do so by law.
- I agree that any research data gathered for the study may be published provided my name or other identifying information is not disclosed.

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Appendix E: Interview guide leadership team focus group interview

Research Project:
Educational Leadership in the Josephite Tradition

Research Question:

The overarching research question to be considered is twofold.

Firstly, what do Principals and their leadership teams, understand by the concept of a Josephite approach to education?

Secondly, in what ways do Principals and their leadership teams implement a Josephite approach to education in the context of the school community in which they serve?

Focus Group Interview Questions – Leadership Team

1. What do you understand by the term ‘Josephite tradition’?

2. How would you describe the Josephite tradition in this school community?

3. What are the ways in which the school identifies the Josephite tradition to parents, staff and students?
   How are the characteristics of the Josephite tradition identified in school celebrations?

4. What do you sense or feel is important to this school community?

5. What do you see are the most important aspects of a Josephite approach to education in this school?

6. What do you identify as the main beliefs underlying a Josephite approach to education expressed in the teaching and learning framework in this school?
community?

7. What symbols, signs, language or practices in this school best reflect the characteristics about a Josephite approach to education?

8. What tangible and palpable characteristics and beliefs of a Josephite approach to education are evident in policies and procedures in this school community?

9. What is it about a Josephite approach to education that influences the way in which you work with families in this school community?

10. Is there something in the Josephite tradition that was seen as relevant in the past yet is no longer relevant?

11. How might a visitor to this school know or experience the school as “conducted in the Josephite tradition”? How do former students describe the things that were important in their education in a Josephite school?
Appendix F: Consent form Sisters of St Joseph focus group interview

CONSENT FORM

Educational Leadership in the Josephite Tradition

Focus Group Interview- Sisters of Saint Joseph

• I agree to take part in this research project.
• I have read the Information Sheet provided and been given a full explanation of the purpose of this study, the procedures involved and of what is expected of me.
• I understand that I will be asked to participate in a Focus Group Interview as a Sister of Saint Joseph with the researcher and that the interview will be audio recorded.
• The researcher has answered all my questions and has explained possible problems that may arise as a result of my participation in this study.
• I understand that I may withdraw from participating in the project at any time without prejudice.
• I understand that all information provided by me is treated as confidential and will not be released by the researcher to a third party unless required to do so by law.
• I agree that any research data gathered for the study may be published provided my name or other identifying information is not disclosed.

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Focus Group interview Questions

Sisters of Saint Joseph

1. What did you learn about the Josephite tradition in the schools in which you were a student or a teacher? How did this influence your leadership as a Principal in a Josephite school?

2. When you visit schools conducted in the Josephite tradition and / or are in conversation with educators in the Josephite tradition, what is it that you most value in what you hear, feel and see? What gives you hope?

3. What would you identify as the most important features or characteristics essential in a Josephite approach to education?

4. What do you think is the greatest challenge for Principals in leading schools in the Josephite tradition today?

5. What is one core aspect of Josephite education you would not want to see lost in education today?
Appendix H: Approval UNDA Human Research Ethics Committee

8 February 2017

Associate Professor Shane Lavery & Ms Catherine Mead
School of Education
The University of Notre Dame Australia
Fremantle Campus

Dear Shane and Catherine,

Reference Number: 017007F
Project Title: “Educational Leadership in the Josephite tradition.”
Your response to the conditions imposed by a sub-committee of the university’s Human Research Ethics Committee, has been reviewed and assessed as meeting all the requirements as outlined in the National Statement on Ethical Conduct in Human Research (2007, updated May 2015). I am pleased to advise that ethical clearance has been granted for this proposed study.

All research projects are approved subject to standard conditions of approval. Please read the attached document for details of these conditions.

On behalf of the Human Research Ethics Committee, I wish you well with your study.

Yours sincerely,

Dr Natalie Giles
Research Ethics Officer
Research Office
cc: A/Prof Dianne Chambers, SRC Chair, School of Education

THE UNIVERSITY OF NOTRE DAME
AUSTRALIA
19 Mount Street P.O. Box 1224 Fremantle WA 6910
+61 8 9433 0555 | enquiries@nd.edu.au

nd.edu.au
Appendix I: Approval Catholic Education South Australia Adelaide

Catherine Mead
2/47 Thornton Street
KENSINGTON SA 5068
Email: Catherine.mead1@my.edu.au

Dear Sr Catherine

RE Educational Leadership in the Josephite Tradition

Thank you for your email of 15 February 2017 in which you seek permission to conduct research in South Australian Catholic schools. I am pleased to advise your research proposal is approved subject to the following conditions:

- permission of the principal of the school is required
- individual students, schools and the Catholic sector itself is not specifically identified in published research data and conclusions
- the permission of parents of each child involved in the study and the participating teachers has been obtained
- the research complies with the ethics proposal of the ethics committee
- the research complies with any provisions under the Privacy Act that may require adherence by you as researcher in gathering and reporting data
- the presentation in the school is carried out within view of the classroom teacher or authorised school observer
- no comparison between schooling sectors is made
- sector requirements relating to child protection and police checks are met by researchers:
  - where researchers obtain information in relation to a student which suggests or indicates abuse, this information must be immediately conveyed to the Director of Catholic Education SA
  - all researchers and assistants, who in the course of the research interact in any way with students, are required to provide evidence of a clearance letter issued by the Catholic Archdiocese of Adelaide Police Check Unit (ph:08 8210 8267) or another form of acceptable police clearance.

At the conclusion of the study a copy of the research findings should be forwarded to:
Director
Catholic Education Office
PO Box 179
TORRENSEVILLE PLAZA SA 5031
or
director@cesa.catholic.edu.au

Please accept my very best wishes for the research process.

Yours sincerely

MONICA CONWAY
ASSISTANT DIRECTOR
27 February 2017
REF: 201703
Appendix J: Approval Catholic Education South Australia Pt. Pirie

Sr Catherine Mead
2/47 Thornton Street
KENSINGTON SA 5608

Dear Catherine

Re: Research Project – Education Leadership in the Josephite Tradition

I am pleased to advise that, in relation to the three schools in the Diocese of Port Pirie, your research proposal is approved subject to the following standard conditions:

1. The decision as to whether or not research can proceed in a school rests with the Principal of that school. You will therefore need to obtain approval directly from the Principal of each school that you wish to involve.
2. You should provide each Principal with an outline of your research proposal and indicate what will be asked of the school. A copy of this letter of approval and a copy of the notification of approval from the relevant Ethics Committee should also be included.
3. No student is to participate in research study unless s/he is willing to do so and informed consent is given by a parent/guardian.
4. You should provide a list of schools which have agreed to participate in the research project.
5. Any substantive modifications to the research proposal, or additional research using the data collected, will require a further research proposal approval submission to this Office.
6. Data relating to individuals or schools is to remain confidential.
7. Since participating schools have an interest in the research findings, you should discuss with each Principal ways in which the results of the study could be made available for the benefit of the school community.
8. At the conclusion of the study a copy of the research findings should be forwarded to:

Catholic Education Office, Port Pirie
Attn: Director

I wish you well with your research study. If you have any queries concerning this matter, please contact Cathy Parker (Tel: 8632 0500) of this Office.

Yours sincerely

Brenda Keenan
DIRECTOR

16 February 2017
Appendix K: Approval Trustees Sisters of St Joseph

30 September 2016

To Whom It May Concern

The Trustees of the Sisters of Saint Joseph are aware that Catherine Mead rsj has submitted a Proposal for a research study towards a Doctorate in Education titled Educational Leadership in the Josephite Tradition. This proposal has been approved by the University of Notre Dame Australia and the research proposal approved by the University Notre Dame Australia Human Research and Ethics Committee.

The purpose of the research is to explore the characteristics and features of a Josephite approach to education that are identified and implemented by Principals and their leadership teams in schools conducted in the Josephite tradition.

The research method is an instrumental case study conducted across six schools conducted in the Josephite Tradition. One of the schools invited to participate in this research project is owned and governed by the Trustees of the Sisters of Saint Joseph of the Sacred Heart.

The Trustees of the Sisters of Saint Joseph of the Sacred Heart approve the research to be conducted by Catherine Mead rsj and confirm the ethical considerations and approval provided by the University of Notre Dame, Australia Human Research and Ethics Committee.

Yours sincerely,

Monica Cavanagh

Sr Monica Cavanagh rsj
Congregational Leader
Sisters of Saint Joseph of the Sacred Heart
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