Formation for mission for middle leadership in Catholic secondary schools

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FORMATION FOR MISSION FOR
MIDDLE LEADERSHIP
IN CATHOLIC SECONDARY SCHOOLS

Submitted by

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Statement of Authorship

This thesis contains no material published elsewhere or extracted in whole or in part from a thesis by which I have qualified for or been awarded another degree or diploma.

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All research procedures reported in the thesis received the approval of the Human Research Ethics Committee of the Australian Catholic University.
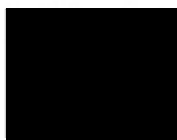
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Dedication and Acknowledgements

To my three beautiful children the most precious gifts in my life – Joshua, Gabriella and Lachlan. Your unwavering support, love, compassion and strength of character are inspirational.

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List of Abbreviations

ACU – Australian Catholic University

ACT – Australian Capital Territory

ABS – Australian Bureau of Statistics

BEd – Bachelor of Education

NCEC – National Catholic Education Commission

CEC – Catholic Education Commission

CECNSW – Catholic Education Commission New South Wales

CECV – Catholic Education Commission of Victoria

CEO – Catholic Education Office

HREC – Human Research Ethics Committee

MEd – Master of Education

NCEA – National Catholic Education Association

NCLS – National Church Life Survey

NCPR – National Centre for Pastoral Research

NSW – New South Wales

PCA – Principal Component Analysis

QCEC – Queensland Catholic Education Commission

RE – Religious Education

RSQ – Research Sub-Question

SCS – Sydney Catholic Schools

Glossary of Terms

classroom – a generic term that refers to a venue where learning can take place. This includes, but is not limited to, outdoor spaces, labs, halls, workshops and in more recent times, online spaces.

formation for mission – the ongoing cultivation and maintenance of the spirituality of lay teachers in Catholic schools. The Church has acknowledged that teaching in Catholic schools is a vocation that is integral to the mission of the Church.

lay leadership – the non-clerical men and women who now hold leadership positions in Catholic schools.

middle leaders – formally designated leaders who operate between senior leaders and teachers in the school context and lead in order to favourably impact teaching and student development. They have accountable responsibilities and, while holding an acknowledged leadership position, middle leaders also have some teaching responsibilities.

new evangelisation – a call to a new means to interpret and live out the Gospel in light of the "signs of the time". Pope John Paul II first proposed the idea, which meant that "countries and civilisations that had previously been evangelised had lost the vigour of faith and were required to accept the Gospel in a fresh and vital way in order to be won back to Christ" (Porteous, 2008, p. 11).

parish – an ecclesial entity that has traditionally linked closely with the Catholic school as part of the same Catholic community. Catholic school leaders collaborate with parishes to foster communities where prayer, Sacred Scripture, the Eucharist, the sacraments, and other Catholic symbols aid students in developing personal relationships with Jesus.

personal witness – the ability and desire to share Christian testimony, support the Church's evangelisation efforts and Catholic identity. It is an indication of adherence to the moral and theological teachings of the Catholic Church, which may involve taking part in

parish activities such as the Eucharist and more broadly, parish life (Sydney Catholic Schools, 2019). It is the daily living of the Gospel that animates the relationship with Jesus and is the way of living a life that is modelled on the person and example of Christ.

practice of middle leading – leading and teaching by managing and facilitating the educational development of all community members through collaborating and communicating to create opportunities for growth.

praxis - in a religious sense, a combination of reflection and action characterised by thought and purpose has come to represent the practical application of one's faith, wherein one's activities are influenced by one's faith. Praxis is demonstrated in outcomes that involve the head (mind), heart (feelings) and hands (actions) of being where faith and living are brought together.

secondary school – Colleges and educational institutions for academic years 7–12 (predominately students aged between 12 and 18). In the Australian context, students graduate from Year 12 to move to university or other pursuits.

Sydney Catholic Schools – a system of 150 Catholic primary and secondary schools functioning throughout the Archdiocese of Sydney, delivering Catholic education to over 70,000 students.

vocation – the call to teach and the opportunity to participate in Christ's ministry within a Catholic religious setting. Every teacher in the Catholic school community is called to ministry because they participate in the religious life of the school by bearing testimony, becoming involved, and taking action. The word – derived from the Latin *vocare*, meaning to call – is critical to the religious identity of the school.

Abstract

The era of cleric led and staffed Catholic schools is long gone. The reality that lay men and women are now charged with the responsibility to lead Catholic schools presents both challenges and opportunities. The mission of the Catholic secondary school, as an agent of the Church, is to evangelise and this evangelisation responsibility now rests with lay men and women who are leading Catholic schools. This research, which focuses on middle leadership in Catholic secondary schools, seeks to investigate and explore the formation programs and opportunities for these lay men and women so that they may take up their post with confidence, integrity and ecclesial understanding so as to enable Catholic schools to achieve their mission. This mission of the Catholic secondary school, as an agent of the Church and alongside other Church entities, is to evangelise and this evangelisation responsibility now rests with the lay leadership of Catholic schools in a brave new era.

The current milieus within which these schools operate – characterised by the minimal presence of religious clerics who are dedicated to teaching and learning, the non-practicing tendencies among many self-declared Catholics, and the limitations of the middle leaders' deep religious knowledge and literacy – present challenges in achieving the "new evangelisation" and meeting the ecclesial expectations of the Church. Middle leaders in Catholic secondary schools are assumed to have sufficient ecclesial understanding congruent with that of the Church to lead student learning, pastoral care, wellbeing, and religious education.

This study, which was conducted in the Archdiocese of Sydney, focuses on the religious formation for mission of middle leaders and the role they perform in Catholic secondary schools. Its major research question was: "*What is the nature and aspects of religious formation provided to middle leaders in Catholic schools? And how do these middle*

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leaders view their formation experience for leadership in a Catholic school?" Four related

sub-questions were employed to guide the methodology, data collection and analysis.

The study adopted a case study within a mixed-methods design methodology for data

collection and analysis and data were collected through an online survey, document analysis,

and semi-structured interviews. The major findings of the study are the wide recognition of

the importance of the role of middle leaders in Catholic secondary schools in leading the

Church's evangelisation mission, the presence of a gap in the provision of formation

opportunities to help them to articulate the faith dimension of their leadership role, and the

need for a new paradigm for religious formation programs for these leaders that provides

guidance and purpose, builds confidence in religious literacy and understanding, and is

adaptable and sustainable.

Because of the secular and pluralistic world in which Catholic schools exist, the

changing Church demographics highlight that the traditional patterns of religious formation

on which the Catholic Church and Catholic schools have relied for many years are no longer

relevant, and that middle leaders require a religious formation that is equivalent to their

professional formation. Religious formation for mission is critical to the religious leadership

of middle leaders and their evangelising role in Catholic secondary schools. The Church

recognises that genuine faith cannot be imposed: it is freely accepted or rejected. If the

educational and catechetical goals are explicit and openly stated, then middle leaders might be

encouraged to engage with open hearts and thinking minds, and to embrace the formation

opportunities afforded them. This then may meet Pope Francis' call for Catholic schools to be

led and staffed by missionary disciples.

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Chapter 1: Introduction and Research Context

1.1. Introduction

The "raison d'être of the Catholic school is to educate in the Catholic faith" (Gleeson, 2015, p. 151). In order for a Catholic school to justify its existence it must be distinguished by its Catholicity which in turn creates a challenge for Catholic school leaders. Given the rapidly changing context both within the Church and in education more generally, and the consequent changing roles, responsibilities and pressures on middle leaders in Catholic schools, this chapter argues for the importance of middle leader formation for mission and leadership in Catholic secondary schools.

Pope Francis (2019) speaks of change, not within the current era, but in terms of a changing era. Leadership in faith in Catholic secondary schools continues to be subject to significant change. Any discussion on faith leadership in Catholic secondary schools must take place within both an educational and ecclesial context. By examining the identity of Australian Catholic schools, their purpose and mission, contextualised within the mutable landscape of the Catholic Church, it is possible to become more aware of the formation for mission challenges facing middle leaders in Catholic education today in order to inform directions for the future. Through what he refers to as *synodality* Pope Francis hopes to alter Church culture. Benjamin and Burford (2021) claim that in this case, "synodality incorporates something much richer than simply a culture of greater consultation and dialogue" (p. 31). When a Catholic school's leadership, including middle leadership, has a solid understanding of and support for the purpose of the Catholic Church, synodality within that school is attained. The faith leadership role of Catholic school middle leaders, which is in addition to their educational leadership role, is about evangelisation and this is achieved through their everyday work.

It is suggested that middle leaders have the ability to have an impact on school improvement in the educational setting, where the impact of middle leadership is of major interest (Bryant, 2019). Lipscombe et al. (2021) provides a contemporary understanding of middle leadership and describes the position of middle leader as "a teacher with formal leadership responsibilities" (p. 6). This builds upon the work of Grootenboer et al. (2020), which refers to middle leaders as leaders in schools who have both teaching responsibilities and an acknowledged leadership position and the work of De Nobile (2019), which characterises middle leaders in schools as regular classroom teachers with added duties. Middle leadership positions can be considered as essential to a school's development, and they are major participants in schools that have an impact on the communication between peer teaching colleagues and more senior leaders (Lipscombe et al., 2021). Middle leaders often operate and are positioned between senior leadership and teaching staff, being members of both groups. Managing conflicts brought on by the demands of managing expectations from both above and below is one challenge of the role. The research of Marshall (2012) describes it as "being caught in between or sandwiched between senior management to whom they are accountable ... and subordinates for whom they have some functional and often moral responsibility" (p. 511). This tension may well be exacerbated by additional ecclesial responsibilities of middle leaders in Catholic schools.

The purpose, mission, identity and values of the Catholic school as highlighted in official magisterial documents articulate the ecclesial and Church expectations of middle leaders in Catholic secondary schools. It needs to be highlighted that these expectations may be perceived as in addition to the generic leadership expectations required of middle leaders with regard to their leadership portfolio. The reality is that these ecclesial expectations permeate every aspect of the role of middle leader and for that reason any preparation program for leading mission needs to demonstrate coherence between generic leadership competencies and the necessary competencies required to lead the mission of the Catholic

school. There is also a need for coherence between the conceptual ecclesial exceptions of Catholic schools and the operational policies and programs. This study highlights this distinction and provided the researcher with insights about the Church's expectations of the leaders generally - and middle leaders in particular - in Catholic secondary schools.

In an ecclesial context, middle leaders in Catholic schools are expected to have sufficient ecclesial understanding congruent with that of the Church. Additionally, middle leaders are required to actively support the school's Catholic mission and identity as well as to be "new evangelists" who can "proclaim and spread" the Gospel (Pontifical Council for Promoting New Evangelization, 2020, p. 31). The mission of the secondary Catholic school, as an agent of the Church, is to evangelise – a responsibility that now rests with lay men and women who are charged with leading Catholic schools. This study, based in the Archdiocese of Sydney, focuses on the formation for mission of middle leaders and their role as leaders in faith, or faith mentors as posited by Buchanan et al. (2021), in Catholic secondary schools. Specifically, it seeks to explore the extent to which middle leaders in Catholic secondary schools feel that their formation for mission and ecclesial preparation is appropriate to lead the evangelising mission of the Church, how they consciously construct their own personal Catholic identity, how middle leaders perceive their role as faith leaders, and how they experience and understand religious formation for leadership. In reality, these middle leaders in Catholic schools may not be equipped educationally, pastorally or religiously to carry out these expectations.

The importance of formation for mission for middle leaders in Catholic schools is gaining momentum. Recently, Archbishop Anthony Fisher OP wrote of formation as being an immediate and future priority for mission in the Catholic school, and that all involved should embrace formation for mission (Fisher, 2022). Sultmann et al. (2022) highlight the "niggling concern that the future identity of our Catholic schools is precipitous without more confidently committed educators and leaders understanding and witnessing to faith within

authentic educational practices" (p. iii). Despite the acknowledgement of the important role middle leaders play in the educational context and in improving student outcomes, little attention has been given to the formation for mission of middle leaders to prepare them for their ecclesial leadership roles. Additionally, there is little research to support and guide the crucial evangelising role they perform.

Despite the fact that middle leadership in schools and their educational role have received considerable scholarly attention, it remains "unclear exactly how far the knowledge base has expanded or deepened and how far the shortcomings of this evidence base have been adequately addressed" (Harris et al., 2019, p. 257). Despite the growing body of research on middle leadership, professional learning and formation for middle leaders should be tightly matched to the specific requirements of their particular role "ambiguity still exists in relation to what middle leaders are expected to do" (De Nobile, 2018, p. 396). As cited by Harris et al. (2019), there is a need for further research; they argue, "while much has been written about middle leaders and middle leadership since 2003, how far this constitutes a significant gain in empirical understanding or a demonstrable contribution to knowledge remains debatable" (p. 277). Given the role that middle leaders play in schools, and the fact that their work is integral to the mission of the Church, exploration of middle leadership formation is both warranted and overdue. This study on the formation for mission for middle leadership in Catholic secondary schools seeks to fill that void, providing a particular focus on the additional yet essential ecclesial responsibly and expectation of middle leaders.

1.2. Research context

1.2.1. The ecclesial identity of Catholic schools

Catholic school mission is derived from the mission of the Church. Catholic schools are essential to the evangelisation efforts of the Church in Australia, as was highlighted at the

Synod for Oceania Conference (2001). Pope John Paul II recognised the ecclesial identity of Catholic schools when he said that "the Catholic school is part of the evangelising mission of the Church" (2003, p. 7). More recently, *Educating to Fraternal Humanism* (2017), produced from the Congregation for Catholic Education, contextualises the vision for Catholic education within the wider Church, emphasising the need for Catholic schools to be a formative and evangelising place. Catholic education is education that is formative, developmental, integrated and aligned to the Gospel of Jesus, the Traditions of the Church, and the experience of abundance in life and living (Sultmann et al., 2022). As a result, the Catholic school is required by the Church to maintain its ecclesial identity. The school's Catholic identity is a reference point for determining how to educate its students. These cannot be schools that simply have a memory of Catholicity, but a vibrant, living and tangible expression of that Catholicity (Chambers, 2015).

Catholic educational institutions have a unique mission based on the principles of the Gospel. However, in a "globalised post-modern world characterised by moral relativism, secularism, and materialism, they face significant challenges" (Fincham, 2010, p. 64). These challenges arise from the reality that future leaders of Catholic schools are immersed in the post-modern world that Fincham (2010) describes, which presents challenges for the future of Catholic schools. It is these future leaders, the current middle leaders of Catholic secondary schools, who find themselves in this post-modern world and who must grapple with the changing Catholic context.

The Catholic landscape in Australia continues to change and Catholic schools as such need to be dynamic, adaptable and responsive to the needs of the times. There has been a breakdown in religious culture in a time of both secularism and pluralism (Rossiter, 2013). In Australia, this breakdown has manifested itself in a reduced commitment to Catholic doctrine and practises (Dixon, 2002, 2005; Rossiter, 2013). Ecclesia in Oceania (John Paul II, 2001) urges for re-evangelisation and enculturation of the Gospel message with a focus on how

young people join in the Church in response to this breakdown in traditional religious culture. This document specifically mentions the role of teachers in Catholic schools:

> the great challenge for Catholic schools is an increasingly secularized society is to present the Christian Message in a convincing and systematic way. School staff, who truly live their faith, will be leaders of the new evangelisation in creating a positive climate for the Christian faith to grow a spiritually nourishing the student entrusted to their care.   (Pope John Paul II, 2001, para. 115–117)

Accordingly, teachers in Catholic schools are then challenged to model, both by their words and their actions, what it means to follow Christ. Given this reality, Neidhard and Lamb (2016) express the need to pay attention to the next generation of faith leaders and provide formation for mission opportunities for future leaders. They were worried that future religious leaders might not have the necessary knowledge, abilities, and attitudes to successfully lead Catholic schools. Pollefeyt and Richards (2020) call for Catholic schools to integrate mission with culture and curriculum through recontextualisation, where the traditional modes of evangelisation and the heterogeneity of the student and staff profile are now called to take on a new approach. The make-up of Catholic schools, and those who attend has changed and what was once assumed, when schools were staffed and led by Clerics, can no longer be assumed. This is relevant to this study because one seeks to understand that the knowledge, skills, and attitudes held by current middle leaders in Catholic secondary schools must meet the challenges of leadership in faith in Catholic schools, as claimed by Neidhard and Lamb. This challenge within Catholic education exists within a new cultural context (Gleeson, 2020), with the need to construct Catholic school identity in a pluralist culture while maintaining tradition. This leadership challenge is further contextualised with the inclusion and presence of non-Catholic teachers and students and the reality that non-Catholic leaders hold middle leadership positions, which has an impact on

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leading faith, especially within the expected roles of middle leaders in Catholic secondary schools.

There needs to be an acknowledgement that for most students and families, the school is their primary "Church" experience (Sultmann & Brown, 2019). *Who is coming to school today?* (McQuillan, 2009) identifies that staff strongly endorse the significance of religious faith and practise to school life. The survey that informed this work, which involved around 27,000 people, found that a significant challenge for the future is to maintain the "strong Catholic identity" of schools, as for many the Catholic Church can only be reached via them. McQuillan (2009) noted that while greater numbers of people seem to be turning away from institutionalised Churches, there is an increase in the number of parents wanting their children educated in a Catholic school. The National Catholic Education Commission (NCEC) Report of 2016 indicated that 69 per cent of students in Catholic schools identified as Catholic compared to 31 per cent identified as "other than Catholic" (the proportion of those identifying as "other than Catholic" in Catholic secondary schools is 33 per cent compared with 29 per cent in primary Catholic schools). This highlights the important ecclesial responsibility placed on those who hold leadership positions in Catholic secondary schools.

1.2.2. The purpose of the Catholic secondary schools

The mission of the Catholic school is derived from the mission of the Church given the Catholic school is:

> a genuine instrument of the Church, a place of real and specific pastoral ministry ... The ecclesial nature of the Catholic school, therefore, is written in the very heart of its identity as a teaching institution … It must be emphasised that this ecclesial dimension is not a mere adjunct, but is a proper and specific attribute, a distinctive characteristic which penetrates and informs every moment of its educational activity, a fundamental part of its very identity and the focus of its mission. (Congregation for Catholic Education, 1998, para. 11)

The document *Educating to Fraternal Humanism* (Congregation for Catholic Education, 2017), provides a modern vision for Catholic education that is based on religious principles and is sensitive to the signs of the times. Catholic secondary schools, in the eyes of the Catholic Church, are an essential component of its larger evangelisation goal and, in some ways, are a symbol of the extensive and successful ministry within the Church (Williams, 2004). Schools provide an education in a faith-based environment that enables students to gain the ideals and knowledge necessary to take an active role in their religion communities.

D'Arbon et al. (2001) emphasise the need to create a plan to guarantee a steady stream of senior leaders who are both highly qualified and motivated for Catholic schools across the NSW and Victoria Catholic school system. The senior leaders to whom D'Arbon et al. (2001) refer will come from the current ranks of middle leadership; therefore, an understanding of the current formation opportunities available to them for leadership in the Catholic context is necessary.

The Catholic School on the Threshold of the Third Millennium (Congregation of Catholic Education, 1998) affirms the evangelising role of the Catholic school and emphasises the mission of the Catholic school in relation to the moral and religious dimensions of human growth. In addition, "A school is … a privileged place in which, through a living encounter with a cultural inheritance, integral formation occurs" (Congregation for Catholic Education, 1977 para. 26). It goes on to say:

> it must develop into an authentically formational school ... It must develop persons who are responsible and inner-directed, capable of choosing freely in conformity with their conscience. This is simply another way of saying that the school is an institution where young people gradually learn to open themselves up to life as it is, and to create in themselves a definite attitude to life as it should be. (Congregation for Catholic Education, 1977 para. 31)

More recently, the vision for the Catholic school as a place of education has been summarised in *Educating to Fraternal Humanism* (CCE, 2017). Humanising education means

putting people at the centre of education within a relationship-based framework that "form a living community, interdependent and bound by a common destiny" (Congregation for Catholic Education, 2017, p. 7). In particular, it is in the character of Catholic schools to seek the development of the "whole, integrated person", and "demand that Catholic schools include the physical, intellectual, vocational, social, emotional, aesthetic, moral and religious dimensions" of the person (Flynn & Mok, 2002, p. 12 & 77). This, of course, will become more difficult in some respects as today's Catholic schools admit more and more students who are not Catholic (Chambers, 2012).

Chambers would contend that as Catholic schools now struggle with the rising number of non-Catholic pupils, they "would do well to remember that authentic Catholic expression requires not only a quiet upholding of the principle of religious freedom, but also a bold promotion of that principle" (2012, p. 192). Given religious diversity is a feature of the Catholic school's clientele, it is a privilege. While the enrolment of non-Catholic students has increased, it is noted that the percentage of teachers who are non-Catholic has remained constant from 2001 to 2010 (Catholic Education Commission New South Wales, 2011). There were approximately 91,000 staff in Catholic schools in 2016, of whom 80 per cent of primary school teachers and 61 per cent of secondary school teachers identify as Catholic (National Catholic Education Commission, 2016). The report adds of those staff who identify as Catholic, 25 per cent are engaged in regular worship and "for most staff, the Catholic school is their only regular experience of Catholicism" (National Catholic Education Commission, 2016, p. 11). This presents future challenges for Catholic schools, particularly in the provision of formation programs and, for the purposes of this study, where there is the presence of non-Catholic leaders and the resulting challenges, issues and impacts this has on leading faith in a Catholic community.

It is a reality that for many students their only contact with the wider Church is through school. Canavan (2009) asserts that school administrators are well aware of the fact

that many families' main interaction with God and the Church founded by Jesus Christ, occurs at the Catholic school. Schools must seize this chance to introduce or reacquaint pupils with the greater Church and, if possible, their families. It should be noted that the faith dimension of the school is in addition to all other dimensions that exist in non-religious schools. Any effective school can be measured by the quality of its relationships, which exist in many schools, not just Catholic ones.

Given the important purpose and mission of the Catholic school, and the pivotal role of the teacher in a Catholic school both professionally and vocationally, the consequent need for formation for mission of those charged with the responsibility of Catholic education becomes more evident. Rymarz (2010) rightly asserts that the individuals connected to Catholic schools are what give them their identity, and that Catholic identity depends on a significant number of individuals who give concrete witness to the beliefs of the organisation. The role of the teacher is crucial for this reason.

1.2.3. The teacher in Catholic schools

Jesus was often addressed by his disciples as *Teacher*. Apart from the title *Lord,* Jesus is called *Teacher* more often than any other epithet in the New Testament, and often with great respect and admiration (Mark 10:17; Matt. 22:16). The term *teacher* is synonymous with education. Pope Benedict XVI emphasises the importance of education to the Church's mission to spread the Good News (2008). Given the position of teachers and the impact they have on young people, the vocation of teaching is therefore significant. The additional faith and missional tasks lend further significance to the vocation of teaching in a Catholic school, where the school is the main educational arm for Catholic families and the wider Church (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007).

When the teaching vocation in Catholic schools is viewed through this lens, the role becomes clear. Catholic schools were established to support the evangelising mission of the

Church and are seen by many Catholics, both lay and ordained, as part of the history and vision of the Church's tradition and mission (Groome, 1996). It can also be seen that mission originates from God (Bevans, 2009). The clear emphasis on the teacher in Catholic schools was established at the Second Vatican Council (1961–65):

> teachers must remember that it depends chiefly on them whether the Catholic school achieves its purpose. (Gravissimum Educationis, 1965, n. 8)

It can then be seen that the need for formation and development in this very important role of teaching and leading, be deepened and nurtured. The sanctity and significance of the Catholic lay educator were emphasised by the Congregation for Catholic Education in 1982.

> ... personal sanctification and apostolic mission [are] two inseparable elements in a Christian vocation. It requires a human and well-rounded formation, as well as a formation in spirituality and doctrine. (Congregation for Catholic Education, 1982, n. 65)

Today, the Church recognises the ability of the laity to guide young people to follow Gospel values as members of the Church. The "laity live in the midst of the activities and vocations of the world and in the ordinary circumstances of family and social life" (Second Vatican Council, 1965, n.32). The role of the laity in Catholic schools has evolved as they grow into leadership roles such as principals and assistant principals that were once predominantly held by religious. Huber (2009) asserts that the document *Education Together in Catholic Schools: A Shared Mission between Consecrated Persons and Lay Faithful* (2007) from the Congregation for Catholic Education affirms that authentic lay people, by living out their faith in the everyday of their families, can help the entire school community more accurately discern the Gospel values that these signs of the time contain. Considering that the formation of lay teachers is a recent phenomenon, it is worth noting that the lay vocation is combined with the vocation to be spouses and/or parents. Palmer (1998) would suggest that an integrated, non-shared life brings authenticity to the work of teachers.

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Therefore, we can see the need for religious formation for mission for those charged with the responsibility of Catholic education. It should also be noted that lay people in Catholic schools have made a clear choice to teach and lead in Catholic education (Lacey, 2000). The focus on hiring and keeping teachers in Catholic schools has shifted away from the clergy and towards lay people who, despite having the option to teach in public schools, have opted to pursue their vocation as teachers in Catholic schools (Lacey, 2000).

Sultmann and Brown's (2019) study on the relationship between mission and teacher identity examines how teacher identity relates to the overall identity of the Catholic school and how this affects student growth and learning. According to the research, teaching is considered a ministry and the expectations of the profession are embraced by Catholic schools. As Palmer points out in *Courage to Teach: A Guide for Reflection and Renewal* (1999), the majority of teacher professional development focuses on "what" teachers do or "how" they carry out their duties, but the "why" is taken into account far too infrequently. Furthermore, *Educating Together in Catholic Schools* (Congregation for Catholic Education, 2007) denotes the communitarian nature of Catholic education. "By its very nature, Catholic schools require the presence and involvement of educators that are not only culturally and spiritually formed but also intentionally directed at developing their community educational commitment in an authentic spirit of ecclesial communion" (n. 34). Teachers of religion in Catholic schools accounted for 0.6 per cent of all teachers in 2010. This proportion has steadily declined in recent years, from 6.0 per cent in 1988 (Catholic Education Commission New South Wales, 2011). On the one hand, spiritually and culturally literate teachers are needed, but on the other hand, it seems that their numbers are rapidly declining.

With the shift from religious to lay teachers and leaders, systematic processes have been developed in an attempt to ensure the Catholicity of schools. There have been systems approaches to the governance of schools that emphasise the importance of education. Strong Catholic Education Offices are now present in every diocese, at the state level, and in the

National Catholic Education Commissions, which is another important development in Catholic education (Canavan, 1998). Canavan's (1986) work documents the growth of the Catholic Education Office bureaucracy and the impact of its processes on schools. The 11 Catholic Education Offices in NSW are now in charge of the quality assurance procedures leading to the state registration and certification of Catholic parochial primary schools and diocesan secondary schools as a result of the NSW Education Reform Act (1990) (Canavan, 1998). One such example of these processes is the Policy on Accreditation for Working, Teaching and Leading (Catholic Education Office Sydney, 2011).

In Sydney Catholic schools, there has been a smooth transition from religious to lay teachers since the Second Vatican Council (1962–1965), after being staffed almost exclusively by religious teachers until 1950 (Canavan, 1998). In 1972, all Catholic schools in Sydney had a religious principal. In 1996, this figure was 19 per cent (Canavan, 1998). In 2008 this was down to 5 per cent, and with religious principals soon to retire, the number is expected to decline further (Catholic Education Commission New South Wales, 2011). This underscores both the importance and the unique mission of the lay educator and especially both the aspiring and middle lay leaders in Catholic schools (D'Arbon et al., 2001; McLaughlin, 2002, 2005). In light of this, research examining the values and experiences of lay educators, and middle leaders specifically, is particularly relevant to this study.

1.2.4. Lay middle leadership

Examining the concept of educational leadership, in a broader definition of leadership that incorporates the duties of all in the educational enterprise, has importance in the context of lay ecclesial ministry. This is even more pronounced when one considers that there is a significant proportion of lay leadership in Catholic schools. The importance of lay employees in Catholic schools to the mission of the Church needs to be emphasised. There have been studies of the demands on school leaders working in Catholic schools (Cannon, 2004; Elvery,

2013; Lavorato, 2017; Mellor, 2005; Sinclair & Spry, 2005). Each has discussed the challenges faced by Catholic school leaders in the face of changing demographics, tension between the parish and the school, and constant social change. It is also vital to look at how the many other people who make up the school community lead. These many others are best described as middle leaders.

There has been significant research on middle leaders, some of that research seeking to define the term itself, (Fitzgerald & Gunter, 2006; Flessa, 2012; Grootenboer et al., 2020; Gurr & Drysdale, 2013; Hammersley-Fletcher & Strain, 2011; Lipscombe et al., 2021; Marshall, 2012; Wise, 2001) given that the term *middle leader* can refer to a number of positions in schools in a variety of different contexts. Lipscombe et al. (2021) found that *middle leadership* is complex, diverse and problematic to define. Wise's (2001) definition points to a number of subgroups in schools that contribute to a learning agenda. That is, middle leaders "including department and subject leaders, curriculum team leaders, and cross-curricular coordinators who are expected to have responsibility for one or more teachers" are also "responsible for some aspect of the academic curriculum" (Wise, 2001, p. 334). While Gunter and Ribbins (2002) refer to middle leaders in terms of pastoral responsibilities, Schleicher (2012) gives a broader definition of middle leaders as teacher leaders who are "responsible for teams, grade levels, or curriculum areas" (p. 21). Lipscombe et al. (2021) provides a current understanding of middle leadership and describes the position as "a teacher with formal leadership responsibilities" (p. 6). This builds upon the work of Grootenboer et al. (2020), which refers to middle leaders as leaders in schools who have an acknowledged leadership position and some teaching responsibilities. These middle leaders are best described as:

> middle leaders have more day-to-day impact on standards than head teachers.
> Middle leaders are, simply, closer to the action. Teachers' and pupils'
> experience of leadership comes most frequently from their middle leaders. And

the essential work of curriculum planning, monitoring and developing teaching
belongs with middle leaders.   (Hobby, 2016)

The influence of middle leadership is significant, of great interest and worthy of
careful consideration. It has been argued that middle leaders have the potential to improve
school performance (Bryant, 2019; Gurr & Drysdale, 2012). However, current research has
particularly focused only on pedagogy and learning (Bassett, 2016; Gurr & Drysdale, 2012).
In examining the current challenges in school leadership in "five Canadian provinces, four
U.S. states, United Kingdom, New Zealand, and Victoria, Australia" Renihan et al. (2006, p.
12) found that leading learning cannot be the sole responsibility of the school leader; rather, it
is the role of the school leader to "convene coalitions of individuals, organisations, and
additional resources required to accomplish targeted objectives to improve educational
outcomes" (p. 18). It can be inferred that a principal acting alone will not be able to
successfully implement a school reform initiative: "Even the best principals cannot single-
handedly transform a school" (National Staff Development Council, 2000). For the purpose of
this study, this underscores the importance of the impact that middle leaders, in conjunction
with the principal, have on the leadership of a faith community. Much of the recent literature
on middle leadership also emphasises how middle leaders, through their direct and positive
influence, play a crucial role in ensuring better learning outcomes for students. (Bassett, 2016;
Lipscombe et al., 2021).

Maintaining Catholic identity is a struggle, pointing to the need for further
examination of formation for mission for middle leaders, given their sphere of influence. It
can be seen that American Catholic schools have experienced a significant decline in recent
years. According to O'Keefe (2008), America's urban Catholic schools are in crisis, and he
notes that over 1300 urban schools have closed since 1990. Concerningly, almost half of the
Catholic schools that were operating in 1960 have since shut (Cook & Thomas, 2011). In the
midst of a worldwide boom in Catholic education, the Church in the United States has

suffered a dramatic decline in its educational apostolate. The number of Catholic schools declined by 25.7 per cent between 2000 and 2013 (National Catholic Educational Association, 2013). Remaining authentically Catholic and forming middle leaders is critical to the viability, sustainability, and future of Australian Catholic schools.

Over the last half century, a discernible transition from religious to lay staff has occurred in Catholic schools. If Catholic schools are to preserve the distinctive features of their founding communities in the face of declining religious, the formation of lay staff and those who lead the school is critical. In the 2012–2013 school year in the USA, the number of professional staff who were religious/clergy was 3.2 per cent, while lay staff made up 96.8 per cent of the staff in schools that identified as Catholic (National Catholic Educational Association, 2013). Cook & Hudson (2003) suggest that: "The teacher shortage is having an impact on American schools. The shortage is a result of the dramatic decline in religious and clergy serving as Catholic high school teachers. Since 1995, their numbers have roughly halved, dropping from 42% to 24%" (p. 4). Cook & Hudson (2003) then aptly predict that the current shortage of qualified religious education teachers is critical and will worsen in the future. They also add that "we must remember that teachers and educators fulfil a specific Christian vocation and have an equally specific involvement in the mission of the Church" (Cook & Hudson, 2003 p. 5). The current situation threatens the religiosity of Catholic high schools. This is all supported by O'Keefe (2008) who believes that Catholic schools in the United States are in crisis and recognises that the number of priests, nuns, and brothers working in the schools has plummeted, resulting in principals hiring lay teachers and principals at competitive salaries.

It is now the responsibility of laypeople in Catholic schools to uphold the Catholic educational tradition. A fundamental consideration of *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) is the need to appoint committed Catholics to the critical role of middle and senior leadership. Middle

school leaders in Catholic schools are expected to have a sufficient understanding of the Church that is consistent with the Church's teachings. The purpose of this study is to explore how middle leaders in Catholic secondary schools view their role as religious leaders.

Due to the shifting makeup of the teaching pool, as well as several technological and sociological variables, middle leaders' duties and expectations have altered (Hutton, 2002). Mulford (2006) concludes that finding the next generation to replace those who will soon retire will be challenging, not only because of demographic trends, but also because some recognise the pressures placed on leadership. This was supported by the study of Wilkin (2019) when researching the aspiration of the next generation of Catholic school leaders. Leadership transition and succession have been identified by educational organisations working to improve their schools as a crucial need in organising, preparing, and transforming their systems (Fink, 2010; Leithwood et al., 2008). In the Catholic context, this is even more important as there are not only heightened administrative and role expectations but also those of an ecclesial nature. Formation and ecclesial preparation for leadership is necessary.

1.2.5. Changing demographics – the Australian context

The changing trends and demographics of Catholic education were best described several years ago as being "at a crossroads", which was clearly stated by the Bishops of New South Wales and the Australian Capital Territory (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007). This document suggested that the changing demographics of the workforce, if not adequately addressed, would result in a growing division from the Church. The workforce in Australian Catholic schools is changing and generational leadership succession is plaguing the Australian educational system. (Fink, 2011; Marks & Printy, 2003). The Australian Bureau of Statistics (2016) reported that the education and training industry has the highest percentage of people planning to retire in the decade following the report. This is not a new phenomenon, as the leadership crisis in the 1970s and 1980s was already focused

on the declining number of religious clergy and there was a need to adjust towards greater reliance on lay leadership (Belmonte et al., 2006).

Dixon (2017), in a demographic study of the Church today, asserts that current dramatic changes within the Church can be expected to continue in the future. He projects that worship attendance will continue to decline, priest numbers will continue to decrease, and the presence of religious brothers and sisters will be negligible (Dixon, 2017). Sheridan (2017) posits that Australia is becoming an atheist nation and describes this phenomenon as an eclipse of Christianity. In addition to these demographic changes, the impact from the Royal Commission into *Institutional Responses to Child Sexual Abuse*, alongside the public discussion on a range of social phenomena, including same-sex relationships (Sheridan, 2017), adds weight to this shift away from Christianity. While this view causes a great deal of discomfort in the context of Catholic education, it raises questions and invites discussion about what will replace the once dominant voice of the Catholic religious tradition.

The most available recent Australian census (2021) shows that Christianity as a percentage of the population has fallen to 43.9 per cent, down from 88 per cent in 1966. Within the broader Australian community, Catholics now make up only 20 per cent of the population, compared to 22.6 per cent of the population in 2016 and 25.3 per cent in 2011. Overall, approximately 61 per cent of Australians reported having some connection to a religion. But alarmingly, for this study's objectives, the number of people who reported "no religion" increased to 38.9 per cent in 2021 compared to 30.1 per cent in 2016 and 22.3 per cent in 2011. The picture that emerges supports the earlier views of Sheridan (2017) of a demonstrable disengagement from religion and affiliation with religious beliefs. Attendance at religious services, for example, was reported at 12 per cent of the total population in 2016 (ABS) and the Congregation for Catholic Education (2020) claims this will fall to around 5 per cent by 2030. This raises significant concerns regarding the reasons behind parents enrolling their children in Catholic schools at a time when religious identity is on the decline.

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Undoubtedly, several factors influence why parents select Catholic schools that have nothing to do with their religious identity. Rymarz (2012) speaks of vicarious religion, which offers us an understanding of the changing religious landscape in the Australian context. Davie (as cited in Rymarz, 2012) highlights the paradox of religion in modern culture, where participation in Church rituals is dwindling yet weak religious attachment is still appealing. In reality, multiculturalism and secularism in Australia have increased the proportion of students enrolled in Catholic schools who are not Catholic or do not frequently attend Catholic parishes (Queensland Catholic Education Commission, 2008). This is recognised by the Catholic Education Office of Melbourne (2011) as both a blessing and a challenge from a growing diversity of cultures and faiths. We see here that the pendulum swings in one direction when it comes to connection to the Church, but it swings in the opposite direction when it comes to participation in a religious school and specifically, in relation to this study, the role of the parish and the parish's connection to the Catholic secondary school.

Australian students and their parents see the Catholic school as a replacement for the parish as a separate ecclesial entity (Engebretson, 2008; Griffiths & McLaughlin, 1999; Quillinan, 2002). The link that historically connected families, parish and school is no longer present. "The local parish community has lost its relevance to the majority of parents and pupils in Catholic schools and has effectively become the normative faith community" (Watkins, 1997, p. 79). Most parents and students, it is claimed, only interact with the Catholic Church in Catholic schools (Griffiths & McLaughlin, 1999; Hansen, 2000, 2001).

1.2.6. The parish divide

There is limited research into the difference between Catholic secondary and primary schools and how they relate to the parish. The relationship and role between parish and school is of interest to this study, as the school is seen as a main arm of the Church and middle leaders within the school have ecclesial responsibilities.

The Bishops of NSW and ACT articulated an ecclesial perspective on schools in their pastoral letter *Catholic Schools at a Crossroads* (2007), which called for all in Catholic schools to engage in the re-founding and reworking of the Catholic school, along with encouraging active participation from all Catholic school teachers. The Bishops described "the surrounding culture and its powerful agendas such as the media and new technologies" as less encouraging (p.6) and that "society-wide trends such as secularisation, consumerism, family dysfunction and value disorientation are also impacting young people" (2007 p.8). It was clear that the Bishops considered the school's mission as one of harm reduction and rehabilitation rather than urging participation via discernment and dialogue. The difference between Catholic primary and secondary schools is demonstrable here by the fact that many secondary schools, unlike their primary counterparts, are not parochial.

There is an expectation within Sydney Catholic schools that the parish and the school be connected administratively. The Archbishop's Charter (2015) states that "Catholic schools have a unique role in the evangelising and educating mission of the Church" (p. 1). The mission and goals of Catholic schools in the Archdiocese of Sydney are outlined in this Charter for Catholic Schools. It indicates that leaders in the school "work with Parish Priests to nurture communities where the celebration of the Eucharist, the sacraments, Sacred Scripture, prayer and Catholic symbols support students in developing a personal relationship with Jesus" (Catholic Education Office, 2015, n. 9).

The work between schools and parishes is challenging, and this challenge is especially clear in how clergy view Catholic schools. The research of Bezzina (1994) notes that "clergy expressed significant concerns about the faith commitment of teachers and in particular secondary school teachers. They saw this reflected in the lack of participation in school prayer and parish life" (p. 4). Tinsey (1998) cites views that secondary schools are not seen by clergy as being "in partnership with the local Church community" (p. 159). Additionally, Tinsey draws the conclusion that secondary schools are less effective than primary schools and that

secondary teachers lack sufficient religious motivation for their work; clergy and secondary teachers have inadequate communication; and secondary teachers and clergy have different ideas of the Catholic school's purpose and mission. Whilst the study of Tinsey (1998) is dated and is limited to one region in New South Wales, it is of relevance to this study as it underscores the ongoing tension and potential rift between the parish and the school.

Tinsey's study in the Diocese of Lismore in 1998 reveals a critical separation inside the local Church, a friction that has an impact on the ability of the principal and parish priest to collaborate. This is further supported by the work of Belmonte et al. (2006) which found that "there is general confusion about the precise nature of the relationship between the lay principal and the local Church, suggesting that there is little evidence of a working relationship between principals and priests" (p. 10). If this is true of school leaders, then questions can be asked about the relationship between the middle leaders and the Church, what role the Church plays within the school, and how the Church supports the evangelising mission and purpose of the school to help the leaders fulfil their Church responsibilities.

In the context of this study, the number of Parish Priests has declined, and with an ageing priesthood, secondary schools have less parochial leadership (however fractured) to fall back on. Most primary schools are located on parish grounds, although many Catholic secondary schools are not. As a result, research shows that Catholic leaders are already filling a void in ecclesial leadership in education. (Belmonte et al., 2006). This is, of course, in addition to all the other responsibilities and accountabilities of school leadership.

1.2.7. Formation for mission and ecclesial preparation for leadership

To build effective leadership, quality teaching and professional learning schools need the support of a system (Mourshed et al., 2010). Even though the effect of leadership on student outcomes is considered to be indirect, it has been reported that 'school leadership is second only to classroom teaching as an influence on student outcomes' (Leithwood, Harris, & Hopkins,

2008, p.27). Marzano, Waters and McNulty (2005) identified being optimistic and intellectually stimulating; being a change agent; and being able to evaluate and provide feedback, exercise flexibility and articulate clear ideals and beliefs as the most influential leadership traits. This suggests that "the closer leaders are to the core business of teaching and learning, the more they are likely to make a difference to students" (Robinson et al., 2007 p.21). The same leadership principles that apply to improving student outcomes might also apply to leading mission and religious formation. For this reason there needs to be coherence between generic leadership competencies and specific competencies to lead mission and formation in Catholic schools.

Recently, Archbishop Anthony Fisher OP wrote of formation as being an immediate and future priority for mission in the Catholic school. "As we step forward into the next 200 years of Catholic education [in Australia] I invite all of those involved to embrace formation for mission. It is essential that leaders and staff understand and are solidly committed to the Catholic identity of the school" (Fisher, 2022, p. 4). The continuing cultivation and preservation of lay teachers' spirituality in Catholic schools could be viewed as formation for mission. The Church has accepted that being a teacher in a Catholic school is a calling that is essential to the Church's mission (Congregation for Catholic Education, 1982; Congregation of Catholic Education, 1998; John Paul II, 2001). A number of researchers and authors have identified ongoing formation as vitally important to sustaining, nurturing and renewing the vocation of teachers (Groome, 1998; McMahon, 2003; Palmer, 1998; Simone, 2004). Given the environment in which Catholic schools operate, adequate formation for mission is essential for future leadership.

The international, national and integrative nature of formation within Catholic education is abundantly clear from multiple sources (Sultmann et al., 2022). Formation for mission of all in a Catholic school community, according to a current understanding applicable for this enquiry, is Christ-centred:

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it is an intentional, ongoing and reflective process that focuses on the growth of individuals and communities from their lived experiences, in spiritual awareness, theological understanding, vocational motivation and capabilities for mission and service in the Church and the world (National Catholic Education Commission (NCEC), 2016, p. 9).

Given the variety of backgrounds, experiences and openness of middle leaders to participate in continuing education opportunities, significant challenges arise. It is now primarily the role of lay leaders to lead Catholic culture in schools, and the necessity for intentional, continuing and reflective formation programs is clear. (National Catholic Education Commission (NCEC), 2016; Rymarz, 2004; Rymarz, 2010).

The vocation of lay ministry and leadership is supported "at the highest levels" of the Catholic Church due to a "deepening understanding of the role and ministry of laity within the Church, at theological and canonical levels" (Pope John Paul II, 1992). Lay formation must be situated in the context of the life and work of lay people. Beyond the initial revelation of recruiting, a lay teacher's calling to work in a Catholic school is both personal and communal (Mahan, 2002) that initially draws the individual to teach.

This continuing conception of vocation suggests that formation must be influenced by knowledge of and appreciation for the continual process of developing one's faith (Fowler, 2000; Levinson, 1996). Little attention has been given to the formation of middle leaders to prepare them for their leadership roles. Given the role that middle leaders play in schools and the fact that their work is integral to the mission of the Church, exploration of formation for mission for middle leadership is both warranted and overdue.

1.2.8. Organisational dynamics that influence Catholic leaders

Importantly, there is recognition of the Catholic school system's functional organisational features, continual effort to renew itself in response to the signs of the times, unique emphasis on religious education, and the religious dimension of its mission. To fully articulate the

Christian life in ecclesiological, theological, and organisational forms is a call to leadership, and for the purposes of this research, specifically middle leadership. The benefit of ministering together is as important as the service provided, and leadership processes that promote connectedness and shared responsibility recognise this. Duncan (1990) emphasised a variety of academic fields crucial to leadership in Catholic schools, including learning (child development and adult education), the faith component (spirituality, prayer, and theology), and organisational approaches (organisational theory and development, leadership and administration).

Strategic conceptualisation of the breadth of leadership activity, especially for individuals in designated leadership positions, can be done in terms of key domains and related key result areas (Sultmann and McLaughlin, 2000). Leadership in four generic domains: oneself, interpersonal interactions, organisational operations, and management systems. The research of Sultmann and McLaughlin (2000) identifies a wide range of influences that leadership can address, and it especially recognises the Catholic school as the setting for leadership. The spirit of empowerment can be observed in organisational life when power and responsibility are distributed in ways that respect people's individual talents and drive for growth. Under such a strategy, staff independence, self-regulation, and responsibility take the place of directive and regulating methods (Wheatley, 1992). In this way, the Catholic school demonstrates the virtues of strong organisational frameworks and procedural practises while depending on an understanding of the person and teachings of Christ, from whom the vision derives. This attention to systems that support structure and rigour in mission organisation is communicated by the integrating principle of organisational systems.

1.2.9. Personal context

The researcher has worked in senior positions in a number of Diocesan Catholic schools. Prior to these experiences, the researcher was also a senior staff member in an independent

boys' Catholic school. In addition to these teaching positions, the researcher has also held positions in Catholic charities working with marginalised youth. Through these areas of professional life, the researcher has developed an interest in the mission of the Church and the role of those who lead in Catholic organisations.

The researcher has always been fascinated by the multidimensional role that such leaders play. While enjoying certification for teaching Religious Education in the Sydney Archdiocese as part of his undergraduate studies and having the opportunity to lead in Catholic schools in the same Archdiocese through postgraduate qualifications in Catholic leadership, the researcher has developed a keen interest in the formation opportunities offered to middle leaders and their perceptions of such opportunities.

1.2.10. Context summary

Catholic school middle leaders are expected to have a sufficient ecclesial understanding that is consistent with that of the Church. Such expectations must be translated into concrete practices within the school and within the parish by the school leadership – especially the middle leadership. In reality, Catholic school's middle leaders may not be equipped educationally, pastorally or religiously to carry out these roles.

Societal changes, the decline of religious clergy, and the changing demographics of students and staff in Catholic schools – along with the relationship with the parish – need to be seen in the context of ecclesial expectations of school leaders as outlined in *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007). The educational, pastoral and evangelising roles of Catholic school middle leaders within such a context have created the need for new guidelines for formation for mission. It can be stated, then, that there is a need to address the process for formation in direct response to the changing demographics outlined above.

Like all schools, the Australian Catholic secondary school is influenced by the social, cultural, educational and religious factors of the society in which it operates (D'Orsa & D'Orsa, 2011). When considering how middle leaders are influenced by educational opportunities, one must also consider how these same middle leaders are influenced by the Church in a more general sense. The Church is in a generational transition. This view is juxtaposed with data and research showing that overall worship attendance in Australia is declining, with declines seen in all age groups under 75 (Australian Bureau of Statistics, 2016; Dixon et al., 2007; Wilkinson, 2011). Of even greater concern to the Church is the large number of people who no longer identify as Catholic. There is a clear danger here of a disconnect between those in authority and what is expected of them if the community they seek to serve no longer sees the relevance of the Church or even of attending mass.

The research project *Catholics who have Stopped Attending Mass* shows that more than half of those who did not attend mass gave as their reason that a committed Catholic no longer felt the need to attend mass frequently (Dixon et al., 2007). The traditional patterns of formation for mission, and especially for middle leaders in Catholic schools, can no longer be assumed. Just as the Church is a living organisation that has undergone and is undergoing significant change, so too does the formation for mission of middle leaders.

1.3. The nature of the problem

Catholic Schools at a Crossroads, a pastoral letter from the Bishops of NSW and the ACT, issued a challenge to educational leaders and staff to "dedicate themselves to ensuring that our schools are truly Catholic in their identity and life, that they are centres of the 'new evangelisation', that they enable our students to achieve high levels of religious literacy, and that they are led and staffed by people who contribute to these goals" (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007, p. 3).

The Bishops (2007) in their pastoral letter suggest that middle leaders in Catholic schools ought to have sufficient ecclesial understanding to engage in the evangelising mission of the Church that is congruent with that of the Church. *Catholic Schools at a Crossroads* explicitly states that "leaders and staff understand and are firmly committed to the Catholic identity of the school" (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007, p. 10). The issue underlying this research concerns the degree of congruence – or possibly the lack thereof – between Church and middle leadership expectations of the role of leaders with the evangelising mission of Catholic education despite the programs and policies of formation. While the new evangelisation's emphases can take root within the Catholic school's ministry, it can no longer be assumed that religious traditions are passed down automatically and easily from one generation to the next, and it can no longer be expected that all educators and students in Catholic schools are engaged in, or will engage in, the formation of their organisational identity as Catholics (Sultmann et al., 2022). Religious formation derives an almost natural connection with the vocation and profession of teaching in a Catholic school. The mission of the Church, the resulting role of the Catholic school in that mission and the faith life of those involved in the school – all in the context of contemporary Australia – emerge as critical elements in the ongoing formation of middle leaders.

Given the ecclesial expectations of middle leaders, the important role they play in ensuring the Catholicity of the school and the formation they receive is critical. According to Wilkin (2019), the role of middle leaders is becoming more difficult since it entails attempting to interpret and exemplify the Gospel message in a way that is "relevant not only for their school as a whole, but also on a very detailed, daily basis" (p. 124). This presents a challenge given the reality that many students are either unaware of or, in some cases, oppose Catholic traditions. This study provides a framework for how middle leaders experience formation for

mission and suggests new policy initiatives for middle leader formation for which there is little research in the literature.

1.4. The purpose of the research

The purpose of this research study is to examine how middle leaders in Catholic secondary schools perceive their role as faith leaders and to understand how formation for mission might better prepare them to fulfil their ecclesial responsibilities.

1.5. The significance of the research

This study is important for three reasons:

Firstly, the Catholic Church acknowledges the transition of Catholic school leadership from religious to secular. The account of how middle leaders perceive and experience formation for mission may help authorities better prepare middle leaders for leadership.

Secondly, this study is significant because it not only gives middle leaders, through the lens of this study, a voice in the formation for mission they are afforded and experience, but also provides a framework for how middle leaders experience formation for mission and how new policy initiatives for formation and accreditation for teaching and leadership better prepare middle leaders for leadership.

Finally, Church leaders and Catholic education administrators will find the research findings relevant as they review, propose and formulate processes to ensure that Catholic schools remain authentically Catholic. This study will contribute to existing research on middle leader formation policies in Catholic secondary schools. Currently, there is no in-depth research on how middle leaders perceive and experience the current demands and expectations of formation for mission opportunities.

1.6. Research questions

The research question that will focus the implementation of the research design is: What is the nature and aspects of religious formation provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school? The following related sub-questions have been developed as a result of the research question's insights from the literature:

RSQ1 What are the ecclesial expectations of school leaders in general and middle leadership in particular?

RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?

RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

1.7. Thesis structure

The research is divided into six chapters.

Chapter 1 outlines the context and scope of the research problem. This chapter explores the ecclesial identity and purpose of Catholic education, along with an examination of the role of teaching, a changing landscape in terms of demographics and parish involvement, and the need for formation for mission and purpose. The nature of the problem, the purpose and significance of the research, and the overall structure of the work are outlined.

Chapter 2 provides a review of the literature and provides a foundation for developing the research questions. For the purpose of this study, "faith life" is considered an important

issue given the reality of staff in Catholic schools who have been shown to be increasingly distanced from the Church, and the non-practicing tendencies among many self-declared Catholics. Much has been written about teachers' faith lives and their adherence to the Catholic way of life. A question worth exploring further is: to what extent are young Catholics aware of their role as bricoleurs and to what extent are they consciously constructing an identity, as opposed to simply rejecting the elements of Catholicism that no longer appeal? The literature also examines middle leadership in Catholic secondary schools and the important role middle leaders play in the evangelising mission of the school. Religious formation for mission within Catholic education is examined in the secular and pluralistic world in which Catholic schools are located.

In Chapter 3, the methodology used to answer the research topic is described. An interpretative mixed-methods approach was adopted, incorporating both quantitative and qualitative research methods to analyse and sort the data. Chapter 3 describes in detail the epistemology, theoretical framework and methodology used in this study. The methods of data collection are discussed as well as issues of verification, ethics and limitations of the design of this research.

The data analysis and subsequent conclusions, as well as a discussion of the synthesised data, are presented in Chapters 4 and 5. The information is organised around topics emerging in the literature and directed by the research questions.

Finally, Chapter 6 outlines an overview of the study, the conclusions of the study, and limitations. Recommendations are then given, as well as recommendations for additional study and research.

Chapter 2: Literature Review

2.1. Introduction

The nature of lay leadership in carrying out the Church's mission is a major theme of this review, as evangelisation – the core mission of the Church – can be seen as an expression of self, teacher and leader. This research explores middle leaders in Catholic secondary schools and how they perceive their role as leaders in faith, as well as if they believe they are appropriately prepared to lead this part of school life. This chapter reviews literature relevant to the research problem identifying the key themes and providing a critical analysis of the emerging themes for further enquiry through the development of sub-questions. Founded on an initial review of formation and lay Catholic leadership, this review elucidates the discourses that emerge from the literature on faith leadership and formation for mission for middle leadership in Catholic secondary schools. These themes need to be contextualised within an ever-changing society.

How these themes come together conceptually is illustrated in Figure 1. The significance of these themes and sub-themes for the research questions of this study will be considered throughout the literature review. The evangelising mission of the Church has a central position within the framework. Middle leaders' formation for mission and formation experiences in Catholic secondary schools play an important part in the Church's evangelising mission and, as a result, in establishing the identity, ethos and climate of Catholicism in Catholic schools.

Figure 1

Conceptual framework
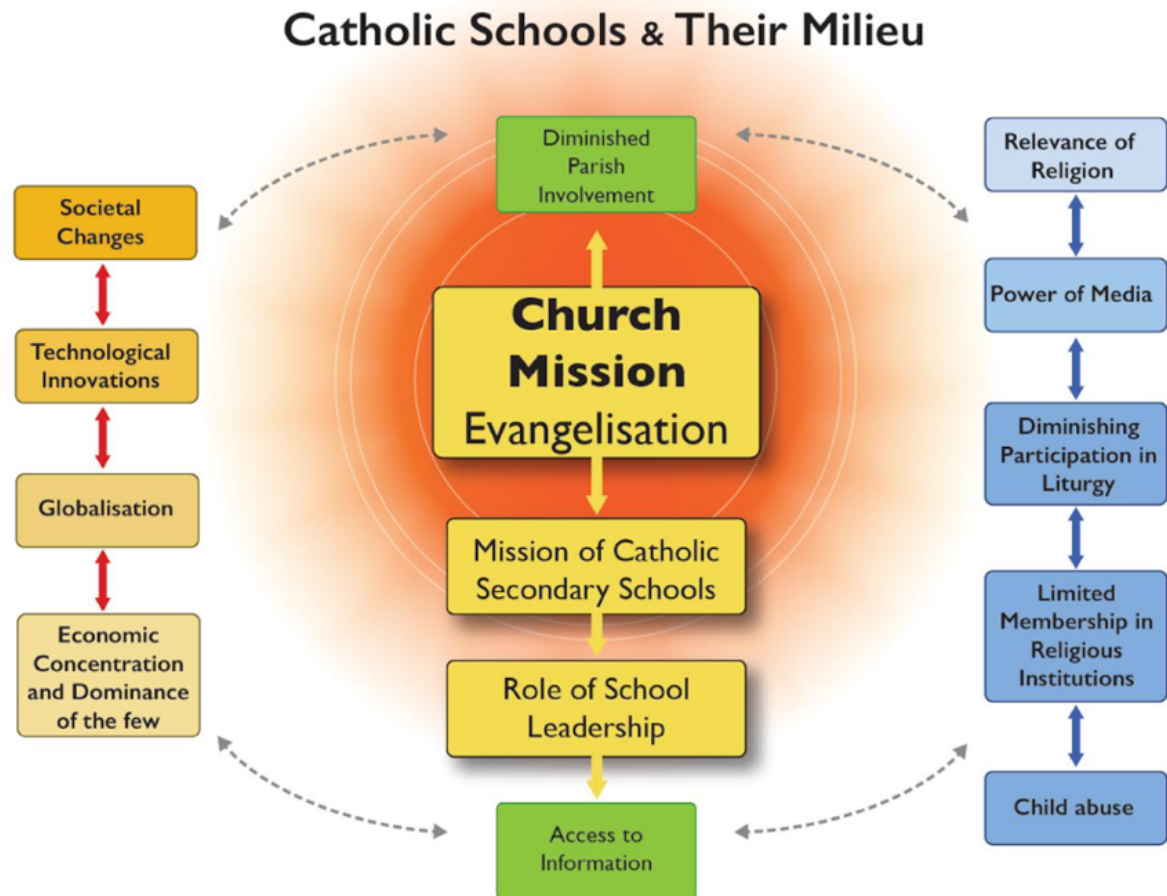
Figure 1 represents Catholic schools and their milieu. The secondary Catholic school's mission is to evangelise, which is the Church's mission. This study highlights the important role that school leadership plays in realising that mission and, in particular, the role of middle leadership. It is set amidst societal changes, technological innovations and globalisation, as well as the economic concentration and dominance of a few. The resultant access to information dictates and asks questions about the relevance of religion, the power of media, diminishing participation in liturgy, limited membership in religious institutions and the reality (and subsequent fallout) relating to child abuse within the Church. This also needs to be contextualised with diminishing parish involvement. This milieu poses challenges for leaders in Catholic schools as they are expected to evangelise and ensure religious literacy of students along with their academic and pastoral work. Middle leaders are asked to be "new

Chapter 2: Literature Review

evangelists" who may "proclaim and spread" the Gospel message, and they must actively promote the school's Catholic mission and identity (Pontifical Council for Promoting New Evangelization, 2020, p. 31). Middle leaders need assistance with this, which comes by the way of formation for mission. The focus of this study is on that formation for mission for middle leadership in Catholic secondary schools.

The attitudes and values that serve as the foundation for school policy and action are influenced by middle leaders. The execution and experience of formation are impacted by society and culture, according to the literature. The society in which the Church and the Catholic school operate, changes. Globalisation, individualism, pluralism and secularisation, as well as individual struggles with identity and meaning, characterise contemporary society. The role of an educator in Catholic schools is affirmed by Pope Francis (2014):

> the educator in Catholic schools must be, first and foremost, competent and qualified but, at the same time, someone who is rich in humanity and capable of being with young people in a style of pedagogy that helps promote their human and spiritual growth. (para. 6)

Pope Francis highlights the significance and challenge for formation in relation to the nature of the mission of the Catholic school today (2014). Religious formation is integrally tied to the vocation and profession of teaching and leading in a Catholic school. As a result, the mission of lay educators, the concept of leadership and the function of middle leadership are all investigated. The Church's evangelising mission, the Catholic school's subsequent role in that mission and the faith lives of individuals involved in the school – all situated in the context of post-modern Australia – emerge as essential aspects in middle leaders' ongoing formation for mission. This provides a framework for how middle leaders perceive their role as leaders in faith, and the extent to which they feel adequately prepared for such leadership in Catholic secondary schools, for which limited research has been noted in the literature.

2.2. Leadership in faith in an educational context

Nemo dat quod non habet – you cannot share with others what you do not have yourself.

2.2.1. Faith

Faith-based schools have been described as a modern-day phenomenon (Johnson, 2005). Many countries' educational systems depend on faith-based institutions, which teach a sizable portion of their students (Arthur, 2005; Sullivan, 2006b). Despite the importance of leadership in schools and the growth of faith-based schools, research in educational leadership has tended to ignore them (Grace, 2002, 2009). Faith leadership at a faith-based school is difficult because, in comparison to state schools, faith-based school leaders are expected to meet wider demands from their local communities (Fincham, 2010; Shah, 2012; Sullivan, 2006b). Middle leaders in general, and middle leaders in Catholic schools in particular, appear to lack sufficient knowledge on how to manage these increased responsibilities, according to contemporary theoretical models of leadership (Stern & Buchanan, 2020). However, understanding the concept of faith is necessary before contemplating the complexities of faith-based leadership in the context of a faith-based school.

Faith is a difficult notion to quantify, and the term is used in a myriad of ways throughout the literature. Tillich (1957) observes, "there is hardly a word in the religious language, both theologically and popular, which is subject to more misunderstanding, distortion and questionable definitions than the word faith" (p. ix). The classic understanding of faith is epitomised in the work of James Fowler (1996) who asserts that "Faith is a dynamic, evolving pattern of the ways our souls find and make meanings for our lives" (p. 21). Fowler writes that faith, not belief or religion, is a basic fundamental category in humanity's quest for relationship to transcendence. He calls faith a generic, universal feature of human existence that is known everywhere, regardless of the many forms of religious

practice that exist. Fowler acknowledges that for every major religion studied, each addresses faith in some manner that explains the visible phenomenon.

Faith has traditionally been defined by theorists as believing in a supreme being, but many contemporary researchers prefer a broader definition of faith that reflects the phenomenon's complexity. Borg (2003), for instance, offers four definitions of faith: "assensus (mental assent to belief); fidelitas (faithfulness to God); fiducia (trust in God), and visio (a way of seeing the whole)" (pp. 34–37). According to Borg, "assensus is a more traditional paradigm of faith with its roots in the Reformation and the critical need for denominational differentiation on the basis of belief" (p. 37). Faith has two different meanings: "relational" (p. 61) and to "emphasise a relationship to God that is not constrained by the rigidity of credal assertions but is transformational" (p. 61). These "emerging paradigms of religious faith", according to Borg (p. 61), are a reaction to the signs of the times and increasingly difficult circumstances, as Christianity experiences friction within a backdrop of secularisation and religious belief marginalisation. If one is to comprehend the current context of faith leadership in a modern setting, Borg (2003) claims that a transformational and changing concept of faith is required.

It is this emerging understanding and view of faith that influences leadership in faith. Within this contemporary setting and responding to the signs of the time as asserted by Borg (2003), King and Crowther (2004) suggest a "degree of ambivalence and neglect" (p. 83) as a result of growing secularism within Western culture. As a result, "religion has been consigned to the privatized sphere" (Herbert, 2003, p. 52) and is frequently regarded as being of little value in Western cultural and social life (Grace, 2002). If the concept of faith is now neglected, as King and Crowther (2004) suggest, then how one both expresses and understands their faith is challenged. This can be seen as particularly challenging for teachers and school leaders where faith can be seen as central in a faith-based school. This has clear implications for those teaching and leading in such schools.

Not only is faith difficult to define (Tillich, 1957) but also difficult to measure. If faith is active, it must be lived and witnessed, seen and expressed. Westerhoff (2000) believes that faith is experienced not only in structured education within schools but in the life of the congregation, a process he calls "religious socialization" (p. 13). Schipani (1997) also believes that faith is more than knowledge of creeds and doctrines and that "Christian faith must be viewed as committed participation in God's liberating and recreating work for the sake of the world" (p. 295). He goes further by saying that "Faith is thus a practical way of life conceived in terms of commitment, following, doing, and action, that is, discipleship oriented to the realization of God's utopia of shalom" (Schipani, 1997, p. 297). Faith entails not only putting beliefs into actions, but also acting to bring about justice and peace in the world. Faith can be viewed as a way of life in this sense. Christian faith – that is, faith centred on Jesus Christ – can be viewed as developmental, manifesting itself in discipleship (mission) and understanding growth. Hellwig (1993) describes this as:

> because circumstances vary and situations change, discipleship of Jesus requires more than following a set of explicit instructions. It involves willingness to learn from one's own contemporary experience, and to grow into progressively deeper understanding of the meaning and demands of the Gospel. (p. 38)

Faith relationships connect students to the Church, and these life relationships encourage the creation of the full person – social, academic and religious – according to the research of Gleeson et al. (2008) on teacher identity. This concept of faith as discipleship is integral to this study, as teachers and middle leaders play an integral role in shaping the discourse within the school. Educating people for a living faith, as a way of life, "is an ontological enterprise that is to inform, form and transform people in heads, hearts and life-styles; it is to engage nothing less than the marrow bone" (Groome, 1991, p. 21). Teachers and middle leaders need to be formed in their own faith themselves before they can then engage in the faith development of others – *Nemo dat quod non habet* (you cannot share with

others what you do not have yourself). Faith-based schools face a difficult task in forming students in this living faith.

2.2.1.1. The vocation of teaching

This challenge, within the faith-based schooling context, rests with those staff who have taken up the vocation of teaching. Education is a mindset and a way of being; to educate, one must put themselves aside and be with children, walking alongside them as they go through different stages of development (Sultmann et al., 2022). Sultmann (2018) explores the relationship between teaching and vocation, where teaching represents vocation as participating in Christ's ministry within a Catholic faith community, in contrast to teaching, which is the professional response carrying the profession's requirements, vocation refers to the call to teach in accordance with the expectations of the organisation. Every teacher in the Catholic school community is called to ministry because they contribute to the school's religious life via witness, involvement and action (Sultmann & Brown, 2019). Teachers are called to be witnesses to what they communicate when they use their words to pass on information and beliefs. Pope Francis (2013a) reminds us of the significance of a teacher's words if they are complemented by their example and style of life.

For the purpose this study, the term *vocation* has been used in both religious and secular settings to describe the concept of vocation for laymen and women in Catholic schools. The word derives from the Latin 'vocare', which means to call. It is this vocation that Rymarz (2010) contends is critical to the religious identity of the school. According to Rymarz (2010), numerous authoritative Church publications have stated that the witness presented by competent, profoundly religious and committed teachers is an irreplaceable aspect in Catholic schools. The Catholic school on the threshold of the third millennium put it in these terms:

in the Catholic School, prime responsibility for creating this unique Christian

school climate rests with the teachers, as individuals and as a community.

Teaching has an extraordinary moral depth … we must remember that teachers

and educators fulfil a specific Christian vocation and share an equally specific

participation in the mission of the Church, to the extent that it depends chiefly

on them whether the Catholic school achieves its purpose. (Congregation for

Catholic Education, 1997)

This emphasises how significant, if not critical, teachers are to the school's religious character

(Rymarz, 2010). With the fall of religious personnel and the growth of lay staff, this relevance

has become even more pronounced.

The historical evolution of the role of the teacher as a lay person working to realise the

Catholic school's mission was highlighted when the Christian Brothers Education Association

conducted its 19th annual conference in 1958, where the focus was "the lay teacher in

Christian Brothers' High Schools", which emphasised the importance of lay teachers having a

complete Christian preparation for their ministry as teachers (Tidd, 2009). The Brother

Superior General of the time described the favourable benefits of lay teachers in Brothers'

schools in a letter to conference in the following way:

we religious have to realise that lay teachers have come into our schools to

stay, and that we owe them a debt of gratitude for their admirable spirit of

cooperation and for the enlightened zeal they manifest in the cause of Christian

education … we appreciate the fact that most of the laymen who work at our

side have come, particularly in recent years, to look upon their teaching career

as a God given vocation … we have often witnessed the deep impression made

upon the minds of our pupils through their contact with earnest Catholic

laymen who so obviously put spiritual values to the forefront of their lives. It is

true, of course that these pupils have the inspiring example of the Brothers ever

before them, but what they learn to take for granted in a religious usually

appears more striking in one of themselves. (Phillips and Ignatius, in Tidd,

2009)

The idea of the deep impression that lay men and women hold upon the minds of their pupils was further developed in *Lay Catholics in Schools: Witnesses to Faith* (Congregation for Catholic Education, 1982). This study acknowledged the significance of non-religious women and men teaching in Catholic schools and defined their individual vocation in the Church as "complementing the past and present work of those religious" (para. 37). It clarifies the concept of teaching as a "ecclesial vocation" for lay people (para. 43), in the Church's mission, coexisting with priests and religious.

> The Lay Catholic educator ... exercises a specific mission within the Church by living, in faith, a secular vocation in the communitarian structure of the school: with the best possible professional qualifications, with an apostolic intention inspired by faith, for the integral formation of the human person, in a communication of culture, in an exercise of that pedagogy which will give emphasis to direct and personal contact with students, giving spiritual inspiration to the educational community of which he or she is a member. (Congregation for Catholic Education, 1982, para. 24)

This specific mission of the lay educator, as outlined in *Lay Catholics in Schools* (1982), and the spiritual inspiration they both possess and embody, places significant responsibility upon them. In an analysis of Church documents, Shimabukuro (2004) found that "at its most fundamental level, Catholic school teaching consists of sharing one's faith with students, while concurrently deepening one's own faith" (p. 139). This highlights that the vocation of teaching is significant, and is even *more* significant in a Catholic school where the school is the "principal educational arm of Catholic families, parishes and the wider Church" (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007, p. 10). When the role of teaching in Catholic schools is examined through this lens, it becomes clear that Catholic schools were established to promote the Church's evangelising purpose (Groome, 1996); they are seen by many Catholics, both lay and clerical, as sharing in the story and the vision of the Church's tradition and mission, and that the mission is indeed God (Bevans, 2009). According to Rymarz (2010) the religious character of Catholic schools is

largely determined by the people who work there, and a number of Church scriptures have indicated that a necessary factor in Catholic schools is the witness of competent, deeply religious and committed teachers.

2.2.1.2. Faith life of teachers

The problem underpinning this research indicates that, despite considerable attempts by the Church and financial expense, the faith life of teachers may not be reflected in their everyday life. Convey (2010) propose that in order to effectively contribute to the objectives of the Catholic school in both academics and faith development, teachers must understand their role, be sufficiently motivated, and be content with their work. *The Catholic School on the Threshold of the Third Millennium* (Congregation for Catholic Education, 1997) underlines the Catholic school's evangelising role and emphasises the mission of the Catholic school in relation to moral and religious dimensions of human growth. "A school is ... a privileged place in which, through a living encounter with a cultural inheritance, integral formation occurs" (Congregation for Catholic Education, 1977 para. 26). This expectation places a great deal of duty on those who teach, work and lead in a Catholic school and contributes to their pupils' academic and faith formation. It is for this reason that Fisichella and Arenas assert that formation "is required so that teachers be believers committed to personal growth in faith, incorporated into a Christian community, desirous of giving the reason for their faith through their professional expertise as well" (2020, n. 318).

The effectiveness of a Catholic school depends heavily on the teachers' commitment to their faith. Convey's research (2010) highlights the religious component of teaching in a Catholic school and the need for Catholic school administrators to engage teachers who are committed to upholding the mission of Catholic schools. While Convey's study confirms that teachers who choose to work in Catholic schools do so for religious reasons, and this, in turn, is an important predictor of job satisfaction, it also highlights the tension that arises from the

difficulty in determining who understands and who does not understand the Church's mission; it is difficult to measure one's understanding of mission. The expectations regarding the faith life of teachers "constructs an ideal model of the lay Catholic educator which is daunting in its expectations" (Grace, 2002, p. 20). It's both an acknowledgement and a challenge to the lay presence in Catholic schools.

While religious motivations for teachers who want to teach in Catholic schools must be investigated (Convey, 2010), the most frequent justification for teachers applying for jobs (Guarino et al., cited in Plunkett & Dyson, 2011, p. 38) was the "ethos – religious/special needs/culture of the school". Teachers must support the school's ethos and principles as part of their contractual employment agreement to teach at a Catholic school. They agree to and are expected to "nourish personal spirituality as well as to state the religious aspirations of the school as a type of community of faith sponsored by the Catholic Church" (Crawford & Rossiter, 2006, p. 435). However, notwithstanding the importance of faith, "teachers do not expect the school, or its Catholic ethos, to encroach too much on their personal lives" (Hughes, 2008, p. 39). Cho (2012) shows that most Catholic teachers whom he surveyed in the United States thought that faith was important in their lives. Of the 594 Catholic teacher respondents, only a half indicated that religious motives were behind their reason to teach in a Catholic school. Cho (2012) also determines that, in comparison to non-Catholic teachers, the most important aspects impacting Catholic teachers' choices to work in their current Catholic schools were directly related to their faith. From the teacher's perspective, this study showed the importance of faith.

Within the Catholic school context, much is made of the faith life of teachers and their adherence to the Catholic way of life. The significance of this is highlighted when considered against the backdrop of the faith life of other members in the community. According to McLaughlin (2005b), most parents who enrol their children in Catholic schools are either

non-Catholics or do not practise Catholicism. It is in this context that Rymarz (2012) contends that, for those who do remain Catholic, they do so on their own terms.

Faith and the faith life of those within the Catholic school are important themes for the purpose of this study and reflecting on the research question, as it is worthwhile to investigate the reality of lay staff in Catholic schools where evidence indicates a growing distance from the ecclesial Church. McLaughlin (2002) potentially sums up the relevance of faith and faith life when he suggests that the "vast majority of [Catholic educators] have reservations about the contemporary Catholic Church and, like the general Catholic population, are not practising" (p. 12).

2.3. Catholic school leadership

Educational leadership is still a contentious and unclear field (Lakomski et al., 2016) and effective leadership is unquestionably necessary for schools to achieve their core goal. The research on educational leadership shows that societal culture and belief systems have a substantial impact on leadership practices (Dimmock & Walker, 2000; Shah, 2010). Faith-based school leadership is often determined by the character of schools because faith-based schools, as Sullivan (2006b) argues, require "a distinctive form of leadership" (p. 75) that follows certain religious beliefs and values (Coll, 2009a). Striepe et al. (2014) investigated three Australian schools of various denominations (Catholic, Muslim, and Greek Orthodox) and discovered that the principals of these schools employed a "framework of faith-based values to guide their practice of leadership" (p. 85). As a result, from the perspective of a Catholic school leader, leadership responsibilities and practices should be shaped in conformity with Gospel values. A clear contrast is made between the different aims of a secular school and those of Catholic education for the purposes of this study: "while the Catholic school is like any other school in the complex variety of events that make up the life

of the school, there is one essential difference: it draws its inspiration and its strength from the Gospel in which it is rooted" (Congregation for Catholic Education, 1988, para. 47).

The spiritual role of school administrators can determine whether or not the school's mission is accomplished (Fincham, 2010; Fogell, 2015; Luckcock, 2007), which can be seen to underpin the leadership structure for these schools. In the Catholic school context, and with relevance to this study, leaders are expected to be "practising Catholics who set a personal example of their faith" (Fincham, 2010, p. 65). This expectation is not dissimilar to other faith-based schools, as it is also the case for Muslim schools (Shah, 2012) and Jewish schools (Ipgrave, 2016), which aim to solidify and continue their traditions and identity in a time of secularisation and an erosion of values. Catholic schools have a number of specific characteristics, which are distinct and place them in both a similar and different context with regard to other schools. Furthermore, if it is accepted that Catholic schools do have distinctive characteristics, it is then reasonable to suggest that they require a style of leadership that fits. Catholic secondary school leadership involves navigating a web of interconnecting and fitting characteristics (Mc Laughlin, 2001). As Sullivan (2006a) argues, the unique and specific purpose of schools must be reflected in the leadership they require.

Catholic schools, as faith-based schools, are outgrowths of parish and diocesan communities; they are learning communities and they are, by their nature, communities of faith (Ferrari & Dosen, 2016). The objective of a Catholic school and the responsibility of school leadership is to unite students with Christ and to share the Gospel, and to form young people in the way of the Gospel. The purpose of the Catholic school is, in addition to the other requirements expected in all schools, to evangelise. The mission of the contemporary Catholic school is informed and influenced by the Church's mission. The Catholic school's mission is derived from the Church's mission since the Catholic school is:

> a genuine instrument of the Church, a place of real and specific pastoral
> ministry ... The ecclesial nature of the Catholic school, therefore, is written in

the very heart of its identity as a teaching institution ... It must be emphasised
that this ecclesial dimension is not a mere adjunct, but is a proper and specific
attribute, a distinctive characteristic which penetrates and informs every
moment of its educational activity, a fundamental part of its very identity and
the focus of its mission. (Congregation of Catholic Education, 1998)

There is little information available on faith-based schools and the nature and types of leadership practices according to a study of the literature. Luckcock (2007) highlights transformational and servant leadership styles, while Coll (2009b) finds that principals in Scottish Catholic schools develop a diffused leadership model, which benefits beginning teachers' faith and professional growth. According to the research, transformational leadership encourages followers to enhance their capacities and demonstrate greater degrees of personal dedication to the organisation's objectives (Barbuto, 2005; Spreitzer et al., 2005). Leaders and followers are expected to boost each other's accomplishments, morals, and motives to heights that would otherwise be impossible through transformational leadership (Crawford et al., 2003). To summarise, a transformative leader is someone who:

articulates the vision in a clear and appealing manner, explains how to attain
the vision, acts confidently and optimistically, expresses confidence in the
followers, emphasizes values with symbolic actions, leads by example, and
empowers followers to achieve the vision. (Stone et al., 2003, p. 4)

A servant leadership style, according to Fogell (2015) would enable Catholic school heads and teachers fulfil their purpose by providing better possibilities for faith development. As a person-centred approach, the emphasis of servant leadership is on components like "increased service to others, a holistic approach to work promoting a sense of community, and the sharing of power in decision-making" (Greenleaf, 1977, p. 337). Servant leaders are those who can "transcend personal self-interest and aspire to fulfill the physical, spiritual and emotional needs of others" (Birkenmeier et al., 2003, p. 375). Servant leadership, however, necessitates self-leadership:

> becoming servant leaders engages us in personal, internal self-change and changes our outward behaviour. Servant leadership models self-leadership. It encourages self-set goals. It asks leaders to create positive thought patterns, develop self-leadership through appropriate rewards and reprimand systems, and promote self-leadership through teamwork. And finally, self-leadership asks leaders to create and promote a self-leadership culture. (Fairholm, 1997, p. 149)

Whether transformational or servant leadership styles are employed, this setting of personal example of faith can often be seen to be counter-cultural in the pluralistic, often self-centred and materialistic world in which we find ourselves. The need for the Catholic school to be counter-cultural is emphasised by Bryk et al. (1993) who state:

> subsidiarity contributes to the distinctive ethos of Catholic schools by recognising that all members of the community have gifts and talents to share for the common good. An American study identified in Catholic schools an inspirational ideology by which a vision of the school as a caring community committed to social justice and the common good is promoted. To this extent, the mission of the Catholic school should challenge the competitive marketplace that is prevalent in the contemporary world. (Bryk et al., 1993, p. 66)

This example of personal faith is explored further by Belmonte and Cranston (2009) who suggest that there is a connection between faith leadership and Catholic school identity and that faith leadership is about cultivating "an ethos and culture that supports the Catholic view of life" (p 300). Respondents to the survey described their faith leadership role as a "form of ministry within the Church" in this regard (Neidhart & Lamb, 2013, p. 71). They linked faith leadership behaviours and capabilities to personal values, which reflect those found in the Gospels. Leaders talked with zeal and demonstrated that they were motivated by more than their employers' expectations when they understood their faith leadership role in this way. For example, according to studies carried out by Neidhart and Lamb (2013), faith leadership was referred to by principals as flowing out of their "vocation" (p. 72) and was

more than just professionalism. This vocation, for one principal, was "too hard to turn off" because it was at the "core of who you are" (p. 72). The work of Branson et al. (2019) emphasises the importance of connections in leadership and highlights the fact that acceptance, not appointment, is what generates leadership. Being a leader begins with acceptance as a leader (Branson et al., 2018). Simply put, before acting as a leader and using the power that is often associated with effective leadership, a person must first be acknowledged as a leader (Branson et al., 2019). Furthermore, being accepted as a leader necessitates the development of strong professional relationships that reflect the leader's personal values.

The concept of personal faith and leadership in faith for the next generation of faith leader, namely the Catholic middle leaders who are the focus of the study, needs consideration. Teachers as future leaders should be given leadership formation, according to principals (Neidhart et al., 2012; Thompson, 2010). Rightfully so, principals are concerned that next leaders may not have the necessary knowledge, abilities, and attitudes to fill the position of religious leader in Catholic schools. This could be one of the reasons why there is rising worry that there are insufficient capable middle leaders applying for principalship in Catholic schools (Stern & Buchanan, 2020). Neidhart and Lamb (2013) even go so far as to say that staff "are increasingly less confident about leading staff prayer, as evidenced in their choice of secular oriented reflections over prayers" and that many also "seem reluctant to invest in faith study, as they are not necessarily committed to staying in Catholic schools" (p. 74). Principals in the study of Neidhart and Lamb (2013) also noted that staff did not participate in parish life, and thus suggested that there was a need to build the faith leadership capabilities for leaders within Catholic education.

Specifically, the particular and unique character of Catholic schools is one that seeks the development of the "whole, integrated person which demands that Catholic schools embrace the physical, intellectual, vocational, social, emotional, aesthetic, moral, and

religious dimensions of people" (Flynn & Mok, 2002, p. 12 & 77). More recently, the vision for the Catholic school as a place of education has been summarised in *Educating to Fraternal Humanism* (CCE, 2017). Humanising education means putting people at the centre of education within a relationship-based framework that "form a living community, interdependent and bound by a common destiny" (Congregation for Catholic Education, 2017, p. 7). This would suggest that leadership within contemporary Catholic schools will become more difficult in some respects as there appears to be a decrease in both religious literacy and religious understanding.

2.3.1. A tension: decline in religious literacy and understanding

Lumbya and Ruairc (2021) highlight that the key challenge for all leaders in today's multifaith schools is the engagement with religion. They had examined data from nine English, Wales and Irish schools and how leaders understand their practice with regard to religion. Their study shows the freedom leaders have to position religion within the schools, and that how religion and values are seen and upheld is influenced by them. However, while there is freedom for leaders to position religion, it needs to be contextualised within the current religious climate. One must first consider the religious landscape in which faith schools operate.

The current religious climate is characterised by a decline in Church attendance and the "increasing privatised and marginalised role of religion in public life" (Casson, 2011, p. 207). Davie (1994 as cited by Rymarz, 2012) discusses the issue with religion in modern culture, stating that while attendance at Church services has decreased, a weak religious attachment has remained attractive. This person's religious affiliation is viewed as a figurative safety net. Gellel and Buchanan (2011) suggest that "assiduous parental religious practice together with everyday family lifestyle are seen as a means of understating one's own Catholic tradition" (2011, p. 324).

According to the 2021 Australian census, the percentage of Christians in the population has decreased to 43.9 per cent (down from 88 per cent in 1966); whereas, for three other religions (Hinduism, Islam, and Sikhism), growth was experienced. The Catholic community in Australia today accounts for 20 per cent of the population, down from 22.6 per cent in 2016 and 25.3 per cent in 2011.

Furthermore, while 60.3 per cent of Australians say they have a religious affiliation, 30.1 per cent say they have "no religion", and the remaining respondents simply did not respond to the optional question. The number of people who declared that they had no religious affiliation increased considerably from 22.3 per cent in 2011 (Australian Bureau of Statistics, 2016). Mass attendance, which reached a high point within the Catholic population of up to 75 per cent in the 1950's, is predicted to drop from its current 12 per cent to approximately 5 to 6 per cent by 2030 (Dixon, 2017). Census data affirms the decline in people identifying as religious along with a marked decrease with those attending mass services.

While there is a decline in religious affiliation, enrolment in faith-based schools remains strong. Sultmann et al. (2003) studied over 5000 independent, Catholic and state school parents, and found that parents choose Catholic schools for many reasons other than their religious beliefs, such as the educational standards. Their survey yielded consistent educational priorities for parents: student care, quality teaching, discipline, consultation, moral development, and school vision and values. Parents who choose Catholic schooling and responded to the question "What is absolutely essential?" were included in this survey. Faith growth (46 per cent), pastoral care and concern (47 per cent), and religious education all received lower than average support (39 per cent). The importance of "good relationships within safe, loving, concerned school communities" was reaffirmed in a report by Kennedy et al. (2010), which confirmed the priority and satisfaction of parents (p. iv).

Willems et al. (2012), in their study *Students' Perception and Teachers' Self-ratings of Modelling Civic Virtues: An Empirical Study in Dutch Primary Schools,* acknowledge that teachers can be considered as role models for their students since they are major socialising agents. They investigate the degree to which they can serve as examples of civic virtue. The importance of this modelling assumes a deeper dimension in a faith-based school where more than civic virtues are on offer (Coll, 2007). In a study of student teachers' perceptions of their job as Catholic educators, it was discovered that part of the tension resulted from the faith backgrounds of teachers: "although the majority [of teachers] came from practising Catholic families, the difference in their understanding and experience of faith is quite significant" (Coll, 2007, p.461). Coll continues by saying that persons who participate in Catholic Church events on a regular basis are more knowledgeable about Church activities and ideas and have a better understanding of what it means to be Catholic. One needs to remain acutely aware of the reality of a changing Western society in which faith schools are embedded. By 2010, approximately three-quarters of the world's Christian population existed outside of Europe, whereas a century ago, two-thirds of the world's Christians were European (Allen, 2009). Further exploration is needed to discover how lay teachers model their faith when, indeed, the way they practise their faith is very different from those of older generations, particularly in the Western world.

Mayotte (2010) discusses the relationship between faith and teaching, as well as the fact that teachers have a responsibility to make faith tangible in a variety of ways. Faith should be transmitted through instructions, exposed through relationships, and made palpable in both celebratory and difficult situations as indicated by Pope Benededict XV (2008) in a speech to Catholic educators when he stated: "each and every aspect of learning communities reverberate within the ecclesial life of faith". This ideal is somewhat challenged by Rymarz (2010) who claims that one of the issues facing Catholic schools is determining how to best give the essential catechesis for young people in a cultural environment that ceases to

encourage strong religious devotion. Worthy of further exploration is the way schools imbue Catholic teachings in the background of the secular world in which the schools and, more importantly, the students exist.

Mayotte (2010) suggests that staff members at Catholic schools be formed in a faith-based culture, have a close relationship with Jesus and the Church, and serve as living examples of the faith via both their words and deeds. Given the problem underpinning this research, it would appear, at a perfunctory glance, that what Mayotte proposes may not be the lived reality. Dorman and D'Arbon (2003) contend that the Catholic population's lapse in practice raises the fundamental question of whether a Catholic school can still be a sustainable faith community in today's world. The perceived connection to Church is challenged by Hughes (2008) who reports some teachers "identified that the school mass was the only mass they regularly attended and a few noted that they have felt the school to be 'too Catholic'" (p. 35).

The religious background of students attending Catholic schools may also play a role in the decline of religious literacy and understanding. The National Catholic Education Commission Report (2016), reported that 69 per cent of current students are Catholic and that 31 per cent identify as "other than Catholic". Secondary schools have a 33 per cent non-Catholic population, compared to 29 per cent in primary schools. More than half of Catholic pupils do not attend Catholic schools; instead, 49% attend government institutions and 8% attend non-Catholic private fee-paying independent schools (Canavan, 2009). It is interesting to note that low-income Catholic children are twice as likely to attend a government school as a Catholic school (Benjamin, 2010, p. 153). Furthermore, 17 per cent of high-income Catholic families send their children to non-Catholic private schools, indicating that religion is not the dominant factor in school choice. Also, Catholic schools enrol 20 per cent of students, yet just 10 per cent of Australia's Indigenous students attend. This is not the case in the Archdiocese of Sydney (Canavan, 2009). A question arising from this data is why such a significant proportion of Catholic families are not sending their children to Catholic schools. Flynn and

Mok's (2002) longitudinal examination (1972–1998) of Year 12 students' opinions towards

Catholic institutions reveals similar tendencies, with students placing a high value on

vocational and academic development, as well as wellbeing. In contrast, their analysis showed

that "while Catholic schools continue to have a religious influence on students which is

independent of the home, there has been a marked decline in the level of students religious

beliefs, values and practice over the past two decades" (Flynn & Mok, 2002, p. 321).

Therefore, this shift in how people regard Catholic education must be considered in

light of the marginalisation of religion in the face of Australia's rapid all-pervasive

secularisation. Contemporary faith leadership is a difficult task due to the changing

demography of Catholic school enrolments (Rossiter, 2013), the waning impact of religion in

contemporary culture and the dynamic link between active parish allegiance and demand for

Catholic education. As Belmonte et al. (2006) observe:

> when faced with the reality of contemporary Australian society, characterised
> by a plurality of beliefs and experiences, it cannot be presumed that all
> students, families and teachers are fully committed to the Catholic tradition or
> involved with local parish activities and worship. Given the diversity of faith
> standpoints, a non-critical awareness of the Catholic school as a faith
> community may hide a less than ideal reality.   (p. 8)

According to the literature, the number of applicants for middle and senior leadership

posts in English Catholic schools has decreased (Fincham, 2010; Gallagher, 2007; Stern &

Buchanan, 2020). Fincham suggests that "in a situation where head teachers are due to retire

and there are insufficient numbers of candidates willing or able to apply for headship, a

critical contemporary challenge is to nurture future leaders" (Fincham, 2010 p. 67). The

mainstream leadership programs are often not regarded appropriate for faith schools in the

English setting since they do not address the special demands of various faith communities in

the UK (Grace, 2009; Sullivan, 2006a). Grace promotes ongoing professional learning to

address the unique difficulties experienced by leaders of faith-based schools, and to help to

nurture future leaders. Buchanan et al. (2021) propose that, rather than being provided through a senior leadership development program, middle leaders' professional learning should be tailored to the distinctive demands of their individual roles. In many ways, these future leaders are the lay leaders who will be charged with faith leadership in these faith-based schools.

2.3.2. Leadership in faith: lay staff

Given that teaching is both a career and a vocation in a Catholic school, the necessity for formation for mission for those charged with the responsibility of Catholic education becomes evident. This is even more pronounced given the significant levels of lay leadership in Catholic schools. It's also worth noting that Catholic school lay teachers and leaders have made a conscious decision to teach and lead in the Catholic tradition. The priority for hiring and maintaining Catholic school teachers has switched from nuns, priests and brothers to educators who choose to teach in Catholic schools rather than public schools (Lacey, 2000). Additionally, the Vatican document *Education Together in Catholic Schools* (Congregation for Catholic Education, 2007) notes the communal nature of education in the Catholic tradition. "By its very nature, Catholic schools require the presence and involvement of educators that are not only culturally and spiritually formed but also intentionally directed at developing their community educational commitment in an authentic spirit of ecclesial communion" (n. 34).

Of course, all of this must be considered within the reality that before a Catholic school can be a good Catholic school, it must first be a good school. Academic achievement is an intrinsic component of, not independent from, the Catholic character of schools, according to canon law. *Catholic* is an "adjective that clarifies our ecclesial relationship and signifies what distinguishes us from public schools and other non-sectarian and religiously affiliated schools" (Cook, 2000, p. 2). Rymarz (2012) continues by discussing religious instruction in

Catholic schools within a larger and more established argument that considers the purposes of Catholic education as educational rather than catechetical. The shifting trends and changing demographics of Catholic education are best described as "at a crossroads" and is noted clearly by the Bishops of New South Wales and the Australian Capital Territory (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007). In particular the Bishops indicate:

> evangelising, forming and otherwise educating our next generation is a task for the whole Church; but the Bishops look especially to those involved in our schools to make the most of what Pope John Paul II called 'the sense of adventure' involved in renewing Catholic education. (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007)

The significance of appointing devoted Catholics to the essential and critical duties of religious education teachers and leadership positions is a major premise of *Catholic Schools at a Crossroads*. The importance of lay teachers in Catholic schools to the Church's mission must be recognised. Rymarz (2010) identified that Catholic schools are mostly derived from the people who are involved with them, and Catholic identity is based on a large number of persons who bear real witness to the organisation's principles. What needs further exploration are some of the reasons why Catholic parents, and an increasing number of non-Catholic parents, opt for Catholic schools for their children. Williams believes that there is still a belief that attending Catholic schools provides "positional advantages" and that parents may not choose Catholic schools for religious reasons (2010, p. 29). The role of lay is significant given what Groome (1991) would suggest is the basis of Catholic education: "a critical engagement between the learner, their experience and the story of the faith tradition" (as cited in Rymarz, 2012).

There are numerous reasons why the Church is concerned about maintaining a "critical mass" of Catholic teachers in Catholic schools. (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007, p. 10). Therefore, if Catholic schools are to

fulfil the Church's mission, all senior leaders should be devout Catholics who are eager to

embrace the current goal of the Catholic school and effectively guide and motivate their peers

and students' parents. When Catholic institutions do not have enough people who truly

embody the values and objectives of the institution, problems with Catholic identity are made

worse (Rymarz, 2010).

The year 2012 marked the fiftieth anniversary of the Second Vatican Council's

beginning (Chambers, 2012). Now, after 60 years, it is still regarded as a watershed moment

in the Church's self-understanding. The clear emphasis on the teacher in Catholic schools was

established at the Second Vatican Council (1961–65): "teachers must remember that it

depends chiefly on them whether the Catholic school achieves its purpose" (Pope Paul VI,

1965). This is then developed further by:

> a significant responsibility for creating the unique climate of a Christian
> school rests with the staff as both individual and community for the teacher
> does not write on inanimate material but on the very spirit of human beings.
> (Congregation for Catholic Education, 1982, n. 19)

It is clear that the formation and development of this very important role of teaching

and leading needs to be deepened and nurtured.

> The goals of this religious formation must be personal sanctification and
> apostolic mission, two inseparable elements in a Christian vocation. It requires
> a human and well-rounded formation, as well as a formation in spirituality and
> doctrine. (Congregation for Catholic Education, 1982, n.65)

The consequences of the profound impact that teachers have on those they educate and

the role they play in the transmission of faith is at the very core of the research problem. The

impact of teachers needs to be contextualised with the reality of laity in Catholic schools. In

2016, there were roughly 91,000 lay personnel working in Australian Catholic schools, with

80 per cent of primary school teachers and 61 per cent of secondary school teachers

identifying as Catholic (National Catholic Education Commission, 2016, p. 11). The report

adds that, of those staff who identify as Catholics, 25 per cent are engaged in regular worship and "for most staff, the Catholic school is their only regular experience of Catholicism" (National Catholic Education Commission, 2016, p. 11).

The importance of staff in the classroom and in leadership is growing as Catholic schools strive to become more mission focused. The role of staff in the evangelisation of individuals entrusted to their care is evident if the school's mission is the Church's mission, and if the Church's purpose is to evangelise. In the formative environment that is the Catholic school, this evangelisation of each individual (self), the role of teacher and of leader needs further exploration.

2.3.3. A faith disconnect? The role of parish

Costelloe (2009) summarises the characteristics of a Catholic school as "an innovative, engaging and comprehensive religious education program, a well-developed sacramental program where appropriate, a regular experience of liturgy and prayer, and a good relationship with the local parishes and clergy" (p. 3). A school lacking these qualities "is quite simply not a good Catholic school" (Costelloe, 2009, p. 4). Although Costelloe does not define the idea of a positive relationship with the local clergy and parishes, he does state that the Catholic school needs to have a solid relationship with the parishes. In the context of Catholic secondary schools, this link between the school and the local parishes must be clarified and clearly established, and it cannot be assumed.

Furthermore, it appears that there is a disconnect between the Catholic school and the local Church or parish (Harrington, 2006). What does the relationship between the Church and the school look like if the Church literature perceives the Catholic school as vital to the Church's mission, as indicated in this review? The data indicates that the gap is growing. (Battams, 2002; Quillinan, 1997). The proximity of a school to a Church might contribute much in accomplishing educational goals. In the diocese of Sydney, all the primary schools

are indeed situated alongside the parish. The same cannot be said for Catholic secondary schools. Although it may seem as though the historical link between the parish and the school has been severed, this is actually a result of how different society and culture are now for Catholics.

Quillinan (1997) and Battams (2002) both undertook empirical studies, which include an examination of the relationship of school and parish. According to Quillinan, 15% of primary school administrators and 10% of secondary school administrators thought that parents who decided to send their children to Catholic schools did not regularly follow their own religious beliefs. In terms of parish involvement, the primary school survey responses reveal that parish involvement appears to be limited to significant events, like the first Eucharist, Confirmation, and Reconciliation. The Church does not appear to provide "meaningful experiences to children as was provided by primary schools" (Quillinan, 1997, p. 53). The situation wasn't much better in secondary schools.

> For most students the school was their parish. A number of secondary schools were regionally based and subsequently were not associated with a single parish; however, the school provided a microcosm of a typical parish through the spiritual experiences that were presented in the school environment. (Quillinan, 1997, p. 57)

While the parish and school appeared to operate independently of one another, Quillinan's study (1997) discovered a lack of communication between parish and school leaders, resulting in a lack of shared understanding of the Catholic school's purposes; in fact, the Catholic schools appeared to be many students' only exposure to the Church. The significance of Quillinan's research for the sake of this study demonstrates the distinction between parish and school. It emphasises a divide between the parish and the school, which looked to have evolved through time but was inexplicable when the Catholic education system was first established in the late 1800s.

Battams (2002, 2006), on the other hand, by rooting the issue of the Catholic school's validity in the purpose of the Church, these and other questions can be carried a step further. Battams (2006) believes that Catholic schools should be located within the Church in order to be authentic and that "understanding the nature and purpose of Catholic schools ... is fundamentally an ecclesiological task" (p. 10). In order to properly define the issue of the Catholic school's legitimacy, according to Battams (2006), it was necessary to consider how the Church views itself. Insofar as this was unknown, so was the Catholic school's understanding of itself. The resultant consternation was succinctly stated by Battams:

> schools currently strive to offer students a meaningful and relevant experience of the Church. Because the Church is perceived to be a distant and irrelevant fringe-dweller, however, this is an experience that will rarely if ever be extended on or nurtured in the parishes. Consequently, schools are beginning to become self-contained Churches. In many ways they are involved, albeit reluctantly, in developing an alternative identity, not only to the demands of the world but also the Church, at least as it currently exists as a historical reality. In trying to help participants engage with the Church, in other words, they are sometimes required to do this in spite of the Church. While this is not their desired intention and they are in reality striving to build bridges to the wider Church, these by and large remain virtually untrodden by the increasing majority of their participants. The reason for this is that these bridges lead to a place where the absentee landlord resides who in reality is little more than a fringe-dweller. A great many students, teachers and parents do not want to travel to this place. (Battams, 2002, p. 382)

The Church and the school are clearly separated in this way. The school grows detached from its historic underpinnings as an agent in the Church's mission. While Catholic education is a Church ministry, schools are not organisationally or theologically equipped to do what is required. This is the "responsibility of the whole of the local Church" (Battams, 2002, p. 384). Due to a shortage of clergy and declining practise, parishes are facing difficulties. For many in the community, schools have come to represent parish, which is a

major issue. Rymarz (2010) highlights data on sacramental participation by Catholics, which in Australia is more parish based than school-based, and shows a steady and consistent decline.

Dixon (2002) indicates a significant decline in Church attendance, and research on practices and belief of high school students (McQuillan, 2009; O'Brien, 2005) has also pointed to a decrease in belief at a personal level. As a result, the parish's role in the faith lives of individuals who attend Catholic schools is called into doubt. This underscores a myriad of issues faced by Catholic schools, teachers and leaders today, as they are not the sole educators of youth in faith. Schools need to work closely with both the family and parish. Casson (2011) would argue that a Catholic school cannot deliver the same depth of Catholic faith heritage as a vibrant Catholic community. As Engebretson (2008) suggests, "the Catholic school cannot be a substitute for the Catholic Church" (p. 159). If this be the case and the parents abdicate their responsibility to the school, the importance of the role of lay leaders as educators of faith could be seen as overwhelming. This would emphasise the need for the parish and school to work together. The teaching of faith and the shaping of students' religious beliefs are not only the responsibility of Catholic schools or its teachers and leaders. For this reason, the role and relationship between school and parish needs to be explored.

The relationship between the parish and school leadership is vital. Both are important because they serve the Church in the divine mission to evangelise and educate (Belmonte & Cranston, 2009; Weiss, 2007). Castel et al. (2002) when examining the role of principals from both secular and public schools in Ontario, found the five major roles to be management tasks, relationship building, accommodating special needs, mentoring, and direction setting; these apply to principals whether they are secular or Catholic. A limitation of the findings of Castel et al. (2002) is the reality that they do not acknowledge the additional unique tensions and pressures that exist for Catholic school principals. One such specific tension is the expected collaboration with the local clergy and the parish's engagement in the school's

activities. Weiss (2007) looks at this tension by relating the Catholic school system to an organisation. She claims that even if the principal is a well-prepared and knowledgeable educator, the parish priest is required by the Church to have final say in how the school is run, since the Catholic school is seen as an extension of the parish. DeFrenza (2015) concludes that priests and principals need to find new opportunities to bring Catholics back to the faith, and that both the pastor and the principal are human beings who each have their own faults. "If priests and principals have a problem with people who are not 'Catholic enough', it is no longer acceptable for priests and principals to exclude those teachers, parents or students" (DeFrenza, 2015, p. 96). What is needed is for both priest and principal to keep their priorities focused on the faith together.

Examining some of the underlying difficulties that may result from the conflict between the parish and school is important for aspiring Catholic school administrators. In his book *Catholic Education: Ensuring a Future*, Mulligan (2006) investigates this tension. He examines the relationships between priests and school educators by exploring the positives and not so positive concerns in the partnership. From conversations with priests, principals, and teachers, Mulligan identified a number of concerns and expressions of appreciation that are shared in the relationship between the representatives of Church and school. The research highlights that the relationship between the parish and school needs to be resolved with a sense of mutual respect so that the leaders can become a cohesive unit to serve a higher good (Belmonte & Cranston, 2009; Mulligan, 2006; Weiss, 2007).

The Catholic school, as an ecclesial agency, exists with and for the Church, and its leadership is responsible for this agency. This stresses the importance of leadership and, in the context of this study, the importance for formation for mission of middle leaders and their understanding of the evangelising mission of the Catholic school.

2.4. Catholic school middle leadership

"Whatever you do in your word or work, do all in the name of Lord Jesus Christ" (Col 3:17).

2.4.1. The Catholic educational middle leader

The review of Lipscombe et al. (2021) demonstrates how middle leadership differs from principalship and that, despite their similarities, principal leadership and middle leadership are two different notions. While there has been a comprehensive investigation of leadership at the principal level at secondary (Davison, 2006; McEvoy, 2006; Thompson, 2010), primary (Coughlan, 2009; Neidhart, 2016; Neidhart & Lamb, 2011), and primary and secondary (Belmonte & Cranston, 2009; Neidhart & Lamb, 2011; Neidhart & Lamb, 2013) in Catholic schools, the same cannot be said for the leadership of middle leaders. Catholic school leaders have a unique leadership role that is not shared by others: "to act to ensure that students learn what it means to be Catholic – both morally and intellectually" (Schuttloffel, 1999, p. 2), and this is no different for middle leaders in Catholic schools. Those in positions of leadership must balance the normal demands of all educational leaders with the religious mission of Catholic education and the oversight of the school community's faith formation.

There have been numerous attempts to provide a definition of *middle leadership* (Busher & Harris, 1999; Fitzgerald & Gunter, 2006; Flessa, 2012; Grootenboer et al., 2020; Hammersley-Fletcher & Strain, 2011; Hunter-Heaston, 2010; Koh et al., 2011; Lipscombe et al., 2021; Marshall, 2012; Ribbins, 2007; Wise, 2001) and a single definition has been elusive given the term can refer to a variety of categories and teachers within a school. Wise's (2001) definition of *middle leader* recognised several overlapping subgroups in schools, all of which contribute to the curriculum. Wise (2001) indicates that middle leaders are "those responsible for an aspect of the academic curriculum, including departments and faculty heads, curriculum team leaders and cross-curriculum coordinators who are expected to have

responsibility for one or more teachers" (p. 334). While this definition focuses more or the academic side of the school, the definition given by Gunter and Ribbins (2002) is that middle leaders are individuals who have learning or welfare responsibilities and are paid a certain amount of money. Lipscombe et al. (2021) defined *middle leaders* as "formally appointed leaders, with accountable responsibilities, who operate between senior leaders and teachers, and lead in order to positively impact teaching and student learning" (p. 14). In general, middle leaders lead in order to positively influence teaching and learning in both direct and indirect ways.

As a faith-based school leader, all leaders in a Catholic school, especially middle leaders, should have a thorough understanding of Catholic education as an "integral part of the Church's teaching mission; A person of faith who is able to communicate this faith with others; A person whose lifestyle is founded upon Gospel values and who is a role model for students, parents and faculty; A moral educator and leader" (Travis & Shimabukuro, 1999, p. 338). Middle leaders are seen as mediators, translators and gatekeepers (Abolghasemi et al., 1999; Balogun, 2003; Rouleau, 2005; Harris & Lambert, 2003; Jones, 2006). These characteristics emphasise the importance of middle leaders in carrying out the Church's educational aim. The middle leader operates as facilitator or knowledge agent (Blumentritt & Hardie, 2000). Where they are given the skills and the organisational latitude to do so, middle leaders in education can have a significant impact (Adey, 2000; Brown et al., 1999; Glover et al., 1998). This can be difficult in a faith-based Catholic school where, as described by Wilkin (2019), it requires making an effort to interpret and present the Gospel in a way that respects Catholic tradition while being applicable to students, many of whom are either unfamiliar with or hostile to Catholic traditions.

Middle leadership in lay ecclesial ministry is difficult. Examining the concept of educational leadership, not in the narrowest sense of the principal leader's leadership, but in the broader sense of leadership that includes the roles of others in the educational endeavour,

is beneficial. Good leadership is a critical factor in schooling, and one that is not just the prerogative of the principal. Grootenboer et al. (2020) point out that middle leaders have not received much attention in development and research forums. However, there has been research on the various challenges that today's Catholic school principals have to deal with (Cannon, 2004; Mellor, 2005; Sinclair & Spry, 2005). They have all detailed the challenges encountered by Catholic school principals in the face of changing demography, parish and school dissonances, and current social changes. It's also crucial to consider the needs of leadership as they are carried out by those who make up the community, for which there is little data. The Archdioceses of Brisbane and Melbourne have created their own school leadership frameworks to this end. Both the *Development Framework and Practice \Standards for Catholic school Leadership* (Catholic Education Commission of Victoria, 2005) and *Framework for Leadership in Queensland Catholic Schools: A Report (*Spry et al., 2004*)* attempted to describe the complicated character of leadership that is now expected of Catholic schools.

The Catholic Education Commission of Victoria (2005) has had a significant emphasis on educational leadership "as distinct from leadership for management, or administrative leadership," and it also argues that "leadership is best understood as a feature of organizations rather than a characteristic of individuals" (p. 1)

> The concept of leadership is not viewed as being either conferred or bound by role, but as being accessible to any individual within a school …. the framework is not role specific and is not tied to positions of responsibility. It is not a role description.   (p.2)

This leads to the notion that leadership can be a component of all teachers' work, not only those who have been assigned to specific duties. Indeed, "effective schools are characterised by the capacity and willingness of teachers to initiate leadership activity" (Catholic Education Commission of Victoria, 2005, p. 1). This acknowledges and promotes leadership in all its forms as it exists in the school. It is the duty of everyone in the school to

promote social justice, not just the social justice leader; it is the duty of everyone in the school to promote wellbeing, not just the wellbeing leader. A fundamental precept of the Catholic Education Commission of Victoria (2005) is that leadership in all aspects of school life, not just faith leadership, needs to be shared.

These ideas of shared leadership and the necessity for everyone to develop leadership skills are also expressed in Brisbane's *Framework for Leadership in Queensland Catholic Schools: A Report (*Spry et al., 2004*)*. The report emphasises the necessity to understand that leadership is multi-faceted and complicated, and that it is vital to create a culture of shared leadership in which decision-making duties are divided throughout the institution. Leadership is also "working with and for community as evidenced in patterns of cooperation within a Christian community" (2004, p. 13). The frameworks strive to establish the basic characteristics of leadership in schools using these concepts as a foundation, which is relevant to this study because it examines the function of middle leaders in the Catholic secondary context.

The concept of shared leadership highlights the relational nature of leadership – between those who want to be leaders and those who want to be followers - and how this is supported by "exemplary leadership" (Kouzes & Posner, 2004, p. 58). Noddings (2010) contends that the ultimate goal of leaders is to produce people who will engage successfully in caring relationships that are accomplished through modelling, practice and confirmation. To teach virtues, we must first exhibit virtues, and effective leaders engage in effective relationships. The leadership of middle leaders, in the context of this study, is therefore best expressed through relationship.

2.4.2. Middle leadership is relational

The work of Branson et al. (2019) highlights the fundamental role of relationships in leadership. Duignan (2008) asserts that many leadership academics and writers believe that

good leadership is mostly an influencing process and is centred on relationship when he suggests:

> if influencing is central to leadership, then it is also proposed here that the best way to influence others is to develop mutually rewarding authentic relationships with them. A simple connection among the concepts would suggest that without relationships there is unlikely to be much influence and without influence there is unlikely to be leadership in the way we have defined it here. (2008, p. 3)

This is further explored when Duignan (2008) asserts that in order to affect those in their domains of influence, leaders must establish relationships based on honesty, trust, and respect for the worth and dignity of others. To achieve this properly, leaders must first and foremost be decent people. Begley and Stefkovich (2007) maintain that leadership is "essentially focused on people and relationships" (p. 401). In essence, trust and respect for others are critical components of any meaningful relationship and authentic leaders should engage with others while displaying such qualities. Grootenboer et al. (2020) point out that research has shown that when educators talk with one another about their practices they are creating a "dialogic space that not only sets up conditions for deepening their understandings but, at the same time, these conditions create a relational space that makes trust possible" (p. 49). Relational trust is, at its core, multidimensional and multilayered, and without it the "wheels of collegiality grind to a halt" (Grootenboer et al., 2020, p. 99). Trust is precious and underpins relationships.

Buchanan et al. (2021) contend that interpersonal competence, cooperation and teamwork must be seen as critical in the role of leader, whether that person be a supervisor, faith leader or colleague. This implies that collegiality, cooperation and the development of strong relationships should be at the heart of middle leadership, not just a component of it. Strong interpersonal interactions should underpin all aspects of Catholic school middle leadership.

Effective leaders engage in effective relationships. Bassett (2016) found that managing relationships was often the most challenging part of what middle leaders do. The findings of his research complemented the study of Fitzgerald and Gunter (2006) who found that leading learning at all levels within the school involved both influencing and working with others. In the context of this research, the effective relationship needs to be underpinned by those values found in the Gospels. This notion, however, must be placed in the context of the reality of Catholic school staff, where data indicates a growing detachment from the ecclesial Church. This has implications for the research question. If one is to consider how relationships are Gospel informed, then one must also consider how those same middle leaders are influenced by the Church in a more general sense.

Costelloe (2009) points out that all within the Catholic school share the teaching role of Christ in a "sacramental" sense. There are various ministries and vocations in the Catholic school that go beyond the work of the principal. This includes people in other middle leadership positions, in addition to RE teachers and the Religious Education Coordinator, as well as those in charge of spiritual formation and mission. As a result, there may be a need to re-imagine Catholic school work in the framework of lay ecclesial ministry, which includes many more people than just principals and executive leaders. It is these others, namely the middle leaders, who form the focus of this research. Starratt (2004) affirmed the "authentic educational leader unceasingly cultivates an environment that promotes the work of authentic teaching and learning" (p. 81). Middle leaders should build and maintain a supportive environment for both student and staff learning in their respective responsibilities, allowing the school's learning goals to be realised. This is best expressed through the relationships they demonstrate with others.

2.4.3. Preparation for lay middle leadership in Catholic secondary schools

Intrator and Kunzman (2006) stated that "formation ought to start with the soul – the very passion and purpose that animate teachers' ongoing commitment to students and learning" (p. 39). Duignan (2003) asserts that the beginning of the formation of a capable leader is personal change that results in a greater awareness of one's own principles and a firm belief in one's ability to make a difference in the lives of those around them. Duignan and Bhindi (1997) contend that to become a genuine leader, one must first determine one's position on critical moral and professional issues, and then act on that knowledge. It would appear, given the literature, that the role of an authentic leader in Catholic schools starts with self, which is necessary to ensure the school's Catholicity. In the Catholic school context, the ability for leaders to lead with authenticity is necessary.

Despite the academic focus given to the position of middle leaders in schools, it remains "unclear exactly how far the knowledge base has expanded or deepened, and how far the shortcomings of this evidence base have been adequately addressed" (Harris et al., 2019, p. 257). Dorman and D'Arbon (2003) found that many individuals in the ranks from which principals were selected (assistant and deputy principals) claimed they lacked the confidence to submit an application for the position of principal. This may suggest that these lay educators did not feel appropriately prepared to engage in such positions of responsibility and did not want to engage themselves. Duignan and Cannon (2011) asked what this says about their leadership capabilities, and they questioned what this says about our assumption that the position of assistant and deputy principal is part of the career path preparation for principalship. Fast forward 20 years and it would appear that not too much has changed. Given, as Neidhart and Lamb (2013) suggest, that middle leaders in Catholic schools have had insufficient help in becoming extremely successful spiritual leaders, and that this is likely why there is a rising concern about a shortage of properly skilled middle leaders now pursuing

principalship (Stern & Buchanan, 2020). Clearly, this has relevance to the research problem as the preparation processes proposed for those aspiring to leadership ought to be designed to better prepare all candidates for all aspects of middle and senior leadership. As Harris et al. (2019) argue, this reinforces the case for increased study attention to the unique needs of middle leaders "while much has been written about middle leaders and middle leadership since 2003, how far this constitutes a significant gain in empirical understanding or a demonstrable contribution to knowledge remains debatable" (p. 277).

There has been little investigation into why younger staff in schools are afraid to assume senior or middle leadership roles (Fincham, 2010; Harris et al., 2019; Rhodes, 2012). It is evident from the scarce study on teachers' desire to hold middle leadership positions in schools that principalship is the only post for which there is much research. The majority of this research focuses on teachers' general decisions to become school leaders (middle or senior leadership roles), rather than individual decisions to become middle leaders (Wilkin, 2019). The few studies that particularly explored why teachers become middle leaders are the exceptions (Busher, 2005; Fletcher-Campbell, 2003). A number of the researchers who have written about why teachers aspire to be in a position of school leadership were created in response to a need to source talent in school leadership (Rhodes & Brundrett, 2009). A variety of factors are described that influence teachers' decision to aspire to school leadership roles in general, just as they are in the research on teachers' decision to become principals.

Teachers who want to be in middle leader roles are encouraged by the concept that leadership provides the potential to have an impact on others (Busher, 2005). According to Busher's study's participants, middle leadership provided possibilities to "assert their voice and their ideas more strongly within their school" (2005, p. 143). While the study had a focus on improving the "learning community," it did consider middle leadership from both the subject and pastoral domains. While it did not relate specifically to faith-based schools, for the purpose of this study, Busher (2005) examined how the values and culture that underpin

the sense and notion of community are necessary attributes of the middle leaders as a means to contribute to that community. The belief that middle leadership positions have the possibility to have an impact on others is one motivation for becoming a school leader. This was also cited as a motivator for teachers to pursue principalships. This further re-enforces the reality that middle leaders in faith-based schools have expectations beyond those of counterparts in secular schools and that they also have responsibilities in the faith domain. Fletcher-Campbell (2003) discovered that supporting teaching and learning was a reason for assuming these types of school leadership positions in her research of middle leaders, especially subject leaders in secondary schools. "The love of teaching, the subject and the classroom ... influenced decisions to seek middle management" (p. 9). Her study revealed that moving to higher positions would take teachers away from the love of classroom teaching, and in doing so, created a tension between wanting to promote and influence and not wanting to move away from their love of teaching. The same can also be said for moving beyond middle leadership roles to higher positions. In Fletcher-Campbell's (2003) study, middle leaders saw their leadership role as "a way of creating the curriculum relevant to the subject area to which they were dedicated" (p. 9), and being promoted meant abandoning this commitment. This indicates a conflict that exists at all levels of leadership.

This supports the findings of Struyve et al. (2014), who found middle leaders in Flemish schools identified themselves as teachers first and foremost. While having only a small study of 26 respondents, Struyve found that teacher leaders were fully aware of the "teacher" and "administrator" zones and how middle leadership forces the need to commute between the two zones. The research shows that:

> all respondents emphasize that they do not wish to be placed higher in the hierarchy and also express the desire to continue their relationship with their former teacher colleagues from the perspective of the teachers' zone. (Struyve et al., 2014, p. 219)

Struyve found that by taking on leadership roles that teachers were concerned about putting their teaching relationships at risk, felt lonely in their roles as they were not placed outside the teacher zone, and were dismayed by the added workload. This gives insight as to the challenges of middle leadership and why teachers may be reluctant to take on middle leadership roles

The exclusion that can be experienced once a teacher moves into a leadership role is noted in the study of religious education leaders by Buchanan (2018). While it is recognised that these leaders were experienced and qualified to teach in many instances across a variety of departments, several participants in the study sensed a distancing from their colleagues. Interestingly, according to Hudson (2016), the staff's avoidance of the religious education leader was not unexpected given that Australia is a secular country and that there is a growing lack of knowledge of or aversion to religion. This, however, adds to the reality that for some, taking on additional responsibilities of middle leadership leads to a sense of disconnect from colleagues, and hence, there can be a reluctance to take on such roles. Buchanan (2018) points out the additional nuisances of middle leadership within a Catholic context where expectations are greater than those in secular schools.

Bassett (2016) examines first-time New Zealand middle leaders and the challenges they see to taking on a middle leader's role. While only a small qualitative study, Bassett's work found that while beginning teachers were given both induction and mentoring, the same cannot be said for middle leaders. The study emphasises the tension that middle leaders have, and they lack confidence in their capacity to carry out their leadership tasks successfully given that they are in the midst of the hierarchy between the teaching staff and the senior leaders in their school communities. A recommendation of Bassett (2006) is to provide such a program that focuses on the unique role and challenges of such a role. Bassett also states that middle leader development is both necessary and difficult. This has significance for this

study, as this lack of development and preparation for the multi-faceted middle leadership role needs to be both explored and addressed.

Whilst Grootenboer et al. (2020) posit that middle leaders are key agents in leading curriculum, pedagogical development and professional learning, they also highlight that there is a dearth of professional learning specifically designed for middle leaders. They point out that as middle leaders "they are in the action and everyday practices of the classroom, doing the grounded work of education in practical ways" (p. 10). They understand and empathise first-hand the context of teaching. It is a reality that most preparation programs for middle leaders can be seen from the context of teaching, and as presumably expert teachers, as middle leaders lead this aspect of school life. If middle leaders were feeling apprehensive about leadership and their capacity to do so then this is exacerbated in a faith based school where that middle leadership role also requires the leadership of a faith element within the school. The role of middle leaders can be even more complex given their positionality within the school. Middle leaders "undertake their practices between the principals leadership and the pedagogical practices of the classroom teachers" (Grootenboer, 2020, p. 9). This invites discussion as to the transferability of skills to lead curriculum, pedagogy and professional learning and the skills necessary for middle leaders to lead the faith dimension within their community. This highlights the point made by Edwards-Groves & Ronnerman (2012) that middle leaders have the most significant impact on the professional learning and development of their teaching peers and colleagues.

Teachers desire middle leadership positions because they understand that, despite the drawbacks, these positions offer chances to institute change. Several variables are also revealed by the literature that deter aspirations to middle management, including the desire to strike a balance between work and other elements of life, as well as ideas about teaching and leading. Concerns about managing work and other elements of life have been noted as a factor

preventing teachers from pursuing principalships and other school leadership posts (Fletcher-Campbell, 2003; McKenzie et al., 2014; Rhodes & Brundrett, 2008).

One of the key causes of 54 per cent of Australian secondary teachers not applying for a leadership post was the difficulties in striking a work-life balance (McKenzie et al., 2014) Classroom teachers were reluctant to assume a leadership position because it was challenging to juggle their work commitments with their personal lives (Fletcher-Campbell, 2003; Rhodes & Brundrett, 2008). What these studies failed to investigate were the additional faith demands that middle leaders in Catholic school's experience, and the impact these additional demands have when taking on additional leadership roles.

2.4.4. The faith dimension of lay middle leadership in Catholic schools

On top of their other middle leadership obligations, Catholic school middle leaders experience greater conflict since they are expected to actively support the school's Catholic mission and identity. The Congregation for Catholic Education (1982) stressed the importance and sacredness of these lay Catholic middle leaders and educators. The Church now recognises the capacity of the laity to guide young people into following Gospel values as members of the Church. People who work as laypeople are immersed in the world's activities and vocations, as well as in daily familial and social settings (Second Vatican Council, 1965, n. 32). The role of lay teachers in Catholic schools has evolved as they move into middle leadership and other roles, such as principals and assistant principals, that were once predominantly held by those in religious orders. Middle leaders are expected to try to interpret and model the Gospel message that aligns with tradition, while at the same time trying to ensure relevance for students (Wilkin, 2019). This expectation is outlined in *Educating Together in Catholic Schools: a Shared Mission Between Consecrated Persons and Lay Faithful* (2007), which reaffirms that true lay people can help the entire educational community differentiate more

accurately the evangelising ideals included in these indications by putting their religion into practice in the context of their families and society.

There was a smooth transition in Catholic schools from religious to lay staff from the time of the Second Vatican Council (1962–1965), having up until 1950 been staffed almost entirely by religious teachers (Canavan, 1998). Lay teachers are a somewhat recent phenomenon. In 1972, all Catholic schools in Sydney had a religious principal. In 1996, that rate was 19 per cent (Canavan, 1998). In 2008, this figure was just 5 per cent, with religious principals soon to retire, and thus, the number continues to decline (Catholic Education Commission New South Wales, 2011). This amplifies both the importance and unique mission of the lay educator, and more specifically, the middle leader in Catholic schools.

The importance of lay teachers in Catholic schools to the Church's mission must be recognised. Rymarz (2010) is correct when he claims that the people associated with Catholic schools are the primary source of their identity, and that Catholic identity is based on a large number of people who give actual testimony to the organisation's principles. The need for formation for those teaching, and in particular, those in middle leadership positions in Catholic schools also has to be acknowledged. Grace (2010) reveals that research indicates formation helps Catholic educators develop the religious and spiritual capital they need to keep their sense of mission alive in their work. The necessity for strong, organic and complete formation program to develop the faith of lay Catholic educators has long been emphasised in Apostolic Exhortations (Graham, 2011). The formation of Catholic school teachers must be integrated into and supplemented by their professional learning and experience (Congregation for Catholic Education, 1982, n. 65).

Sunley and Locke (2012) argue that teachers' dedication to their profession necessitates more than contractual conformity, as pedagogy is based on personal and professional ideals. Sunley and Locke (2012) also pointed to the need for explicit opportunities for teachers to reflect on their own professional and personal values to "enable

them to model what they ask of their students with integrity" (p. 285). This bolsters the clear and distinct position of the Catholic educator, which has been recognised in post-Vatican II ecclesiastical literature as requiring assistance. While the importance of people who teach and lead in Catholic schools is acknowledged, as is the fact that Catholic schools are staffed mostly by lay teachers and leaders, research about what it is like to be a teacher in an Australian Catholic school is scarce. It is worth noting that research has proven that paying more attention to personal significance has resulted in significant gains when it comes to integrating personal development and awareness at work (Twigg & Parayitam, 2007).

Here, the internal, private, and personal worlds of the Catholic school lay middle leader and the external world of Catholic education converge. Capper (2005) asserts that our epistemologies are inextricably woven into our spiritualities. This reinforces the high importance of formation for mission and preparation for lay Catholics in middle leadership within Catholic schools. This theme is relevant to the research question proposed as Catholic schools seek to be more "mission authentic" and the role of staff, at both the classroom and leadership level, is attracting increasing attention. If the people who are involved with Catholic schools are mostly responsible for their identity, as Rymarz (2010) claims, and Catholic identity relies on the concrete witness to the beliefs of the organisation, the faith life of the lay middle leaders, at the core of this research, is of importance.

The Church's mission is to evangelise. Given the significance of middle leaders, concerns regarding Catholic identity are increased if Catholic institutions do not have enough people who can effectively represent the values and objectives of the institution (Rymarz, 2010). If Catholic schools are to successfully carry out the Church's mission, all leaders and teachers must be devout Catholics who are willing to embrace the mission of the Catholic school today and motivate their staff and parents in accordance, realising that the school's mission is also the Church's mission. Middle leaders are required to actively promote the school's Catholic mission and identity, and are expected to be "new evangelists" who willingly

and readily "proclaim and spread" the Gospel message (Pontifical Council for Promoting New Evangelization, 2020, p. 31). For the purpose of this study, the role of middle leaders in the evangelising role of the Church needs further exploration.

2.5. Evangelisation

2.5.1. An understanding of evangelisation

The Church was "born to evangelise", (Synod of Bishops XIII Ordinary General Assembly, 2012, para. 166) which is "the process by which the Church, moved by the Spirit, proclaims and spreads the Gospel throughout the entire world" (Congregation for Catholic Education, 1997, p. 48). *Evangelii Nuntiandi* gives us an encompassing notion of evangelisation as a catch-all phrase for all kinds of Christian testimony to the Word of God (Pope Paul VI, 1976). Pope Paul VI spoke of evangelisation as a deep identity of the Church: "evangelisation is in fact the grace and vocation proper to the Church, her deepest identity; she exists in order to evangelise" (Pope Paul VI, 1976, p. 14). Evangelisation in this context entails "the proclamation of the Gospel, to Christians and non-Christians, in an attempt to awaken and/or nourish faith" (Brennan, 1987, p. 6).

However, an understanding of evangelisation – in our current secular, materialist world and, in particular, understanding evangelisation in a Catholic context – remains somewhat elusive. "For many Catholics, the term is rather foreign sounding; it may actually be an alienating word for some people who connect evangelisation only with tent meetings, bible thumping, or a hard sell to preaching or sharing the Gospel" (Brennan, 1987, p. 5). Brennan (1987), being aware that it may be somewhat alienating, concluded that "evangelisation is the central mission of the Church in general and of individual Christians in particular" (p 5). In a Catholic school, there has been a progressive shift towards systemic support for the religious dimension of all learning during the last 20 years (McGrath, 2005). If

evangelisation is critical to the mission of the Church, and if the Catholic school is the principal arm of the Church, it stands to reason that it must also be critical to the school.

Pope Paul VI (1965) asserted that teachers must recognise that they play a major role in whether the Catholic school succeeds in its mission. Furthermore, teachers should be well-prepared for their jobs, with the necessary qualifications and training, both religious and secular. This is at the heart of the research problem. The emphasis in *Catholic Schools at a Crossroads: Pastoral Letter of the Bishops of New South Wales and the Australian Capital Territory* (2007) is on schools becoming centres of the new evangelisation. This demonstrates Catholic schools' interest in passing on Catholic religion, life and culture, as well as their understanding of the critical role that teachers play in this regard. The mission of the Catholic school is to "evangelise, and be the face of Christ to students and parents, since the school has been established to assist with the mission of the Church" (McLaughlin, 1998, p. 25). In fact, "it has become almost a truism to say that the school is the only Church which many students know (and it) offers ... many of the manifestations of Christian life which have always been recognised as defining Church" (D'Orsa, 1999, p. 125).

The Catholic school has a special responsibility for evangelisation, which it actively pursues "to bring the Good News into all areas of humanity, and through its impact, to transform that humanity from within, making it new" (Pope Paul Vl, 1975, para. 18). Through evangelisation, the Church " seeks to convert solely through the divine power of the message she proclaims, both the personal and collective consciences of people, the activities in which they engage, their ways of life, and the concrete milieu in which they live" (Pope Paul Vl, 1975, par. 18). Catholic schools have even a "more critical role in proclaiming or communicating the Gospel message" (Pope Paul Vl, 1975, para. 27).

"New evangelisation is a term used by Popes Paul Vl and John Paul ll instead of *mission"* (Schroeder, 2008, p. 3). It encompasses the entirety of the Church's purpose, therefore it goes beyond merely imparting knowledge, but also proclaiming Jesus Christ via

one's words and acts, or "making oneself an instrument of his presence and work in the world" (Congregation for the Doctrine of the Faith, 2007). Evangelisation implies that "social issues and the Gospel are inextricably linked, and that everyone has the right to evangelise," as well as that "every person has the right to hear the 'Good News' of the God who reveals and gives himself in Christ, so that each one may live out in its fullness his or her proper calling" (Congregation for the Doctrine of the Faith, 2007, para. 2). This has application in the Catholic schools as

> [t]he Catholic school, characterized mainly as an education community, is a school for the person and of persons ... [I]t aims at forming the person in the integral unity of his being, using the tools of teaching and learning where criteria of judgement, determining values, points of interest, lines of thought, sources of inspiration and models of life are formed. (Congregation for Catholic Education, 2007, para. 13)

Since the beginning of his papacy, Pope Francis has advocated a missionary reform of the Church. *Evangelii Gaudium* (Pope Francis, 2013b) elucidates this vision and asserts it on the premise that, "[m]issionary outreach is paradigmatic for all the Church's activity" (para. 15). Pope Francis wrote: "each Christian and every community must discern the path that the Lord points out, but all of us are asked to obey his call to go forth from our own comfort zone to reach all the 'peripheries' in need of the light of the Gospel" (Pope Francis, 2013b, para. 20). He claimed that mere administration is no longer sufficient. Throughout the world, let us be "permanently in a state of mission" (para. 25). As this vision for the new evangelisation makes apparent, Catholic schools, like the rest of the Church, must become increasingly mission-driven.

2.5.2. The new evangelisation

There is a substantial body of church literature that focuses on The New Evangelisation (Pope Francis, 2013b; Pope John Paul II, 1991; Pope Paul VI, 1975) and extensive ecclesiastical

discussion over how the Catholic Church understands the New Evangelisation which is complex, interconnected, and somewhat contentious (Mellor, 2016; Sultmann & Brown, 2014). Unsurprisingly, there are various, divergent interpretations of the meaning of the New Evangelisation (Gowdie, 2017). Since the Second Vatican Council, evangelisation has remained a constant in theology as an evangelising reaction to a specific cultural situation. "What Paul VI anticipated, John Paul II started, Benedict XVI institutionalised, and Francis personified in a papal sense." (Mellor, 2016, p. 97)

On the 50th anniversary of the first evangelisation of Latin America, Pope John Paul II initially proposed the concept of the new evangelisation in Haiti. It meant that countries and communities that had previously been evangelised had lost the zeal for faith required to accept the word in a different way so as to be won back to Jesus (Porteous, 2008). In this way the Holy Father urged the Church to draw on its traditions, to recognise the complexities and requirements of today's social reality, while reiterating the essential necessity to keep Christ and the Gospel at the centre (Sultmann & Brown, 2014). It was this call upon the Church that was coined the *new evangelisation*, a new means to interpret the Gospel in light of the signs of the time. The new evangelisation is interpreted by Catholic educators as consisting of "proclaiming the Gospel anew, nurturing seeds of faith, in a context of freedom and being up front about educational and catechetical goals" (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007, p. 12). The new evangelisation means "providing an adequate reaction to the prevailing signs of the times, to the demands of modern individuals and groups, and to the emerging sectors with their respective cultures through which we express our identity and the purpose of our existence" (Synod of Bishops XIII Ordinary General Assembly, 2012, para. 164).

The missionary transformation for which Pope Francis has relentlessly called (Pope Francis, 2013b) grounds this transformation on a call to action and follows the assertion from Pope John Paul II that everyone has a right to the encounter with Christ. "The New

Evangelisation is an invitation to an encounter with Jesus Christ and his bride, the Catholic Church" (Costelloe, 2009). To avoid creating a false contradiction between spirituality and religion, this encounter with Christ takes place in and through the Church (McGrath, 2014). This implies that the process of evangelisation can take place through and within each individual. For Pope John Paul II, the proclamation of Christ was central:

> the new evangelisation begins with the clear and emphatic proclamation of the Gospel, which is directed to every person. Therefore, it is necessary to awaken again in believers a full relationship with Christ, mankind's only Saviour. Only from a personal relationship with Jesus can an effective evangelization develop.   (John Paul II, 2006)

The Church's updated vision of mission is where the New Evangelisation concept originates. New responses have been produced as a result of the fact that ordained missionaries no longer hold the sole responsibility for mission (Connolly, 2015). The necessity for a New Evangelisation, which stems from a different understanding of mission, was highlighted by Pope John Paul II (Bevans, 2014). This holistic understanding of the Church's mission and evangelisation was rediscovered by the Second Vatican Council when addressing the nexus between the modern society and the Catholic Church (Dumais, 2014). The teachings of the Second Vatican Council (1962 and 1965), aimed to confront the many issues of the twentieth century. It was these very challenges that gave rise to the idea of the New Evangelisation.

This recontextualization of the gospel message is another way to conceive the New Evangelisation by re-presenting or re-proposing the Gospel in light of fresh circumstances (Pope John Paul II, 1991) and as such the Good News' vitality and the New Evangelisation go hand in hand. The Church's newfound passion for sharing the Christian message can also be seen as part of the New Evangelisation (Green, 2018). This recontextualisation needs also to be considered with the changing demographics. Due to growing enrolment in Catholic schools and a reduction in teaching clerics, lay teachers had taken the position of clergy and

religious by the 1960s (O'Donoghue, 2017; Singleton, 2014). Following the Second Vatican Council, the ecclesial function of the laity became more widely understood and accepted (McLaughlin, 2008; O'Donoghue, 2017).

Given these changes, lay educators are now in charge of leading contemporary Australian Catholic education. Due to this, it is expected of these mostly lay leaders and teachers—regardless of their identification with a particular religion— to uphold Catholic beliefs and practises and engage in continued formation (Rymarz, 2012). The tenuous relationship many of these leaders and teachers have with Catholicism proves this expectation to be ironic (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007). Australian Catholic schools, according to Catholic educational and clerical authorities, should serve as hubs for the New Evangelisation. Additionally, teachers at Catholic schools are supposed to act as New Evangelisation agents (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007). There is a dearth of study on teachers' comprehension of the New Evangelisation, making it unclear how this expectation is to be put into practise. Although the Church continues to place a high priority on the New Evangelization being implemented by educators in Australian Catholic schools as a way to re-engage Catholics, the idea is still up for debate.

2.5.3. The role of lay staff in the new evangelisation

The job of religious lay teacher and leader is complicated, not only because of systemic accountability and current pedagogies, but also due to the fact that these educators and leaders have been given much responsibility of the evangelising mission of Catholic schools. Catholic school teachers and leaders in Australia are expected to take part in opportunities for faith formation on both an individual and systemic level (Gowdie, 2011; Neidhart & Lamb, 2016) as their work will determine if the Catholic school reaches its goals. This demonstrates the reality that school staff "who truly live their faith will be agents of a new evangelisation in

creating a positive climate for the Christian faith to grow and in spiritually nourishing the students entrusted to their care" (NCEC, 2017, p. 6). However, the religious backgrounds of educators in Catholic schools in Australia are not uniform. In fact, not all of the teachers working in Catholic secondary schools are Catholic. In NSW, In Catholic secondary schools, 27% of the teaching staff are not Catholic (Catholic Education Commission New South Wales, 2011). Moreover, laypeople make up the majority of the faculty in Catholic secondary schools.

Barnes (2005) cautioned that such a difficult endeavour necessitated a sophisticated approach, because to "interact with the beliefs and values of pupils necessarily requires a dialogical and dialectical form of religious education where different viewpoints, those of pupils and teachers are shared, debated and their implications explored openly, respectfully and honestly" (p. 5). The Catholic Church places laymen and women into this setting. Secondary school teachers face not only the issues of enculturation deficits in their students, but also the difficulties educators have in helping young people handle their encounters with authority more generally. Olson (2014) notes that "[a]dolescents, along with going through significant psychological, biological, and sociological changes, also experience important developmental milestones in regards to faith" (p. 17). In Catholic schools, lay teachers and leaders must not only be experts in their subject area's content, but also in pedagogical tactics to improve student learning. They must also devise genuine and efficient strategies for evangelising students to the Catholic faith. The importance of lay leaders in this evangelising mission of the Church is underscored in light of the context of faith, leadership and contextual changes.

Weddell's (2012) study explores questions of evangelisation in terms of stages and thresholds, and reveals data regarding Catholicism that found "[o]nly 30 per cent of Americans who were raised Catholic are still 'practicing'" (p. 24). However, the study also shows that "[n]early a third of self-identified Catholics believe in an impersonal God" and

that "only 48 per cent of Catholics were absolutely certain that the God they believed in was a God with whom they could have a personal relationship" (p. 43–44). Weddell's study questions the need for a personal relationship with Christ; it is relevant, as this is a precondition of self that is necessary for one to then evangelise.

Theological literacy, defined as the religious beliefs and practises of Catholic school leaders, was found to be of great value for lay staff who answered the call to leadership in Catholic schools in a survey of secondary schools in the United States (Thompson, 2011). The study found that this is a worse problem than the decline of religious clergy and teachers in Catholic schools, and that such leaders need to be well-versed in Catholic faith and aligned with Catholic Church doctrines. While Thompson specially identifies the role of principal in his study, this finding has relevance here as those principals have moved through middle leadership, as suggested earlier; the evangelising role of middle leadership in Catholic schools is a topic of limited research.

"Religious education has a proper evangelising character" (Congregation for the Clergy, 1997, para. 73) and is a means through which evangelisation can take place. It has the potential to have a tremendous impact on the formation of young people's identities and the construction of meaning (Crawford & Rossiter, 2006). The Catholic school has a tremendous potential to serve as a resource for creating meaning through its religious instruction (Hack, 2011). Evangelisation can take place in many ways, both within and outside the classroom. According to McGrath (2014), the new evangelism includes both the deliberate religious education programme implemented in the classroom and the more covert religious education programme experienced in the school's culture and ethos. There is a clear role here for teacher in the evangelising mission of the Catholic school. Every Catholic school employee is called to ministry because of the distinctive ways that they each contribute to the religious education programme, the religious component of the curriculum, the school's religious life,

and the religious culture that is reflected in its structures, processes, and systems on a personal and collective level (Sultmann & Brown, 2019).

O'Loughlin (2007) asserts that "as a basic attitude we need to be friends and pilgrims in our common humanity with the people of our time and we need to have respect for them and their belief" (p. 412). This speaks to the role leaders play in the evangelising role of the Catholic school. D'Orsa (2010) argues that, as agents of new evangelisation, Catholic educators, particularly leaders, must befriend culture, and Catholic educators cannot afford to be indifferent to or disconnected from context. In the face of globalisation, secularisation and pluralisation, leaders must assist their pupils in finding meaning and purpose (D'Orsa, 2010). Middle leaders in Catholic secondary schools, therefore, operate from their own faith understanding and from their own cultural context, which raises the possibility of queries on the effectiveness of evangelisation in Catholic schools. As agents of the new evangelisation, Catholic schools have improved their mission agility and intentionality, as well as their readiness to befriend Catholic tradition and context (McGrath, 2014). How middle leaders are formed and grown in their own faith can add to this mission of intentionality and agility, and may potentially ensure the success (or otherwise) of mission and evangelisation.

This highlights the role of lay teachers and leaders where their contact with parish is declining. Seminarian perspectives on Catholic schools and the new evangelisation in the United States was the subject of research (Simonds et al., 2017) in which seminarians were found to have reinterpreted the meaning of the new evangelisation. For this group of 14 seminarians, evangelisation meant finding more effective methods to spread the Gospel's timeless message rather than being driven by a new programme with set methods and objectives. All seminarians agreed that Catholic schools are crucial for the future of the Church and that six or eight years of spending more time with students in a Catholic school could have a greater impact on their development of their faith than just one or two hours per

week in parish religious education. This reinforces the importance impact lay teachers and leaders can have on the evangelisation of those with whom they work in Catholic schools.

In Catholic schools, lay teachers and leaders play a pivotal role in the Church's evangelisation effort. Catholic schools exist in Australia because of the Catholic faith heritage (Carr, 2014). Nearly 764,000 pupils attended 1729 Catholic schools in 2015, and nearly 52,000 Catholic teachers were employed (National Catholic Education Commission, 2016). The work of the lay teacher is crucial, and it is growing more demanding in the face of a changing social milieu that is moving towards a widely materialistic and secular society along with a lack a consensus among teachers on a specific interpretation of the New Evangelisation. Furthermore, little research has been conducted on how educators understand the New Evangelisation. Given both this importance and challenge, there needs to be further exploration of how lay middle leaders charged with this evangelising mission are appropriately formed to carry out this important work of the Church.

2.6. Formation for mission

2.6.1. Formation

Sultmann et al. (2022) indicate that an "intuitive view of formation brings forth an array of perspectives; so much so that it is difficult to find a starting point and that formation means different things for different people" (p. 22). The term *formation* is complex, unique and shrouded in ambiguity. Although *Pastores Dabo Vobis* (Pope John Paul II, 1992) names four dimensions of development on priestly formation (human, spiritual, intellectual and pastoral), it does not define it. *Co-workers in the Vineyard of the Lord for Ecclesial Lay Ministries (*United States Conference of Catholic Bishops, 200*5)* proposes the same four dimensions without defining them. Thornber (2012) defines *formation* as "a reflected development on one's gifts and how the gifts contribute to the need in providing an holistic preparation of a

person for a role – human, spiritual, intellectual, pastoral" (p. 43). For the purposes of this research, Sultmann and Brown (2014) provide a coherent definition of *formation* as characterised in the life of the spirit, defined as the discipline of constant renewal. In this context, *formation* refers to the practises of individual and group reflection that integrate tradition, the signs of the times, and faith into one's and a community's daily existence. This resonates with Pope Francis' call to educate to promote both human and spiritual growth.

As Catholic schools continue to find ways to remain authentically Catholic, the role of school staff to embed culture, ethos and mission is increasingly significant. For Catholic school administrators, ongoing formation for mission for lay educators has been seen as critical (Cho, 2012). Christian faith formation is a "lifelong process of seeking, clarifying, deepening, and raising awareness of what it means to be truly human in light of the graced nature of creation" (O'Leary, 2008, p. 73). Coll (2009b) sees formation as critical, as the faith development for children has "shifted from the family and parish to the school so much so that the future of the Church passes by way of its schools" (p. 144). It may be argued that teachers are called to introduce faith rather than cultivate one already present. As a result, religious staff formation is essential to the Catholic school's ability to carry out its mission effectively.

The findings of a national religious education colloquium (Hall & Sultmann, 2018) validated the interactive elements of teacher identity and highlighted the importance of formation, pedagogy, curriculum and partnerships. While there was a focus on religious education, it can be argued that the conclusions are equally applicable to all staff in Catholic schools. Sultmann and Brown (2019) conclude that formation is centred on relationships that are in line with the school's objective and are essential to life and living. A Catholic Christian understanding of formation is described by Sultmann et al. (2022) as:

> ... the radical and fundamental work of the Spirit. It is organic (it happens where it happens); it is dynamic (develops and expands in unpredictable

ways); it interacts (each of its parts influences the other parts); and it is a work of the Spirit (it is an experience within the Providence and Mystery of God). A summative perspective would suggest that it is about starting where you are, and continually moving forward and being transformed (being and becoming); engaging the whole self (head, heart and hand); recognising connectedness in relation to the whole (personal, social, professional and communal); being influenced by context and tradition (community and story); and Paschal in nature (living, dying and rising) which unfolds formally and informally in the ordinary and the every-day Mystery and mission of God at work in the world. (p. 24)

Formation is a process that the Congregation for Catholic Education sees "as the key initiative to the maintenance of authentic Catholic schools" (Congregation for Catholic Education, 2007, para. 21). It is the provision of learning experiences which nurture personal transformation in advancing the mission of God in the world. *Formation* within Catholic Education is defined as:

> … an intentional, ongoing and reflective process that focuses on the growth of individuals and communities from their lived experiences, in spiritual awareness, theological understanding, vocational motivation and capabilities for mission and service in the Church and the world. (National Catholic Education Commission, 2017, p. 9)

Formation, as a means to ensure the authenticity of Catholic schools, can therefore be viewed in terms of school leadership generally, within the context of the Church, with regard to faith, improving pedagogy, staff professional learning and, with specific reference for this study, within Catholic school middle leadership.

2.6.2. Formation for mission and Catholic school leadership

When contemplating the Church's mission and the centrality of formation, the difficulty of formation in Catholic education is not so much a decision about what to keep and what to delete. Rather, "the challenge is to consider how we might witness to the depth of the Catholic

Tradition in ways that are open to new and emerging contexts" (Sultmann et al., 2022, p. 30).

Grace (2000) identifies the difficulties of lay leaders within the traditional formation models:

> in a society increasingly marked by secularism, consumerism and market forces, the need for strong spiritual leadership in Catholic schools is very clear. But it is a daunting challenge. The Vatican document of 1982, *Lay Catholics in Schools: Witnesses to Faith*, presented some high aspirations when it said that 'the Catholic educator must be a source of spiritual inspiration'. Being a personal faith witness is one thing but being a source of spiritual inspiration is quite another. Many professional and highly competent teachers may feel less confident of leading in this area and articulating persuasively the fundamental spiritual purposes. (Grace, 2000, p. 16)

The difficulties of Catholic school leadership (including current middle leaders), as suggested by Grace (2000) above, indicate a reason why fewer lay teachers aspire to middle or executive leadership, and they identify issues they see with traditional formation models. "Formation of leaders is important as leaders concern themselves with the symbolic, the imagined, the future, they focus on inspiring vision, developing a culture, addressing change and facing both the future and the outside world" (Coll, 2009b, p. 156). While persons in positions of leadership responsibility may not always be able to explain the essence of spiritual leadership, the literature appears to imply that they lack confidence in this area of leadership.

This view somewhat resonates with that of Fincham (2010) in the sense that he asserted that Catholic schools suffer a leadership succession dilemma. Catholic leaders, in particular, should go through a continuous process of faith development and growth. Gallagher (2007) recognised the difficulty Catholic schools have in fostering and assisting teachers who want to hold leadership positions within the Catholic culture, noting that some leaders find it difficult to describe what such a faith dimension means and implies. When asked to explain the sources of their faith, the spiritual foundations on which their school

leadership is based, principals reacted with both inclusion and invitation, according to Flintham's Australian and English studies from 2007 that demonstrate a comparable cogency.

Shields (2018) pointed to the need for formation, especially in the new generations as they come to Catholic schools in today's post-modern, millennial, mass-mediated culture. Because these new generations of leaders were raised in "an atmosphere of suspicion towards authority, uncertainty about institutions, multicultural richness, and religious homelessness," (Shields, 2018, p. 162) the understanding of the Catholic religion among these new generations of leaders seems to be conflicted and confused. While some are devout Catholics who actively practise their faith, others have a more casual relationship with the Church. As such, given the contours of change as articulated by Shields, the traditional patterns of formation through involvement with the Church have – and are – undergoing change, which has implications for Catholic school leadership.

2.6.3. Formation for mission and Church participation

A crucial built-in construct for laypeople's formative development has long been viewed as weekly mass attendance and parish participation (Dixon, 2005). Yet, despite this reality, weekly mass attendance rates have decreased. Mass attendance, which reached a high point within the Catholic population of up to 75 per cent in the 1950s, is predicted to drop from its current 12 per cent to approximately 5–6 per cent by 2030 (Dixon, 2017). Future leaders of Catholic schools are immersed in the post-modern world in which they belong, and this presents challenges for the future of Catholic schools. Of concern is the research of Hughes (2008), which found that many of those who are entering Catholic schools in the teaching ranks do not personally endorse the Catholic Church's teachings on significant issues. Assuming that conventional processes of formation connected with structured Church participation still exist is crucial in the context of the research problem.

Formation helps Catholic educators develop the religious and spiritual capital they need to keep their sense of mission and hope alive in their profession (Grace, 2010). Given the change in staffing from religious to lay, there needs to be a change in the way religious formation takes place. In the past, the purpose of formation programs were designed and delivered to prepare clerics and religious to run the ministries effectively and efficiently, and to exercise canonical responsibility over them; in other words, to ensure that the ministries were Catholic in the legal authoritative sense (Thornber & Gaffney, 2012). A "business as usual" attitude is no longer effective in local Church life, which is the main concern driving the new evangelisation (D'Orsa & D'Orsa, 2012). The necessity for strong, organic and complete formation program to develop the faith of lay Catholic educators has long been emphasised in Apostolic Exhortations (Graham, 2011). In order to develop the faith of lay educators, formation must be a component of and a supplement to professional learning and experience for Catholic school teachers. (Congregation for Catholic Education, 1982). Formation is beyond training or professional education. The purpose of such formation is:

> …personal sanctification and apostolic mission, two inseparable elements in a Christian vocation. It requires a human and well-rounded formation, as well as a formation in spirituality and doctrine. (Congregation for Catholic Education, 1982, n. 65)

2.6.4. Formation for mission and faith development

In Catholic education, the formation for mission and faith development of Catholic school leaders are crucial. Sultmann et al. (2022) point out that such formation "goes beyond the reading of a good book, attending a relevant course, digesting a scholarly article, discussing ethical issues, engaging in good works ... or engaging with a blog from a learned presenter" (p. 32). A perceived absence of theological understanding to underpin Catholic school leaders' formation for mission was identified as a "failure to assist their ongoing religious growth" (Belmonte et al., 2006); and leaders expressed a desire for improved individual

growth in vision and faith, but were dissatisfied with the limited resources to do so. These findings, which present a challenge to Catholic leaders, are in line with other Australian studies (Duignan, 2004; Duignan et al., 2003; Flintham, 2007). This would indicate that faith development and professional learning, particularly in the Catholic context in the area of formation for mission and theological understanding, is critical.

Formation is especially crucial when a lay professional staff includes non-Catholic members or if the staff is Catholic but has not had the opportunity to learn about the Catholic educational heritage (Hunt, 2005). Formation for teachers and leaders is necessary given "teaching is a calling that requires constant renewal of mind, heart and spirit" (Jackson & Jackson, 2002, p. 285). It is concerned with "integrating heart, spirit and community into the fabric of school life" (Kessler, 2002, p. 145). Being formed is the process of bringing the soul and role together in life to foster a relationship that enables the growth of the community and one's genuine self (Palmer, 2004).

The research of Lipscombe et al. (2021), from an educational perspective, suggests that existing professional learning and research on middle leaders are insufficient to prepare those leaders for the challenges they face. If that is the case, then it may be claimed that there is a lack of research in the literature, specifically on the formation of middle leaders. One pivotal study on middle leaders was about the teachers' perspectives on the advantage and disadvantages of attaining middle leadership positions (Fletcher-Campbell, 2003); however, the study did not consider middle leadership formation. Southworth (2002) considers how middle leaders developed into leadership roles and concludes that most school leaders had learnt most about leadership practice by on-the-job training and hands-on experience. Although there are elements of middle leadership development in each of these studies, they do not address the manner in which middle leaders are formed for mission, nor do they consider the personal faith component that is necessary for such leadership. For instance, the purpose of the Catholic school is clearly defined in the Queensland Catholic Education

Commission's policy statement *Formation for personnel in Catholic schools in Queensland* (2010). This approach is noteworthy in that it places a greater emphasis on formative opportunities rather than accreditation activities and postgraduate qualifications. The Policy states,

> all Catholic school authorities will ensure that all staff members participate in formation experiences to assist them to grow in understanding their ministry as part of the mission of the Catholic Church.   (Queensland Catholic Education Commission, 2010)

Personal faith contexts must be considered, as well as how formation opportunities might benefit people in positions of leadership. Personal renewal starts with paying attention to one's inner self and giving one's own unique witness to the ideals found in the Gospel. This involves "a radical conversion, a profound change of mind and heart" (Pope Paul Vl, 1975, n. 10). Formation, at a personal faith level, has the same goal of living out the Gospel values. Furthermore, it presupposes and fosters a divine connection, which prioritises prayer in addition to seeking a feeling of the divine through reflective conversation. This contact with the divine highlights the importance of prayer as "a means of believing" and forges a vital connection across different spiritual pathways (Sultmann & Brown, 2014, p. 11).

2.6.5. Formation for mission to improve pedagogy

> To educate is an act of love … the educator in Catholic schools must be, first and foremost, competent and qualified but, at the same time, someone who is rich in humanity and capable of being with young people in a style of pedagogy that promotes human and spiritual growth.   (Pope Francis, 2014)

The role of middle leaders is pedagogical, pastoral and evangelising. Professional learning and formation, both career-long and complex, is "the sum of all activities both formal and informal carried out by the individual or system to promote staff growth and renewal" (Connors, 1991). Crowther (2010) has done much work within Australian schools, with a particular emphasis on leadership. He promotes the concept of parallel leadership and

capacity building in schools, and identifies six dynamics of capacity building. Crowther contends that teachers can be identified as the key and prime factor in affecting change at the classroom level. Crowther's evidence also highlights the importance of professional learning in professional revitalisation, and that success breeds success. The significance of school leader formation for their mission and its impact on student learning has received little attention. In this area of school leadership, research and evaluation activities are still small. (Anderson et al., 2007).

What is offered to school leaders in terms of professional learning and formation for mission is critical. It would be easy to adopt an old-fashioned model of formation. Beckett (2009) speaks of the experience many years of the novice, standing alongside the expert, learning the skills through observation, modification, replication and repetition. However, education is far more relational (Branson et al., 2019; Buchanan et al., 2021). Shield (2008) also thinks that a collaborative and engaging approach to professional development and in-service training should be used by Catholics, convey a high regard for competence while also providing a compelling sense of direction. The teaching of religion will be aided by professional learning that is influenced by the school's vision as a faith community; it will also create knowledge of the benefits and drawbacks of the triad of school, family, and Church; enhance communication with the parish and parents; improve students' understanding (Shield, 2008).

Robinson et al. (2008) elucidate the ways in which educational leaders affect various student outcomes, which has sparked remarkable international attention. The literature suggests different points of view with respect to the impact that those in positions of responsibility have on student outcomes. Despite the fact that principals have a significant influence on pupils' academic progress (Robinson, 2007), middle leaders have the potential to positively impact school improvement (Bryant, 2019); and there is now consensus that school leadership, in its many forms, is one of the most significant factors affecting students'

learning (Bassett, 2016; Leithwood, 2004). Of note is the meta-analysis by Marzano et al. (2005), which shows a moderately strong effect of school leadership on student outcomes. This is supported by the research of Hattie (2009) regarding the influence school leaders have on student learning. This then raises the question of the importance of middle leaders. Of particular note for this study is the realisation of Shields (2018) when he states, "Of course … vocation is not something that can be managed by a program or instilled by workshops" (p. 169). This, in turn, raises the question of how fruitful formation programs and, consequently, any accreditation process could be. This is of relevance to the research problem as it seeks to understand how middle leaders feel equipped to carry out the ecclesial responsibilities as expected by the Church.

2.6.6. Formation for mission and professional learning

Within Catholic education, there is the possibility for schooling to boost individual growth, allowing the human spirit to build a loving community and revitalise culture. Huber (2009) asserts that school administrators sometimes are overwhelmed by the immensity of professional development that needs to take place for all involved in education. Within Catholic education "there is a well-established commitment to ongoing professional development among Catholic school teachers, generously supported by diocesan education offices and congregations" (Benjamin, 2010, p. 151). Catholic schools must consider a person's physical, intellectual, vocational, social, emotional, artistic, moral, and religious aspects because of their special character, which aspires to develop the full, integrated person (Flynn & Mok, 2002). Those working in Catholic education ministry must also be developed in the distinctiveness of the mission of Catholic education, which necessitates an equivalent religious formation to their general, cultural and, most significantly, professional formation. Miller agrees, noting that in order to effectively carry on the educational legacy of the Church, lay teachers in Catholic schools require religious formation on par with their

professional training (Miller, 2006, as cited by Grace, 2010). This calls into doubt whether contemporary Catholic laypeople in Catholic schools receive the same extended and in-depth religious formation for mission as their forebearers.

To respond to this challenge, the Succession Project (Queensland Catholic Education Commission, 2005), commissioned by the Queensland Catholic Education Commission, had formation for mission as one of its specific research projects. Significant barriers to leadership succession were discovered in Queensland's Catholic schools, and as a result of the study, a unit for evangelisation and spiritual development was established. Sydney Catholic schools did something similar in appointing a Director of Religious Education and Evangelisation in 2006.

Professional learning and leadership formation programs aim to develop leadership skills, and enhance self-confidence and self-perception of leadership ability. Cress et al. (2001) found that those who had participated in leadership formation programs reported a much greater understanding of self, as well as the ability to set goals, clarify their values and take risks. For middle leaders, engagement in professional learning experiences in the workplace may help them recognise their own potential to take on further leadership roles.

2.6.7. Formation for mission leadership programs and opportunities

Sultmann and Brown (2014) offer a cogent definition of formation as the discipline of ongoing renewal. In this sense, the term "formation" refers to the practises of individual and communal thought that incorporate tradition, contemporary cultural cues and a recognition of the signs of the time, and how faith might be integrated into daily life. A commitment to continuous formation for mission for lay educators has been viewed as essential by Catholic school administrators (Cho, 2012). The importance of formation leadership programs and opportunities is highlighted by the reality that the transmission of faith has "shifted from the family and parish to the school so much so that the future of the Church passes through its

schools" (Coll, 2009b, p. 144), and as such continuous and ongoing formation can be viewed as crucial to the Catholic school's ability to successfully carry out its mission and purpose.

An organic and new approach to formation for mission leadership programs and opportunities is necessary as has been emphasised in Apostolic Exhortations (Graham, 2011). The challenge is to consider how we might share the richness of the Catholic tradition while being receptive to new and developing settings. This is noted by Sultmann et al. who understand formation as "continually moving forward', "engaging the whole self", and by "being influenced by context and tradition" (2022, p. 24). In today's post-modern, millennial, mass-mediated culture, Shields (2018) highlighted the necessity for formation, particularly in the new generations, as they engage in Catholic schools. While some teachers and leaders actively exercise their faith as devoted Catholics, others have a more ambivalent connection with the Church. As a result, the traditional patterns of formation through interaction with the Church have undergone change which have implications for those in leadership roles in Catholic schools.

The study by Hughes (2008), which discovered that many people joining Catholic schools in the teaching ranks do not personally embrace the teachings of the Catholic Church on important topics, is of notable concern. It is essential to the setting of this research problem that traditional formation processes associated with formal Church participation continue to exist. Weekly attendance at mass and parish involvement (Dixon, 2005) have long been seen as vital built-in constructs for laypeople's formative growth, as was highlighted in 2.6.3. This would suggest that the importance of faith growth and professional learning, especially in the Catholic setting in the areas of formation for mission and theological understanding, are essential. This can be seen as even more profound and especially important when a lay professional staff includes non-Catholic individuals (Hunt, 2005). Such formation for mission, however, as noted by Sultmann et al. (2022), goes beyond reading of a good book or attending a relevant course.

From an educational standpoint, the research of Lipscombe et al. (2021) reveals that current professional development and research on middle leaders are insufficient to adequately prepare those leaders for the issues they encounter. If that is the case, it could be argued that there is a further gap in the literature on the research pertaining to formation for mission leadership of these same middle leaders in a Catholic school context. A critical mass of educators with knowledge of the mission of the school and, by extension, the Church, is required. Middle leaders have pedagogical, pastoral, and evangelising responsibilities and the professional development provided to school leaders is crucial as is the relational nature of formation for mission leadership programs and opportunities offered to middle leaders (Branson et al., 2019; Buchanan et al., 2021). Despite a number of programs of formation for mission leadership that are available, the issue that underpins this research is the degree of congruence between expectations of the Church and those of the middle leaders.

2.6.8. Formation for mission and middle leadership

School leadership, professional learning and school improvement continue to be put under intense scrutiny. The impact of middle leadership has generated great interest, with claims that middle leaders influence school improvement (Bryant, 2019). There is now consensus that school leadership, in its many forms, is one of the key factors affecting how well students learn (Bassett, 2016; Leithwood, 2004). Hattie (2009) and Leithwood et al. (2006) assert that this is most apparent in the influence school leaders have on their teachers, who themselves have the most influence on learning in the classroom. It then stands to reason that the formation for mission and professional learning of leaders and those aspiring to leadership have a direct influence on student outcomes and will lead to overall school improvement. Learning is largely concerned with discovering the meaning of life and how to go about living it. "As such, it is arguable that the most important dimension of learning is that of learning

about being human in such a way that we learn how to think about the meaning of life of who we are as humans" (Brook, 2009, p. 57).

Learning, in its own right can, therefore, be seen as formation. Any program of professional learning in a Catholic school needs to, in part, focus on formation. The meta-analysis of Robinson (2007) drew on 24 studies, showed connections between leadership and academic results. These resulted in the identification of five dimensions of leadership practices that could, to a greater or lesser degree, have an impact on student learning. It should come as no surprise that encouraging and taking part in teachers' professional growth is a key component of this dimension.

Cook (2008) identifies a number of leadership challenges for Catholic leaders. Catholic schools must first and foremost be schools before they can be anything else. Catholic is an adjective, not a noun, so in order to be good Catholic schools they must first be good schools. Cook (2008) further stated that school leaders are being more deliberate in creating their Catholic ethos and culture, and they believe that schools must provide quality assurance that they are carrying out their religious mission. Some schools and systems are putting in place mechanisms and procedures to assess and ensure their Catholic character. Fincham (2010) describes the ability of Catholic education to challenge secular values that saturate society as a whole, as a distinguishing feature. Interestingly, he also goes on to talk about "market culture and the fact that Catholic school teachers (and leaders) challenge to uphold spiritual values in a culture of league tables" (2010, p. 70). This, again, points to a reality that Catholic schools have to be good schools, but the whole culture of the school needs to be imbued with those values found in the Gospels.

Leaders are becoming more purposeful about hiring for mission to solve formation for mission challenges. According to Walbank (2012), a Catholic school's fundamental responsibility is to offer educational programmes that can communicate Catholicism's essential tenets and devotions, and fulfilling this duty is a non-negotiable duty. Hiring for

mission could then be described as mission critical. The need for a critical mass of teachers who have an understanding of the mission of the school, and indeed the Church, is necessary. The need for teachers with spiritual capital is essential. Grace (2010) states:

> spiritual capital can be a source of empowerment because it provides a transcendent impulse which can guide judgement and action in the mundane world. Those within education whose formation has involved the acquisition of spiritual capital do not simply act as professionals but as professionals and witnesses. (Grace, 2010, p. 119)

Formation for mission at its best seeks transformation of participants in ways that support understanding and witness within the life, culture and mission of the Catholic school (Sultmann et al., 2022). To ensure the legitimacy of Catholic schools, formation for mission can be viewed in terms of school leadership, within the context of the Church generally, with regards to faith, pedagogy, professional learning and middle leadership. The problem underpinning this research concerns the level of congruence between expectations of the Church and that of middle leaders, despite the considerable programs of formation for mission that are on offer.

2.7. Impact of middle leaders' self-efficacy

2.7.1. Professional identity

The literature on teacher professionalism and the literature on teacher professional identity are closely related (Mockler, 2011). Despite the fact that the area is expanding, The definition of the phrase is not widely agreed upon (Canrinus, 2011; Mockler, 2011). in fact, many academics who write about professional identity assume that the phrase is self-explanatory (Beijaard, Meijer, & Verloop, 2004). According to Canrinus (2011), professional identity is defined as teachers' (and leaders') perception of "the teacher they wish to become," and it is intimately linked to personal identity (Beijaard et al., 2004; Monteiro, 2015). Casanova-

Fernández et al. (2022) purport that the construction that takes place throughout the course of a teacher's career is viewed as the development of their professional identity. With regard to learning and teaching, the roles they perform, and their objectives and aims with respect to ethics and professionalism, it is a "continuous process of the idea and the image that teachers develop for themselves" (p. 2).

A number of studies have investigated how self-belief contributes to the development of leadership. Self-belief, encompassing the notions of self-efficacy, "the acceptance of one's potency, competence and capacity to make a difference to organisational outcomes," and self-esteem, or the belief in one's own value and worth, are crucial precondition for achieving leadership (Gronn, 1999, p. 36). The degree of self-efficacy and self-confidence, which is its precursor, have been discussed as inhibitors or moderators for taking up school leadership in other research.

Lack of confidence among middle leaders may prevent them from taking on a leadership position and seeking further leadership development (Fletcher-Campbell, 2003). Middle leaders indicated uncertainty about their ability to manage some of the responsibilities anticipated were they to be promoted in leadership (Fletcher-Campbell, 2003). According to Cubillo and Brown (2003). Fear of failure and unfamiliarity with the environment are the underlying reasons of this lack of confidence. Given that the traditional patterns of inculcation of faith have changed (see Section 2.8.3) this calls into question whether middle leaders in Catholic schools lack confidence in their religious formation for mission and the impact this has on their professional identity and willingness to lead for mission.

High levels of self-confidence have been found to be a primary motivator for teachers that are interested in leadership positions in schools, and similarly low levels of self-confidence serve as a deterrent to such aspirations (Gronn & Lacey, 2004; McKenzie et al., 2014). In a study of aspiring school leaders, Gronn and Lacey (2004) discovered that the most

crucial determinant in their decision to accept a leadership role was their level of self-belief and confidence in their capacity to carry out the job. Middle leaders acknowledged the importance of having confidence, ambition, and people skills in spotting leadership potential (Rhodes & Brundrett, 2006). Rhodes et al. (2009) purport, "self-belief and self-confidence must be fostered at all stages of the leadership journey" (p. 463). These findings demonstrated the value of comprehending how teachers gain the self-assurance necessary to assume leadership roles. Before self-confidence, self-efficacy is seen as a mediating factor in the goal of becoming a school leader (Gronn, 1999; Gronn & Lacey, 2004).

Professional identity is a projection of the self, and because it depicts an ideal of what teachers aspire to be, it is strongly related to teachers' ideas about the model teacher. There are parallels between this and Bandura's (1997) theory of self-efficacy. As stated by Bandura (1994), self-efficacy is "people's beliefs about their capacities to generate specified levels of performance that exercise influence over events that affect their lives" (p. 78).

2.7.2. Middle Leader self-efficacy

Persistence in applying for leadership positions is positively correlated with high self-efficacy for leadership (McCormick et al., 2002). A significant body of research linking success to self-efficacy supports this (Bandura, 1997; Phan, 2010). Since studies show that low self-efficacy for leadership results in disengagement with the leadership paths, it is crucial for leaders to develop strong levels of self-esteem and self-efficacy. (McKenzie et al., 2014; Rhodes, 2012). These findings suggest that having a high level of self-efficacy for leadership may play a key role in shaping desires for leadership.

According to Bandura, self-efficacy is "focused not with the amount of abilities you have, but with what you believe you can do with what you have under a range of conditions" (1997, p. 37). A set of beliefs known as self-efficacy promotes motivation because they are a dynamically generated collection of sub-skills that shape perceptions of behaviour. Depending

on how they see their own efficacy, It is possible for one person to perform extraordinarily, adequately or insufficiently, according to the circumstances or another person with the same skills, according to Bandura (1997, p. 37).

Self-efficacy can be assessed on three different dimensions (Bandura, 1997). The initial factor is the strength or degree of self-efficacy. In this context, a person may assess their capacity up to a specific level of complexity or challenge. The second factor is how broadly people hold efficacy beliefs. Some people might think they are very effective at a variety of goal-directed behaviours across a variety of domains. Strength is the third measure that self-efficacy beliefs can be evaluated on. Having strong self-efficacy beliefs can help motivate in the face of failure in the past, overcome adversity, and being resilient (Bandura, 1997).

2.7.3. Self-efficacy beliefs

Four sources of self-efficacy were identified by Bandura (1997): Enactive mastery experiences (reflection and experience upon successful achievement of goal), vicarious experiences (how self-efficacy may be impacted by behavioural model observation), verbal persuasion (improved self-efficacy beliefs through affirmation and criticism of illogical thinking) and physiological and emotional arousal *(*which is typically felt in a circumstance that has an adverse effect). Bandura (1997) discussed how elevated emotional states such as anxiety and fear might hinder performance and damage one's beliefs about self-efficacy.

Bandura contends that self-efficacy beliefs have a generative effect on motivation by altering behaviour, the environment, and cognition in the future in a related situation. In summary, according to Bandura, self-efficacy beliefs have the most important deterministic influence because "among the mechanisms of human agency none is more central or ubiquitous than ideas of personal efficacy" (Bandura, 2002, p. 270).

According to Bandura, a person's degree of confidence about their potential for success has a significant impact on how persistent they are in pursuing a goal. He also took into account the numerous factors that could lessen the motivation to act in a certain way in order to achieve particular outcomes. "The impact of information on efficacy expectations will depend on how it is cognitively appraised" (Bandura, 1986, p. 364). This implies whilst having effective, active mastery experiences, a person may not have improved self-efficacy beliefs due to strongly held beliefs, intense social pressure, or a disorder that hinders the mind from processing a mastery event. A person's self-efficacy beliefs might not change as a result of a mastery experience simply because they did not focus on the mastery or its advantages enough. These findings suggest that having a high level of self-efficacy for leadership may play a key role in the emergence of leadership aspirations. Personal agency and self-confidence interact and suggest a need to account for personal agency.

2.7.4. Personal agency

In evaluating Bandura's impact on the field of social psychology, Ferrari et al. (2010) observed that Bandura emphasised the importance of personal agency for motivation and behaviour, "in the fuller sense of personal agency within a social environment or cultural context that is personally meaningful and that one acts to help create" (p. 111). "Awareness of one's capacity to take control of an aspect or aspects of one's life (and, by extension, career)" is the definition of personal agency (Smith, 2011b, p. 530). Teachers, and for the purposes of this study middle leaders, who "see their professional pathways as defined by circumstances mostly external to themselves" (those who lack personal agency) are separated from those who are "self-defined" and "taking control of their lives and careers" (Smith, 2011a, p. 11).

Personal agency is the capacity of an individual to actively impose change on and exert influence over her or his surroundings. People use this kind of agency, which involves intentionality, planning, reactivity, and reflection, in many daily encounters. We cannot

always use personal power to fulfil our needs, as Bandura (2001) outlined. For school leaders, low self-confidence was highlighted as one of the core elements influencing decisions to accept leadership roles in schools. (McKenzie et al., 2014). Dorman and d'Arbon (2003) hypothesised that teachers with an absence of personal agency may emphasise certain factors more that deter leadership aspirations.

The study of Elliott (2019) pointed to the importance of self-efficacy and a Catholic school teacher's belief in their religious literacy, experience and understanding of doctrines and theology. For the purpose of this study, the impact of self-efficacy and self-confidence of middle leaders to lead for mission and how this influences leadership aspiration requires further investigation. It is crucial to comprehend how middle leaders foster professional identity, self-efficacy, personal agency and self-belief given the significant role they play in fostering formation for mission leadership. Over time, school leaders are formed through a variety of phases and factors (Busher, 2005; Gronn & Lacey, 2004).

2.8. Post-modern Australia

2.8.1. A general transition

The critical role that school leadership, particularly middle leadership, plays in achieving the Catholic school's purpose is set against the backdrop of societal changes, technological innovations and globalisation in a post-modern Australian context. The research for "Who's coming to school today?" (McQuillan, 2009) was ordered by the Catholic Education Council in the Archdiocese of Brisbane due to a perceived discrepancy between parents' perceptions of the ethos and goals of Catholic education and what they found most appealing about Catholic schools. For example, parents mentioned the school's welcoming and inclusive environment, as well as the quality of the teachers, as compelling reasons to send their children to Catholic schools. Simultaneously, the likelihood that their children would learn

about the Catholic faith, as well as Christianity and Jesus, was scored poorly. (McQuillan, 2009). The findings indicated that the parents were unaware that the elements they found most appealing about Catholic schools are intimately tied to the schools' ethos, mission and ecclesial identity.

There is a general transition taking place in Catholic schools across the world. Baby Boomer teachers, or those born between 1946 and 1964, are approaching retirement, whereas those from Generation X (those born between 1965 and 1976) are still working. Generation Y teachers (born between 1977 and 1995) have entered the workforce. Powell (2011) contends that this points again to the challenge of generational differences. Questions arise, such as: how can older generations respect the dreams, passions and visions of younger generations for the future? How do younger generations pay homage to the knowledge and vision of their forefathers and mothers? How will opinions and understandings be communicated? Behrstock and Clifford (2009) affirm that, similarly to how past generations affected teacher career paths, Generation Y teachers' expectations for their lives and work will influence how they enter and stay in the profession. Behrstock and Clifford (2009) also agree that we must realise that, like the Baby Boomers, the members of Generation Y have strong moral principles, a strong sense of community and family, and a strong desire to create a society that is more accepting and inclusive.

On one hand, senior leaders in Catholic schools are predominately the Baby Boomers and from Generation X, which include a significant number of ex-religious. On the other hand, many teachers and middle leaders are also from Generation X and also from Generation Y, and we must recognise that these middle leaders are the future senior leaders of Catholic education. Generation Y is the first post-Church generation (Rolheiser, 2008) to have grown up without having been exposed to Catholic parish culture. According to Church attendance studies, the majority of current parents and pupils have no connection to the parish or its

culture. Any Church experience is educational, and they bring their own worldview and experiences to this community (McLaughlin, 2002; Rymarz, 2004).

2.8.2. A generational disconnect?

Challenges within Catholic education have greatly contributed to an understanding of conflict and tension (Flynn, 1985, 1993; Grace, 2010; McLaughlin et al., 1996; O'Keefe & Zipfel, 2007; Sullivan, 2000, 2001). McDonough (2010) adds that in "addition to the malaise and depression that youth feel as the result of broken, corrupted and deteriorating families, there is also the problem of a general discontent that families have with the institutional juridical Church" (p. 293). McDonough (2010) points to a common trend in which Catholicism is losing relevance among today's youth, owing to their dissatisfaction with a number of its moral doctrines:

> what is evident everywhere is a high level of disenchantment with the Church by both young and middle-aged Catholics. These latter attach no great credibility to the teaching of the Church, particularly on moral issues. Hardly anyone pays attention to Church teaching on birth control, and this arguably is the reason of a lack of credibility in other areas, particularly areas of personal morality. (McDonough, 2010, p. 293).

Conflicting somewhat with what McDonough (2010) suggests, Australian research of Engebretson (2008) indicates:

> that while Australian Catholic young people positively endorse the spiritual formation that is offered to them through their Catholic schools claim belief in core Catholic teachings, they are less interested in formal religious practice, and for most their ties with the local parish are weak. Data from the National Church Life survey indicate that only 5-6% of teenagers who identify as Catholic regularly attend Sunday Mass, a fact that has led to a weakening of their identification with the local parish. (Engebretson, 2008, p. 158)

The institutionalised Church's ability to connect with the context of the contemporary individual is the major difficulty in all of the above. Younger generations see God "as a

distant figure" (Rymarz, 2010, p. 86). This emphasises and confirms the disparity between many young people's perspectives and conventional Christian beliefs. It is this disconnect with the Church that has led to the limited connections that young people have with their parishes.

The experiences of the Gen Y, Gen X and Baby Boomers with the Church, religion and society are all unique (Beare, 2003). Although many members of the Baby Boomer generation are growing more distant from the Church, many still have Catholic memories from their formative years spent in parish life. Fasting, blessing and devotional activities are important experiential indicators for Gen X, but they have little understanding of or connection to a pre-Vatican II Catholic culture (Rymarz, 2004). Furthermore, data on Church attendance shows that the majority of present parents and pupils have little connection to the parish or its culture. For Generation X and Generation Y, any Church experiences are related to their educational experiences, and faith is communicated in personal and informal ways. Furthermore, the need to be contextualised, giving note to the impacts of the Royal Commission which are yet to be fully realised. Sultmann and Lamb (2020) in a draft report to the National Catholic Education Commission, *Learning in a Formative Space,* revealed that the "impact and revelations from the Royal Commission into Institutional Responses to Child Sexual Abuse, together with the public debate on the legal status of same-sex relationships, and an increasing fear of terrorism often aligned with faith-based communities, leads commentators to ask the question within the public media: 'what will it mean when God is dead?' (Sultmann & Lamb, 2020, p. 26)". Disaffection with the Catholic Church is both tangible and real.

Parish participation and weekly mass attendance have long been seen as a key built-in formative component for persons of the Catholic faith (Dixon et al., 2007). Interestingly, Dixon et al. (2007) also identify the additional trend of Catholics beginning to cease identifying themselves as Catholics by the age of twenty-five. Supporting these research findings is the spirit of Gen Y Project (Mason et al., 2007), which was a collaborative, industry-sponsored

study examining the different forms of spirituality among Australian young people. The researchers studied the worldviews and values of Generation Y, as well as how they find peace and pleasure, their engagement in conventional religion, and other spiritual practises. They reported specific reasons for non-attendance at Church, including disillusionment by Church attitudes and moral issues, the restricted role of women, and a feeling that the Church was unrealistic. The belief and practice of Gen Y is outlined in Table 1.

Table 1

Belief and practice of Gen Y

	Weekly Church Attendance	Belief in God
Gen Y (N=1600)	11%	51%
Gen Y Catholics	19%	77%

(Mason, Webber, & Singleton, 2007)

Baby Boomers and Generation X currently hold senior leadership positions in Catholic schools, and includes a handful of ex-religious people. Many teachers and middle leaders, on the other hand, come from Generations Y and Z, and they will be the future senior leaders of Catholic education. As a result, it is necessary to investigate their viewpoints on formation for mission. Understanding their viewpoint and requirements shed light on the larger challenges.

2.8.3. Traditional inculcation of faith

Catholic schools were founded with the goal of fulfilling a unique purpose based on values found in the Gospel. However, in a "globalised post-modern world that is characterised by moral relativism, secularism and materialism, they face considerable challenges" (Fincham, 2010, p. 64). These challenges come from the reality that future leaders of Catholic schools are immersed in the post-modern world of which Fincham (2010) spoke, and that this presents challenges for the future of Catholic schools. These research findings are supported by Hughes (2008), who found that many of those who are entering Catholic schools in the

teaching ranks do not personally endorse the Catholic Church's teachings on significant issues. This is critical to the research topic since traditional patterns of formation connected with formal Church engagement can no longer be assumed.

The Catholic population's lapse in practice raises the fundamental question of whether a Catholic school can be a true faith community (Dorman & D'Arbon, 2003). Engebretson (2008) posits that "in Australia, parish affiliation and sacramental participation among youth in Catholic schools are very low" (2008, p. 151). If Catholic religious literacy is declining in those who teach and lead in Catholic schools, what impact will this have on students and ultimately future generations of Catholics? This presents a number of concerns, not the least of which is how 'Catholic' Catholic schools must be and appear to be if they are their pupils' primary point of contact with the Church (Engebretson, 2008).

> It is the teachers who reflect and communicate this faith, for the community of a school is made up of people and the teachers are its leaders and witnesses. Those who teach Catholic children and young people have a responsibility to ensure that they are really teaching what the Church believes and practices and that they live it in their individual ways. (Engebretson, 2008, p. 157)

Religious (clergy) school leaders have passed on their spiritual capital to a first generation of lay leaders who have been influenced by their charisms. This generation will carry on the energising spiritual capital that former religious congregation members once held in the field of education (Grace, 2010, p. 123). This would suggest that the earliest phases of the transmission process, or inculcation, have occurred; but, for the purposes of the study topic, it is vital to analyse what happens to spiritual and religious capital in following transmission processes for later generations. How is the religious spiritual capital that was passed down to the first generation of lay leaders being transmitted down to the next?

A greater level of theological literacy is required of teachers, administrators, and leaders of Catholic schools, which is described as the ability to explain knowledgeably how the Church's faith connects to contemporary everyday realities (Weeks & Grace, 2007). To be

effective and to carry out the Church's educational tradition, "laypersons who teach in Catholic schools need a religious formation that is equal to their professional formation" (Miller, 2007, p. 5). This raises the question of whether today's Catholic laypeople are receiving the same extensive and in-depth religious formation for mission as those before them. Is the formation they are receiving of relevance to them and how do they experience the demands of the new policy initiatives for formation and accreditation of teaching and leadership? These questions are at the very core of and instrumental to the purpose of this study.

As mentioned above, traditional patterns of participation and practise, which have been fundamental aspects of lay Catholics' formation for mission, have been fractured and, in some cases, severed. Nonetheless, despite these differences from conventional ecclesial participation and practise structures, important elements of a particular Catholic culture seem to have not only endured but even thrived. This research aims to interrogate the challenge of how to harness these "threads" and to deliver them in new formation for mission pathways.

2.8.4. Professional responsibilities

There is a well-established commitment to ongoing professional development among Catholic school teachers, generously supported by diocesan education offices and congregations. (Benjamin, 2010, p. 151)

The Declaration of Christian Education (Pope Paul VI, 1965) demonstrates soundly the importance of school teachers working to ensure they have the means to effectively educate young people both in faith and in life. The vision statement *New Horizons Inspiring Spirits and Minds* (Sydney Catholic Schools, 2017) espouses the same sentiment. The vision statement pushes schools to review the curriculum they provide students and how it relates to their needs, as well as their methods for teaching and learning, measuring student progress, and reporting. By offering an interesting and demanding curriculum that combines religion

and culture, promoting schools as centres of excellence, embracing the challenge and privilege of working in Catholic schools, and creating an active cooperation between the school, home, community, and parish, and creatively utilising the resources that are already available, *New horizons* promotes high-quality teaching and learning (Sydney Catholic Schools, 2017).

The demands of middle leaders must be addressed in school reform program. Behrstock and Clifford (2009) believe that enhancing teachers' capacities and skills is a crucial technique for engaging Generation Y educators. Local school leaders can have a significant impact on teacher learning, which will increase teacher effectiveness since they have direct responsibility for deciding and evaluating the sorts of professional learning that teachers receive.

As outlined in 2.6.5, how educational leaders affect different student outcomes continues to be a topic of significant interest, with Bryant (2019) pointing specifically to the significance of middle leaders and the direct impact they have on school improvement. Given the consensus that school leadership, in its many forms, is one of the most important influences on student learning (Bassett, 2016; Leithwood, 2004) the type of leadership undertaken is worthy of consideration. Robinson et al. (2008) contend that schools with more distributed leadership will have more personnel who are aware about, and responsible for, educational outcomes improvement. The spread of knowledge, responsibilities, and formal and informal instructional leadership positions safeguards school development efforts from the effects of important employee departures.

Overall, professional learning and formation for mission in Catholic schools are just as much about the community as they are about the individual. Schachter (2005) reaffirms that the production of identity is a mutual construction of the person and contextual social cultural influences, rather than a solitary endeavour. Individuals are formed in light of the Gospel through Catholic education (physical, social, academic, ethical, moral and spiritual). "Catholic

schools clearly distinguish between teaching as a job and teaching as a vocation … the school is a community with a common goal, the promotion of values" (Gellel & Buchanan, 2011, p. 323). Traditionally, most "professional learning is directed to the 'what' teachers do, the 'how' teachers teach and occasionally the 'why' of what teachers do, formation for mission attends to the who question – who is the self that teaches?" (Palmer, 1998, p. 4). Teaching is both a calling and a vocation, according to formation for mission. Formation for mission in Catholic schools is both a "personal and a communal exploration of the inner landscape of teachers' lives by going back to the deep well of the teachers' calling" (Jackson & Jackson, 2002, p. 288).

In addition to all necessary professional learning, persons active in Catholic education ministry must be formed in the distinctiveness of Catholic education's vocation, which necessitates religious formation on par with their general, cultural and, most importantly, professional formation. Miller (2007) supports this notion, stating that "to be effective bearers of the Church's educational tradition, layperson who teach in Catholic schools need a religious formation that is equal to their professional formation" (p. 5). This calls into question whether modern-day Catholic lay people, especially middle leaders in Catholic schools, receive the same extensive and in-depth religious formation for mission as their predecessors.

2.9. Literature review summary

Given the transition from religious to lay, systematic processes have been developed to ensure the Catholicity of schools. This follows other systems approaches to the governing of schools that highlight the importance of formation for mission. One such example of these systemic processes and policies is the "Policy on Accreditation to Work, Teach and Lead" (Sydney Catholic Schools, 2016). Due to this change, the role of a Catholic school educator within schools brings together the internal, private, and personal worlds of Catholic education.

Capper (2005) affirms that our epistemologies are inextricably woven into our spiritualties. This reinforces the high importance of formation for lay Catholics in middle leadership within Catholic schools. In an effort to be more mission-driven in Catholic schools, the role of staff, both in the classroom and at the leadership level, is garnering more emphasis. If the people who are linked with Catholic schools are the primary source of their identity, as Rymarz (2010) asserts, and Catholic identity relies on the concrete witness to the beliefs of the organisation, the faith life of the middle leaders in Catholic schools and their formation for mission is at the core of this research and thus requires exploration.

The analysis of the review demonstrates that middle leadership is a challenging and increasingly important school leadership position and that middle leaders play a crucial role in school improvement. According to the review, school middle leadership is diverse, centred on context, and essential to improving teaching and learning in the classroom. While additional studies on middle leadership are required generally to fill in the gaps in the empirical research, there is even less research on the nuanced role of middle leadership in Catholic schools, where middle leaders are expected to perform ecclesial leadership responsibilities in addition to leadership responsibilities in secular schools. This review aimed to establish an operational definition of middle leadership as well as an understanding of how middle leaders function as change and influence brokers at the school's interface between teachers and senior leaders.

Faith life is an important theme in this study because it is worth emphasising at this point the reality of a staff in Catholic schools where evidence indicates a growing distance from the ecclesial Church. The faith life of teachers and their devotion to the Catholic way of life has received much attention. A question worthy of further exploration is: how aware are young Catholics of their role as bricoleurs, and to what extent are they consciously constructing an identity, or are they just rejecting the elements of Catholicism that no longer appeal? As the number of consecrated individuals serving as school leaders and teachers has declined, these

religious (clergy) school leaders have passed on their spiritual capital to a first generation of lay leaders and teachers who have been influenced by their charisms. "This first generation are the inheritors of the animating spiritual capital in education formerly possessed by members of the religious congregations" (Grace, 2010, p. 123). This would suggest that the first stages of the transmission process or inculcation appear to have taken place; however, what happens to spiritual and religious capital during successive transmission processes? This is a crucial topic for the research question. How is the religious spiritual capital that was passed down to the first generation of lay leaders being transmitted down to the second generation of lay middle leaders?

Laity who teach in Catholic schools require a religious formation similar to their professional formation in order to properly carry on the Church's educational legacy (Grace, 2010). This begs the question of whether modern Catholic middle leaders are receiving the same comprehensive religious formation for mission as their predecessors. Is the formation they are receiving of relevance to them? How do middle leaders experience formation for mission? These questions are at the very core of and instrumental to this study.

Pope Paul VI (1965) asserted that teachers must realise that whether or not the Catholic school achieves its goal is mostly dependent on them. At the core of the research problem are the repercussions of teachers' profound impact on people they educate and their involvement in faith transmission. Given the role of middle leaders (who by definition hold teaching responsibilities) in a Catholic school, as both a profession and vocation, the need for formation for mission for those charged with the responsibility of Catholic education becomes clearer.

This literature review has offered a strong knowledge and evidence base on which to base the current investigation. This analysis has demonstrated, in particular, that there is a growing interest in the role of faith leadership and mission formation in contemporary Catholic schools. Insights gained from the literature relating to the research question - *What is the nature and aspects of religious formation that is provided to middle leaders in Catholic*

schools? And how do these middle leaders view their formation experience for leadership in a Catholic school? have led to the following concomitant sub-questions:

RSQ1 What are the ecclesial expectations of school leaders in general and middle leadership in particular?

RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?

RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

Chapter 3: Research Design and Methodology

3.1. Introduction

This study explores how middle leaders in Catholic secondary schools perceive their role as faith leaders and how formation for mission might better prepare them to fulfill their ecclesial responsibilities. Within an interpretivist research paradigm and symbolic interactionist theoretical perspective, this study uses a case study within a mixed-methods design methodology (O'Donoghue, 2007) to address the research question: *What is the nature and aspects of religious formation that is provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school?* Four sub-questions were identified:

RSQ1 What are the ecclesial expectations of school leaders in general and middle leadership in particular?

RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?

RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

This chapter justifies the research design by examining the research question in terms of research paradigm, theoretical perspective and methodology. It then presents the specifics of the research design, including the research participants, data generating and analysis methodologies, and research stages. Table 2 gives an overview of the research design and methodology.

Table 2

Overview of the research design and methodology

Epistemology	Constructionism	Through interaction, individual meaning is formed in one's own time and location
Theoretical Perspective	Interpretivism / Symbolic Interactionism	involves employing the approach that seems to be most appropriate to address the research problem. Adoption of mixed-methods research
Research Methodology	Case study within a mixed-methods design	Concentrates on interpretation and understanding
Methods	Document analysis Online survey Semi-structured interviews	Adoption of both qualitative and quantitative methods
Participants	Purposive self-selection	A planned selection of individuals who self-nominated and would supply the needed information

The theoretical framework that follows is outlined to justify the research methodology used.

3.2. Theoretical framework

Given that the purpose of this research study was to examine how middle leaders in Catholic secondary schools perceive their role as faith leaders and to understand how formation for mission might better prepare them to fulfil their ecclesial responsibilities, the interpretivist research paradigm was employed (Crotty, 1998). A case study within a mixed-methods design was used as the methodology, and the theoretical perspective was symbolic interactionism.

Theoretical frameworks, according to Mikkelsen (2005), are "orientations or ways of looking at the social world" (p. 157). Adopting a suitable theoretical framework aids the researcher in clarifying and articulating the research process. The research is driven by the theoretical framework, which serves as a "lens through which you view the world" (Merriam, 1998, p. 45). There are three framework elements identified and discussed by Creswell (2003) who stated, "Philosophical assumptions about what constitutes knowledge claims; general

procedures of research called strategies of inquiry; and detailed procedures of data collection, analysis, and writing called methods" (p. 346). This builds upon Crotty's (1998) assertion any researcher must be able to defend their research methodology selection.

A theoretical framework was described by Mertens (2005) as a "paradigm". The paradigm chosen both informs and reflects the research methodology. This research was carried out in a methodical manner, with data being collected, analysed and interpreted. This methodical approach resulted in a clearer grasp and explanation of the research problem. Given that the purpose of this study was to examine how middle leaders in Catholic secondary schools perceive their role as faith leaders, and to understand how formation might better prepare them to fulfil their ecclesial responsibilities, the interpretivism research paradigm was used (Crotty, 1998).

A theoretical framework gives the research the structure it needs to choose the right epistemology, theoretical perspective, methodology, and data gathering methods (Crotty, 1998). The study's mixed-methods design used quantitative and qualitative methods. This study benefited from mixed-methods research since it used several strategies to investigate the research problem.

3.2.1. Epistemology – constructionism

Epistemology is concerned with the nature of knowledge by examining "how knowledge is generated and accepted as valid" (O'Donoghue, 2007, p. 9). It is a way of explaining and understanding "how we know what we know" (Crotty, 1998, p. 19). Constructionism is an epistemology that coincides with the study's research purpose. The individual interpretative nature of human meaning-making; awareness of historical, cultural and societal perspectives on that process; and the research method's essentially interactive nature are all core assumptions of constructionism (Crotty, 1998). Instead of offering a prescriptive formula for

what should be examined, constructionism suggests paths through which emergent notions and theories can be researched to characterise and explain occurrences (Crotty, 1998).

An epistemology known as constructionism holds that people construct meaning in their own time and space by interacting with their surroundings (Schwandt, 1994). This means that the middle leaders in this research can "perceive and so construe the world in ways that are often similar but not necessarily the same" (Bassey, 1999, p. 43). The aim of this study seeks to better understand the ways in which middle leaders in Catholic secondary schools experience leadership formation and the resulting complex web of meaning-making that accompanies it. Because of these factors, constructionism is the greatest fit for this study.

The life experiences, attitudes, beliefs and views of educational opportunities of the middle leaders in this study all influence their thinking. In this context, the interaction between the participants in this study will help construct the knowledge and meaning of faith leadership and will help draw conclusions regarding the participants' involvement in religious formation experiences. Participants can interact in their social surroundings as they see it with this method. A person's existence is "made meaningful through their interpretation of the lived reality" (Welsh, 2001, p. 61). Interpretivism can help us understand how middle leaders interpret the world they construct as a result of their formation experiences. The interpretivist researcher cannot accept the idea "that there is a reality out there that exists independently of people" (Bassey, 1999, p. 43) and seeks to make meaning from personal experiences and stories, and from the way people interact.

3.2.2. Theoretical perspective – interpretivism

The research design must enable the researcher in determining how secondary Catholic school middle leaders make sense of their formation experiences and how this affects their religious formation for leadership. An interpretive approach is what this is (Maxwell, 2005). Interpretivism is concerned with people and "how they interact with one another, as well as

what they believe, how they acquire ideas about the world and how their worlds are built"
(Thomas, 2009, p. 75).

We can "make sense of the world" by adopting a theoretical viewpoint, according to
O'Donoghue (2007, p. 27). It denotes a more nuanced understanding of how knowledge is
formed and is the philosophical context in which epistemology is contained. The theoretical
perspective verifies the research design's assumptions regarding knowledge and knowing
(Crotty, 1998). "The main point of interpretivism is that we are interested in people and the
way they relate to each other – what they think and how they form ideas about the world; how
their worlds are constructed" (Thomas, 2009, p. 75).

Understanding context in any interpretivist-based investigation enhances
comprehension of participants' contextual setting. In this study, it helps the researcher to
explore the belief and behaviours of middle leaders in their context because "we cannot
understand the behaviour of members of a social group other than in terms of the specific
environment in which they operate" (Bryman, 2004, p. 281). The importance of the social
context for comprehending human behaviour is emphasised by O'Donoghue (2007). Within
an interpretivist paradigm, there are a number of theoretical perspectives.

The interpretivist research paradigm that forms the basis of this study, symbolic
interactionism, is chosen as the primary lens because it is well suited for examining the
understandings that exist in culture as a "matrix of meaning" (Crotty, 1998, p. 71) that
influences how meaning is produced for life in a specific place, time, and situation. Focusing
on "subjective understandings and the perceptions of and about people, symbols, and objects"
(Berg, 2004, p. 8) is what symbolic interactionism does and "it is a perspective that places
great emphasis on the importance of meaning and interpretation as essential human
processes" (Patton, 2002, p. 112).

Blumer (1969) articulates three main premises as fundamental to symbolic
interactionism and underpins it as a theoretical perspective. The first principle relates to the

Chapter 3: Research Design and Methodology

centrality of meaning. "People act toward things on the basis of meanings they have for them" (Cohen et al., 2000, p. 24). The symbolic interactionist is interested in the meanings assigned to a situation. The social world in which the existence of symbols, such as language, allows them to give meaning to objects (Cohen et al., 2000). There are shared meanings from which people then construct their own meaning. This is important in a Catholic school where a shared culture could be assumed through tradition, expression of spirituality and education.

The second premise is the ongoing process of giving items meaning through symbols (Cohen et al., 2000). Meaning is always emergent, in flux, and subject to change. "The individual constructs, modifies, assembles, weighs the pros and cons, and negotiates" (Cohen et al., 2000, p. 24). It should be stressed that each person's interpretation of the universe is legitimate and deserves respect as an alternative (Crotty, 1998). Language is central to understanding middle leadership formation because there are different understandings of formation and how faith leadership is understood.

The third principle concerns this process of change and transformation, which occurs in a social context. People match their behaviour to those of others. They construct how others would or might act in certain circumstances and how they themselves might act (Cohen et al., 2000). "They may try to manage the impressions others have of them or enact a performance, or they may try to influence others' definition of the situation" (Cohen et al., 2000, p. 24). The meaning-making that takes place is relational and dynamic – one is not alone in the journey. Individual and group meaning-making is flexible and dynamic. An interpretivist perspective is provided by symbolic interactionism, "whereby we enter into the perceptions, attitudes, and values of a community and become persons in the process" (Crotty, 1998, p. 8).

With regard to this study, the research adopts an interpretive approach to how middle leaders perceive the adequacy of their formation for leadership. Because of the focus on the subjective rather than the objective side of social life, this study's interpretation is most consistent with symbolic interactionism (Neuman, 2007). The study of how respondents built

their personal and professional ideas was informed by symbolic interactionism. This included an analysis of key documents and provided a base line for interpreting the personal responses articulated by participants in the survey and open-ended questions. The interpretive paradigm, constructionist epistemology, case study technique and a mixed-methods design (which combines quantitative and qualitative methods for data collecting and analysis) all align with symbolic interactionism; hence it was chosen for this study.

3.3. Research methodology

3.3.1. Case study within a mixed-methods design

Methodology, as described by Crotty (1998), is the "strategy or plan of action of the study" (p. 8). Theoretical justifications for research methodologies and data collection strategies are provided by methodology. In the search for depth rather than breadth (Ambert et al., 1995), the primary research question guiding this study was: *What is the nature and aspects of religious formation that is provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school?* The middle leaders' opinions and personal viewpoints were considered through a case study within a mixed-methods approach. Understanding the research questions from an individual standpoint was made easier by employing this technique. Methodology must be congruent with both epistemological and theoretical perspectives. Both the theoretical stance of symbolic interactionism and the epistemology of constructionism were enhanced via a case study approach within a mixed-methods design.

Whilst this study uses a case study within a mixed-methods design methodology to address the research question it is noted that the researcher, whilst borrowing ideas from the literature on grounded theory, did not adopt a grounded theory design. A case study within a mixed-methods design was thought to be the most logical methodological choice given the

study's aim. This was accomplished through the use of an interpretivist design that included constructionism and symbolic interactionism to guide the design of the research, data collecting, and data analysis. The data collected, gathered via semi-structured interviews, online surveys, and document analysis were analysed using inductive principles to classify categories and theories as they emerged.

This study's methodology was considered appropriate given the central importance of school context and that multiple perspectives needed to be recognised (Yin, 2003). The interpretivist paradigm was a suitable methodology for this study since it emphasises the significance of context (Neuman, 2006). Additionally, the "how" and "why" of formation practices employed in schools were explored by the research questions where the researcher's influence over the variables was limited (Yin, 2009). Finally, each school's contextual circumstances were extremely appropriate for the research issues being examined (Yin, 2009). The research questions and the data gathering and analysis were defined by the mixed-methods design. Employing this design was primarily done so that it might help with comprehending the research issue while conducting a thorough evaluation of a bounded system (Creswell, 2008; Miles & Huberman, 1984) that provided a methodical approach to examining occurrences or themes through the gathering of different types of data, analysis of information, and presenting the results for a particular timeframe and set of criteria (Creswell, 2008). Indeed, Hitchcock and Hughes (1995) argue that such an approach is "the most appropriate format and orientation for school-based research" (p. 316).

The utilisation of a variety of data gathering techniques was made possible by the case study within a mixed-methods design which was advantageous for this study (Merriam, 1998). In this study, middle leaders' responses to an online survey and semi-structured individual interviews were gathered. This approach was chosen for this study because of the contextually rich material. The information gathered was used to answer the study question and add to the expanding body of evidence on leadership formation that has been documented

in the literature. Participants in the bounded system contributed to a better knowledge of what middle leaders think about the role and purpose of secondary Catholic education, as well as the sufficiency of leadership formation.

An interdisciplinary, multi-method and multi-site approach was required to capture the full range of experiences of middle leaders, and fully contextualise their educational experiences *in situ*. This provided an in-depth analysis of how middle leaders experience formation for leadership in real-world terms. The research questions and data collection and analysis were defined by the mixed-methods. The primary goal of employing this technique was to aid in the comprehension of the research questions within a bounded system (Creswell, 2008; Miles & Huberman, 1984). The mixed-methods approach does, however, have known limitations.

3.3.2. Design limitations

The nature of this study is complex, as are most studies, because the research aims to comprehend the case in the context of many contributing elements and variables (Guba & Lincoln, 1994). This study sought to validate what was already understood, uncover new meanings and perspectives among middle leaders about faith formation and faith leadership, and better understand how the two interact. This research design was predicted to give dense descriptions of middle leaders' experiences and the faith formation opportunities afforded to them. At the same time, the limitations of a case study within a mixed-methods design must be considered.

A prominent critique of such a study is its generalisability, which Punch (2005) underlines. Given this researcher's intention to conduct such a study, this limitation was considered. The volume of data, the integrity of views, the generalisation of findings and researcher bias are all recognised as limitations in the literature (Flyvbjerg, 2004; Merriam, 1998; Yin, 1994). The research design has been criticised due to the possibility of the

researcher selecting data to support the production of suggestions based on their own preferences (Yin, 2003). Participants in this study were given the option to double-check and validate conclusions to ensure that the data were appropriately interpreted.

3.4. Mixed-methods approach

The use of both quantitative and qualitative methods is complementary and the use of either or both should be based on the research problem at hand (McKinlay, 1995). In this way the study was provided with an opportunity to statistically analyse data while considering participants' perceptions of their ecclesial preparation for leadership in Catholic secondary schools (Creswell, 2003). To increase the data's accuracy and provide a more comprehensive insight, the study used a mixed-methods approach. The study also sought to remove the biases related to single-method approaches, which would compensate as a strength. Using both quantitative and qualitative data, mixed-methods research was primarily used to enhance analysis and build on findings.

A mixed-methods approach to data gathering and analysis was adopted in accordance with an interpretivist paradigm. The mixed-methods data collection strategies that feed into the chosen methodology (Crotty, 1998) as displayed in Table 3 for this study included: a document analysis; an online survey with closed and open-ended items; and individual semi-structured interviews.

Table 3

Mixed-methods collection strategy

Data sources	Data
Document Analysis	*Catholic Schools at a Crossroads* (2007)
	Educating to Fraternal Humanism (2017)
	Sydney Catholic Schools Policy - *Accreditation to Work, Teach and Lead* (2016)
	Sydney Catholic Schools Recruitment Policy (2019)
	New Horizons Inspiring Spirits and Minds: Strategic Improvement Plan (2019)
	Sydney Catholic Schools Religious Education and Faith Formation Professional Development Calendar (2018)
Online Survey	Quantitative data
	Qualitative data
Individual semi-structured interviews	Qualitative data

The research design guides data gathering and analysis strategies, ensuring that they complement the research project's aim and uniqueness. Data can be a useful source for describing and explaining procedures employed, in particular local contexts, like the one on which this research is focused (Miles & Huberman, 1984). Specifically, the data sources used in this research were the document analysis, online survey and semi-structured interviews. A mixed-methods approach, which combines qualitative and quantitative instruments, can produce more insightful results from more comprehensive data (Teddlie & Tashakkori, 2009) and promote complementarity by using one sort of data to understand another (Liamputtong & Ezzy, 2005). Collecting data in this way helped confirm and validate the results of the research as one research method was used to inform the preparation of another method. For instance, the document analysis helped with the survey and semi-structured interviews' preparation. Different forms of data, provided by the triangulation of the procedures aim to increase the trustworthiness of the conclusions.

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The data collection process and methods used to answer the research question, *What is the nature and aspects of religious formation that is provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school?* and sub-questions are presented in Table 4.

Table 4

Data collection sequence, methods and sources

Research questions	Phase of research	Data gathering strategies	Sources
RSQ1 What are the ecclesial expectations of school leaders in general and middle leadership in particular?	1	Document analysis	Key documents
RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?	2	Online survey (N=111) Quantitative data	Middle leaders (faith related, academic, and wellbeing)
RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?	2	Online survey (N=111) Qualitative data	Middle leaders (faith related, academic, and wellbeing)
RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?	3	Individual semi-structured interview (N=8)	Middle leaders (faith related, academic, and wellbeing)

The study's mixed-method design informed three distinct study phases of data collection. In the initial phase, information from the document analysis was gathered and examined. The second phase entailed gathering and analysing survey data, both quantitative and qualitative. The data from semi-structured in-depth interviews with a small sample of middle leaders were collected and analysed in the third and final phase (those who volunteered to be interviewed) to understand their formation experience, as middle leaders, and the adequacy of their formation experience to meet the Church expectations of their middle leadership role.

There were two types of data analysis: quantitative and qualitative. The quantitative analysis of the survey data includes descriptive statistics and inferential statistical tests. The documents, open-ended responses from the online survey, and semi-structured individual interviews were all used in the qualitative analysis.

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3.4.1. Document analysis

Three distinct study phases were informed by the project's mixed-method methodology. The data from the document analysis was collected and analysed in the first phase to assist the researcher with understanding the ecclesial expectations of Catholic school leaders and to determine the purpose, mission, identity and values of Catholic schools. In the first study phase of the research design, a document analysis was carried out to inform and subsequently elaborate on the quantitative findings obtained in the second study phase, namely the survey. The value of using documents in a case study technique was the driving force behind the decision to use document analysis. Document analysis was used in this study as a form of triangulation to provide extra evidence to support the results of the online survey and semi-structured interview. Because it gave the case study context and background, the use of document analysis in this study was justified. Additional questions could be answered, more information could be provided, and results from other data sources could be confirmed.

The document analysis helped the researcher to understand the ecclesial expectations of school leaders in Catholic schools and to determine the purpose, mission, identity and values of secondary Catholic schools. It also provided insight into the Church's understanding of lay staff in Catholic secondary schools in general, regarding formation and educational opportunities. At the same time, the researcher surveyed and interviewed individuals about their understanding of evangelisation and religious formation opportunities and the corresponding school policies and programs. The document analysis data sources are displayed in Table 5.

Table 5

Document analysis data sources

Data	Data Sources
Document Analysis	*Catholic Schools at a Crossroads* (2007)
	Educating to Fraternal Humanism (2017)
	Sydney Catholic Schools Policy - *Accreditation to Work, Teach and Lead* (2016)
	Sydney Catholic Schools Recruitment Policy (2019)
	New Horizons Inspiring Spirits and Minds: Strategic Improvement Plan (2019)
	Sydney Catholic Schools Religious Education and Faith Formation Professional Development Calendar (2018)

Both Church and policy key documents that were analysed provided information about the expectations of the Church, and helped the researcher to understand the expectations of leaders (middle leaders in particular) in Catholic secondary schools. This required the researcher to explore and become familiar with the data, creating initial codes, developing categories. (i.e. a collection of numerous codes that are connected in content or context), finding themes, examining themes, and identifying and categorising themes. This thematic analysis, used as a technique to interrogate the documents, is "a method for identifying and reporting patterns with data" (Bruan & Clarke, 2006, p. 79). The document analysis undertaken in this study took steps to ensure both rigour and clarity. Firstly, the researcher reviewed, read, and reread the documents to become familiar with the data. From this, initial codes were generated, which saw the text divided into segments and broad categories. These segments were labelled with codes, where they were reduced and patterns of overlapping codes combined with potential themes emerged. These themes were then reviewed with a view to confirm validity and ensuring connectivity with the data (internal validity). Then, themes were defined and named. Although this thematic analysis was time consuming, it provided both rich and detailed data in a flexible manner. These themes provided the researcher with insights about Church expectations of the of leaders, and middle leaders in particular, in Catholic schools.

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The analysis of the documents found that there were two notable variances between the two sets of documents. The first distinction between the documents was conceptual and outlined Catholic schools' ecclesial standards, while the other contained operational documents that explained policies and program. These disparities between the two sets of documents aided in the development of three questions to help explain ecclesial expectations and the evangelising function of secondary Catholic school instructors and leaders: what distinguishes Catholic schools from other schools? What role do teachers play in Catholic schools? What role do leaders play in Catholic schools? The second distinction between the documents aimed to expose the precise policies and programs in place to facilitate the Church's ecclesial expectations being met. This contrast between the documents gave the researcher information regarding the Church's expectations of secondary Catholic school leaders in general, and middle leaders in particular.

The advantages of document analysis in the study substantially outweighed the downsides (Bowen, 2009). The documents used were easy to obtain from the Archdiocese and were cost-efficient because the data was contained in the documents and needed only to be analysed. Considering this, there were a number of documents that were available and valuable to the research in this study. These documents provided evidence of the Church's understanding of the role, mission and purpose of Catholic schooling along with how that is translated into the policy documents and programs within the bounded case study. It was hoped that by reviewing and analysing a range of documents, the professional and personal insights of several middle leaders would be better understood, which is at the heart of the research problem.

3.4.2. Online survey

An online survey was employed as a data collection tool in the second phase of the study design, and within the context of interpretative research. The survey was created with the

goals of obtaining acceptable data; ensuring that it could be analysed; reducing bias in the formulation and posing of questions (compared to other studies); and finally, ensuring that the questions were both engaging and varied (Creswell, 2008). Informed by the document analysis, the online survey was structured in five parts. Part A of the survey collected basic demographic data on participant characteristics (age, gender, Catholicity, Church attendance, Catholic school experience, leadership role) and school characteristics (school size, schools gender makeup, experience teaching religious education). A list of appropriate, situation-specific responses was provided to participants. Descriptive analysis was used to examine the demographic data to identify distinctive participant characteristics within the target population. Part B of the survey was designed to elicit information from respondents related to their expression of faith at a personal level. Part C of the survey related to their expression of faith as teachers. Part D of the survey related to their expression of faith as leaders. Part E (Section 1) of the survey was designed to elicit information from respondents related to their engagement in formation opportunities from a personal perspective. Part E (Section 2) of the survey related to their engagement in formation opportunities from a teaching perspective. Finally, Part E (Section 3) of the survey related to their engagement in formation opportunities from a leadership perspective. The results of the survey allowed for cross-checking with data from other sources, boosting the study's credibility. Surveys also give an overview of a wide range of middle leader ideas and attitudes (Patton, 2002). For the purpose of this study, participants in the online survey were asked to consider their answers to a series of questions and to explore their opinions of a variety of attitudes about formation opportunities.

The same survey items were provided to each participant in exactly the same way, resulting in standardised replies that helped make the data comparable and amendable to analysis as well as increasing its dependability. Furthermore, participants were free to respond to the questions at their own pace and in their own time. Of the 142 middle leaders who

agreed to participate, 122 surveys were returned, for a response rate of 85.9 per cent. Of the 122 online surveys returned, 11 did not respond past the initial background questions and were subsequently removed, resulting in 111 valid submissions. The 111 respondents were each identified by an automatically generated Leader Identification Number (LID). This information was acquired statistically for two reasons. First, there was limited research on middle leader formation and religious leadership in Catholic secondary schools; and second, the survey presented an opportunity to gather more diverse data that would give this research statistical perspective.

LimeSurvey was used to develop the online survey (Hall & Ryan, 2011). Simple, direct, and designed to elicit as much information as possible are the best types of questions to use. Prior to getting the survey, all participants were contacted and told of its purpose. Each question was asked in the form of a statement. The questions focused on how middle leaders understand their leadership, how they understand the concept of formation, how they construct their Catholic identity, and how they view the relevance of the formation opportunities available to them. The survey was designed with both closed-ended and open-ended questions to prevent bias, and participants urged to give answers that match a particular opinion. The survey contained scaled responses, check boxes, multiple-choice items and yes/no responses, as well as the option to write free responses. The five-point Likert scale was used for the closed-format items: "strongly agree"; "agree"; "neither agree nor disagree"; "disagree"; "strongly disagree". This straightforward style was designed to allow for efficient completion of the survey and easy analysis of the findings, as well as to test the main research topic.

The survey questions were presented in a specific order in a logical sequence of how faith is expressed at a personal, teaching and leadership level to answer the research question, *What is the nature and aspects of religious formation that is provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for*

leadership in a Catholic school? and sub-questions. Part A of the survey contained demographic questions; Part B explored the respondents expression of faith at a personal level and how personal beliefs about evangelisation as reflected in their individual behaviour and relationships with others; Part C explored the respondents expression of faith as a teacher and how evangelisation is translated in beliefs and practices in pedagogy, curriculum planning and programming; Part D explored the respondents expression of faith as a leader and how evangelisation is translated in beliefs around leadership in a Catholic school; and finally, Part E explored the respondents engagement in formation opportunities and how religious formation is experienced by middle leaders in Catholic secondary schools. The survey questions followed this logical sequence of how faith is expressed at a personal, teaching and leadership level followed by an evaluation of the respondents engagement in formation for mission opportunities.

The survey followed a common framework to maintain a basic level of consistency across all respondents. The survey orientation and constructs are outlined in Table 6.

Table 6

Survey dimensions

Research Sub-Questions	Part	Construct Defined	Constructs	Survey Items	No of items
	A	Demographic questions		A - 1, 2, 3, 4, 5, 6,7,8,9,10.	10
RSQ1 What are the ecclesial expectations of school leaders in general and middle leadership in particular?	B Expression of faith at a personal level	Personal beliefs about the Evangelisation in oneself as reflected in their individual behaviour and their relationships with others	Religious literacy Prayer Centrality of Jesus Faith enactment	B - 1, 2, 3, 4, 5, 6.	6
RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?	C Expression of faith as a teacher	Evangelisation as translated in one's beliefs and practices in pedagogy, curriculum planning and programming	Centrality of Jesus Teaching preparation Pedagogy	C - 1, 2, 3, 4, 5, 6, 7.	7
RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?	D Expression of faith as a leader	Evangelisation as translated in one's beliefs of their role as leader in a Catholic school.	Centrality of Jesus Parish and community connection Prayer enactment	D - 1, 2, 3, 4, 5.	5
RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?	E Engagement in formation	Religious formation as experienced by middle leaders in Catholic secondary schools	Formation of self Formation as teacher Formation as learning Formation as a requirement Formation opportunities Formation as leader	H – 1, 2, 3. I – 1, 2, 3, 4, 5, 6. J – 1, 2, 3, 4, 5, 6.	15

3.4.2.1. Sample selection

This study used purposive selection (Cole, 2006; Merriam, 1998). Purposive selection was

used primarily for two reasons: (a) to focus on individuals who had the particular qualities

that would best inform this study; and (b) to provide a very specific variety of participants

with various points of view. The research sites chosen were considered to be school

contextual and hence appropriate for addressing the research issue (Creswell, 2008) and from

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which one can learn about the research problem. If a participant at a particular school location held a middle leadership portfolio, they were encouraged to participate. The eastern metropolitan Catholic schools chosen for this study had a number of characteristics in common, including leadership structures, middle leadership positions, and teaching staff that were similar in terms of age, gender ratio, and duties. The six largest Catholic secondary schools in the region were chosen. This made it possible to capture different participant perspectives and identify common themes among the school sites. This study sought to understand the perspectives of the diverse participants as well as how they experienced formation for mission experiences and opportunities. It also sought to identify the major themes from the literature.

To be invited for participation for this study, middle leaders in Catholic secondary schools needed to hold a middle leadership portfolio within the leadership structure of the College. The researcher sought approval to conduct research from the learning directorate of Sydney Catholic schools and then sampled the largest schools in the eastern metropolitan region (see appendix C). The researcher opted to limit the study to these schools to ensure the presence of a significant number of middle leaders due to their size. It was outlined that the commitment sought was to encourage the voluntary commitment of middle leaders and in particular, teachers in either a Coordinator 1 or Coordinator 2 positions. These could include Year Coordinator's, Subject Coordinator's, Sports Coordinator, Liturgy Coordinator and any other Coordinator 1 or 2 particular to the school context. For the purpose of this study Religious Education Coordinators were also invited to participate. 142 middle leaders were identified and the researcher sought permission to contact and send online surveys to the identified middle leaders to participate in the research project to investigate formation for leadership in Catholic schools.

Given their credentials, expertise, and leadership skills, secondary Catholic school middle leaders were thought to be the most valuable source of information to aid in

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understanding the research problem and questions. Regarding their perspectives of and experience with taking part in the formation possibilities offered by Sydney Archdiocese, such persons were regarded as specialists. It was considered sufficient to administer a questionnaire at six schools in the eastern region of the metropolitan Catholic school system.

At the conclusion of the questionnaire, respondents were invited to indicate their preparedness to be involved in a semi-structured one-to one interview. The researcher indicated a plan to interview 15 middle school leaders to further explore how middle leaders in Catholic secondary schools experience formation to better prepare them for leadership. Survey respondents were asked to click 'yes' If they wished to participate and then were prompted to give their name, position, school and contact number and were reminded that such details were not stored with their responses to the survey. The researcher contacted all eight survey respondents who indicated a willingness to be interviewed. At the commencement of each semi-structured one-to-one interview the researcher provided each interviewee with a personal introduction, an overview of the purpose and background to the research which included an explanation of confidentiality, anonymity and voluntary nature of interview. Each participant's permission was sought to audio record followed by an invitation for the interviewee to provide contextual information to the researcher about themselves, the type and size of the school in which they worked, their position, teaching area and classes taught.

At the time the data was collected, the researcher did not hold a significant leadership role which minimised any ethical considerations or likelihood of responses being influenced by the researcher.

3.4.2.2. Research participants

The Sydney Archdiocese served as the study's location, which was formerly made up of three regions (eastern, southern and inner western), and involved the six largest secondary schools

in the eastern metropolitan region. Each region, although autonomous in some respects, is governed by the overarching formation policies within the Archdiocese. For this reason, the chosen schools were selected so that they were representative of Catholic secondary schools across the diocese. In response to the Bishops' pastoral letter "Catholic Schools at a Crossroads" (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007), it was decided that there was a duty to create suitable, encouraging, yet challenging avenues for teacher preparation and continued professional development, notably in religious education, as well as for the professional and spiritual growth of those who will oversee these schools in the future. This research involves exploring the perceptions and understandings of a range of middle leaders within the chosen metropolitan region of the Archdiocese of Sydney. This study's major research question is to explore how middle leaders believe their faith formation and ecclesial preparation are appropriate.

In this study, purposive selection was used (Cole, 2006; Merriam, 1998; Patton, 1990). Purposive selection was used for two main reasons: to focus on participants with specific qualities who were best suited to the study, and to limit the study to the largest schools to ensure a rich pool of middle leaders. The research sites chosen were thought to be relevant to the school setting and thus were appropriate venues for the research question (Creswell, 2008).

Those who held middle leadership positions and had taken advantage of professional learning opportunities at the school or system level were chosen as participants at the various school sites. Catholic secondary schools were required to be part of the Metropolitan Catholic school system in order to be considered for this study. Six secondary schools that satisfied these requirements were chosen to provide consistent, context-bound comparison sites.

3.4.2.3. Middle leader participants

Middle leader participants were selected in a relatively large and diverse metropolitan context. Time and accessibility were other important considerations in their selection. Within each school, purposive selection (Cole, 2006; Merriam, 1998; Patton, 1990) was chosen because it is founded on the concept that the researcher purposefully picks individuals to discover, comprehend and acquire insight into the central phenomenon. Participants with "information-rich" knowledge and opinions can be accessed through purposeful selection (Patton, 2002, p. 46); in this case, middle leaders.

Subgroups that coexist in the school and contribute to the curriculum are referred to as middle leaders by Wise (2001). Middle leaders, as stated by Wise (2001), are "those responsible for an aspect of the academic curriculum, including departments and faculty heads, curriculum team leaders, and cross-curriculum coordinators who are expected to have responsibility for one or more teachers" (p. 334). In addition to academic focus, those with subject department or pastoral responsibilities are referred to as middle leaders (Gunter & Ribbins, 2002). The participants from each school were comprised of individuals in middle leadership positions of responsibility. Post data collection, middle leader participants were grouped in the following way:

- Religious education roles (including faith related roles such as Liturgy coordinators and youth ministry coordinators)

- Academic roles (including subject coordinators and other academic roles)

- Wellbeing roles (including year coordinators and other welfare roles)

All potential middle leader participants received invitations to participate in this study, together with precise information on the project's goal, eligibility requirements, research methodology and data collection techniques as outlined in Appendix D. By accepting the invitation to participate, the participants were thus self-selecting. The study's expectations,

how the results would be communicated, and the details of the ethical clearance were explained to middle leader participants to allay any fears or reservations they might have about their participation or the confidentiality of their identities. The anonymity of participants was ensured not only for theoretical considerations of the case study approach, but also because in some cases their descriptions of events and opportunities would expose them to sensitivities about their schools, regional authorities and possibly their colleagues. To maintain anonymity, each participant received an auto generated unique number with each invitation, so it was not possible for the researcher to identify them and no mention to their or their school's identities was disclosed. An overview of the research participants is displayed in Table 7.

Table 7

Research participants

Participants	Specific roles	Online survey	Semi-Structured Interviews
RE leaders (faith related)	Academic leader - RE Liturgy Coordinator Social Justice Coordinator	12	2
KLA (academic)	Academic Leader (KLA other than RE) Special Education Coordinator E-Learning Coordinator	45	3
Wellbeing (welfare)	Year Coordinator Administration Coordinator	54	3
Total		111	8

3.4.2.4. Survey participation

One hundred and forty-two middle school leaders consented to engage in the survey from the six Catholic secondary schools from the eastern region in the Archdiocese of Sydney invited to participate. One hundred and twenty-two of the 142 questionnaires were returned, reflecting an 85.9 per cent response rate. A series of reminders were sent to complete the questionnaire. Of the 122 online questionnaires returned, 11 did not progress beyond the

initial background questions and were subsequently removed, for the purpose of data analysis resulting in 111 valid submissions. 48 percent of responders were female, and 52 percent were male.

The vast majority of survey respondents (89 per cent) came from academic and pastoral backgrounds, and described themselves as subject leaders (coordinators) and year leaders (coordinators). It should be noted that such roles may have different labels in different contexts. The specific leadership roles of the survey respondents are also shown in Table 7.

3.4.2.5. Preliminary data analysis

Before any data analysis could begin, it was necessary to determine whether the question items from each component genuinely offered information that may have helped with the analysis. As a result, scale reliability checks were required to provide the researcher with confidence that the scales used in subsequent analyses were internally consistent, meaning that the items were in the same grouping. Response data were collected for each item statement, then processed and analysed using the SPSS program. Codes 1, 2, 3, 4 and 5 were allocated to the replies Strongly Agree, Agree, Neither Agree nor Disagree, Disagree, and Strongly Disagree.

In line with the procedures recommended by Tabachnick and Fidell (2013), a series of preliminary analyses were undertaken to gain an understanding of the sample and of the data. Pallant (2007) reminds researchers that, prior to commencing any analysis of the data, it is essential to check the data set for any errors that may have been entered when placing data into the SPSS datasheet. Therefore, the entire data set was checked for scores that were out of range. Firstly, minimum and maximum values were checked and their appropriateness was ensured. Secondly, the number of valid cases and missing cases were checked. As no such errors were found, it was decided to proceed with the process of preliminary data analyses before performing specific statistical analyses to answer the research questions.

The survey's determination of internal scale consistency and reliability was crucial. For each of the survey scale names, the Cronbach's alpha coefficient was determined, and a value of 0.70 or higher was considered reliable (Santas, 1999). Table 8 displays the survey scale statistics.

Table 8

Survey scale statistics

Scale Name	N items in Scale	Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	Scale Mean	Scale SD
Expression of faith at a personal level	6	0.844	0.844	27.48	4.504
Expression of faith as a teacher	7	0.878	0.872	28.65	4.227
Expression of faith as a leader	5	0.831	0.828	21.17	2.904
Engagement in formation	15	0.903	0.924	30.21	7.463

Note: N=111

Table 8 shows the internal consistency in responses within the scale. As an index of internal consistency reliability, the Cronbach's coefficient alpha ranged from 0.831 for "Expression of faith as a leader" to 0.903 for "Engagement in formation". Internal consistencies of all the scale names were acceptable (quite high); therefore, the four scale names for the survey instrument fell within the normal range and made a reliable contribution to internal consistency. The high coefficients increase the credibility of the data collection process. It is also important in this research that the survey be subjected to validity testing. The next section describes the techniques used to test the validity of the online survey.

3.4.2.6. Validity testing of the online survey

Construct validity, as flagged by Black (1999), is probably the most appropriate means of validity testing for a researcher-developed instrument. Black (1999) further suggests that to ensure an instrument measures what it is meant to measure, this could be achieved in one of three ways: logical or rational strategy, factor-analytic strategy or empirical strategy. For the

purpose of this study, both logical analysis and factor-analytic strategy was used for testing the construct validity of the survey.

Using logical analysis to establish the construct validity of the formation for leadership survey, literature on formation for leadership in Catholic secondary schools, specifically those undertaken by middle leaders, was reviewed to identify possible items to be included in the survey. The correspondence between the individual items and the concept were assessed through both expert validation and a pilot survey. Expert opinion was sought from five senior school and diocesan leaders. These experts, which included office and school personnel with extensive leadership experience within Catholic education, were not part of the survey population. A small group of ten people were requested to take part in a pilot survey to test it, and offer feedback on the question items and open-ended questions. With certain modification of the survey following both the expert validation and pilot survey, a reasonable degree of confidence was achieved, thus establishing the content validity of the formation for leadership survey.

The purpose of the survey instrument's expert validation was to detect any problems, enhance the style and clarity of the questions, and verify the validity of the survey's content. "A pilot test of a questionnaire or interview survey is a procedure in which a researcher makes changes to an instrument based on feedback from a small number of people who complete and rate the instrument" (Creswell, 2008, p. 402). The individuals who participated in the expert validation would not otherwise participate in the study. Firstly, an expert panel of five leaders (which included senior school and diocesan leaders) were asked to review the survey and comment prior to the survey with a small group of ten participants. This small group, comprised of middle leaders in Catholic secondary schools, were asked to test the survey and provide feedback on the question items and open-ended questions. Both the expert panel and participants in the pilot study were invited to write down any comments or ideas, which were then examined and discussed with the researcher (the draft survey for critical experts is found

in Appendix E). Based on feedback from the expert panel and pilot group, the questionnaire was updated to improve the layout and clarity of the question items. The feedback from both the expert panel and pilot group was useful in confirming the time needed to complete the survey. In the survey design, thirty minutes were allowed for completion, and the feedback indicated this was realistic. There were minor additions and deletions of question items and open-ended questions as a result of the pilot test of the survey instrument. Feedback from pilot respondents ranged from "comprehensive", "vague in some questions" and "the questions make sense and drill down on the perspectives of middle leaders". Suggestions for improvements and additions saw an improvement to the open-ended questions that allowed participants to provide a more comprehensive response. Other changes also included spelling and grammar, stylistic improvements to reduce question ambiguity and vagueness, and to enhance the participant's experience and allow for the survey to flow logically. The survey's piloting determined that the survey items' content validity, clarity, comprehensiveness, and relevance to the main question and sub-questions were all established (McMillan & Schumacher, 2001b). All pilot analysis and input were incorporated into the main survey instrument, and relevant changes were made to the final survey. The administered survey's final form is displayed in Appendix F.

Construct validity was also assessed by factor analysis, which can be done in a variety of ways, to test how well the items for the dimensions of the variables define the construct. Principal Component Analysis (PCA) was used in this study, which offers components rather than factors. Pallant (2007) points out that PCA aims to "provide a smaller number of linear combinations of the original variables in a way that captures most of the variability in the pattern of correlations" (p. 179). The data were interpreted, and the underlying pattern was identified using the pattern and structure matrices generated by PCA. The results of the principal component method used with varimax rotation showed that most of the items

confirmed the scale constructs. Further details of how factor analysis was used to confirm the survey constructs is contained in 3.6.1 Quantitative analysis of data.

It was crucial for the researcher to safeguard issues of consistency and trustworthiness in this investigation. Accuracy in all documentation, code, and data gathering were ensured to achieve this. All contact information, correspondence, emails, scheduled individual interviews, and interview schedules were meticulously kept and reviewed by the researcher.

Interview transcripts, audio files, and other materials were safely stored with the researcher having exclusive access to them. To ensure that there was a backup of all the information that had been gathered and compiled, every written document was scanned and transferred to a cloud storage account. To further bolster trustworthiness, a peer educational researcher and supervisors examined the qualitative data the researcher conducted and recorded. In the pursuit of trustworthiness, Lincoln and Guba (1985) propose 4 constructs employed by a researcher: namely – credibility, transferability, dependability, and confirmability. According to Lincoln and Guba (1985), one of the most crucial elements in building trustworthiness is ensuring credibility. The issue of determining the veracity of the findings as reported by the researcher and the participant can be summed up as the validation process. Creswell (2013) lists eight methods commonly employed by researchers to guarantee validity: These include: "prolonged engagement and persistent observation; triangulation; peer review or debriefing; clarifying researcher bias; member checking; rich, thick descriptions; external audits; and negative case analysis" (p. 250-251).

Many of the techniques mentioned above - such as, triangulation (using multiple sources to corroborate data), peer review and debriefing (using critical experts and thesis supervisors), member checking (returning the data to the participants so they could verify the accuracy and reliability of the conclusions), clarifying researcher bias (through the acknowledgement of prior experiences that probably influenced both the approach and

interpretation of the study), and prolonged engagement - are all used to ensure the accuracy and reliability of research findings.

3.4.2.7. Survey limitations

Surveys have well documented shortcomings (Burns, 2000; Creswell, 2003). The researcher's inability to control the conditions under which participants complete the survey, the risk of poor response rates, and the fact that the researcher is not present to address any questions that respondents may have while completing the survey are all examples of these constraints (Neuman, 2000). This was addressed in this study with careful preparation, which included piloting of the survey to ensure the question items had clarity, content validity and relevance to the research question and sub-questions so that adequate and valuable data may be acquired even without the researcher being present. One of the risks of not being present (Sarantakos, 1998) is not being able to clarify or answer questions that arise. The researcher was unable to persuade participants to finish the survey, collect extra data while conducting it, or determine the circumstances under which it was completed. Given the survey response rate of 85.9 per cent, and notwithstanding these potential shortcomings, the researcher chose to complement the online survey data with individual, semi-structured interviews to follow up on trends and emergent themes.

In addition, as was outlined in Section 3.4.2, the survey questions were presented in a specific order to answer the research question, *What is the nature and aspects of religious formation that is provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school?* and sub-questions. The survey questions followed a logical sequence at three levels of how faith is expressed at a personal, teaching and leadership level followed by an evaluation of the respondents engagement in formation for mission opportunities. A possible limitation to the survey, given the specific order of the questions, could be the perception that the respondents

answered the questions to achieve social desirability. Whilst this potential limitation is noted by the researcher, it was not considered to be a substantial shortcoming of the survey instrument given strategies employed such as a pilot survey that sought expert feedback. The purpose of the survey instrument's pilot test was to detect any problems, enhance the style and clarity of the questions, and verify the validity of the survey's content. The researcher also accepts that the presentation of the three levels of how faith is expressed at a personal, teaching, and leadership level may not have been universally accepted by the respondents.

Finally, it is noted that the researcher makes no assertions that regular church attendance is in any way a measure or proxy of religious devoutness. Church attendance information was sought and used to profile respondents as middle leaders in Catholic secondary schools on what was once viewed as traditional form of formation and source of religious knowledge. The scope of this study did not provide for an extension into additional literature on measures of religious maturity, motivation and orientation.

3.4.2.8. Online survey quantitative and qualitative data

Through the use of closed and open questions in the survey, this study collected data using both quantitative and qualitative methodologies. In research, questionnaires are frequently used to capture participants' attitudes, views, and opinions (McMillan & Schumacher, 1993) and have been used extensively in educational research. Because it is expected that respondents can read and have the necessary knowledge to answer the questions, surveys are not without flaws. Wolf (1997) makes the assumption that respondents will answer the questions honestly. The goal of the survey was to gather information from a relatively large representative group of middle leaders about their leadership formation experience in a Catholic secondary school. Participants were asked if they were appropriately prepared for their ecclesiastical responsibilities, and if so, how.

In order to minimise bias, the survey was created with both closed and open questions. The use of open-ended questions was designed to further the research question, allow participants to voice their opinions, account for individual differences, and allow respondents to comment on their understanding of essential principles as a Catholic secondary school middle leader. Open-ended questions aided in the comprehension of participants' perspectives and served to supplement, personalise and contextualise Likert scale responses (McMillan & Schumacher, 2001). There was a 100 per cent response rate to the open-ended questions in the survey; that is, responses were received from all participants to all open-ended questions in Parts B, C and D of the survey (111 responses to each open-ended question).

The open-ended questions allowed respondents to comment on their understanding of essential principles as a Catholic secondary school middle leader. Middle leaders were given the option to reply to these open-ended questions, which allowed them to communicate their understanding while also providing more in-depth data. The qualitative survey data analysis employed a thematic analysis which is "a method for identifying, analysing and reporting patterns within data" (Braun & Clarke, 2006, p. 79). It not only gave the study more flexibility, but it also expanded the scope of the study beyond individual perceptions and supplied a data-supported interpretation of the key information. To achieve clarity and rigour, and allow the researcher to take into account the participants' perspectives, the study followed the six common processes used in thematic analysis. These were:

- data familiarisation – open-ended survey responses
- initial code generation – text divided into categories
- theme searching – label categories with codes, seek to reduce, overlap and combine themes
- theme review – validity confirmation and connection with data
- theme naming and defining
- compiling a chapter analysis of data findings

Open-ended survey responses were typed into a Word document with four columns. The first column was used to indicate the leader's identification number. The second column was used to record the response. The keywords were recorded in the third column, and the category analysis was done in the fourth. The qualitative data's conceptual analysis was based on the identification of relevant phrases or concepts. From the responses, these were highlighted and moved to the third column. To group the key words into wider groups, a thematic analysis was undertaken. To gauge the frequency and strength of the notion, the categories were converted into a percentage. A table contained the category, the number of responses, and the percentage of all responses. These approaches enabled the researcher to thoroughly study the responses in order to discover essential themes while providing for freedom to label and categorise the ideas. The presentation of the findings of these two open-ended questions is seen in Chapter 4, and the researcher was able to expand on the quantitative data by incorporating the qualitative data.

The coded analysis of the first open-ended question "What do you understand by the term the *new evangelisation*?" provided insight into what the middle leaders understood by the term the *new evangelisation* and led to the development of the following seven themes: orientation towards the spiritual purpose of the school; developing or reinforcing one's own faith; the purpose of the school is to directly evangelise; living the Gospel values; the role of the school towards Catholic mission; differentiation between traditional and new evangelisation; and evangelisation is the role of school staff. See Table 17 (Chapter 4) for themes, categories, example citations and frequencies. Table 9 provides a specific example of the coding results for this study.

Table 9

Sample coding analysis of open-ended Question 1

Concept	Category	Theme
Providing an understanding of Christ for those with limited knowledge.	A positive orientation	Orientation towards spiritual purpose of the school.
Bringing the faith to baptised Catholics in schools who do not practice their faith by attending mass regularly or participating as a member of their local parish	An ambiguous orientation	
The manner in which we spread the values, moral of Jesus Christ so he is known and loved by today's youth.	A negative orientation	
Evangelisation is to spread the "good news" of Jesus. I'm not sure what the "New" part is.	Orientation not given	
The Catholic Church trying to entice young people to the Church.		
Unsure.		

The coded analysis of the second open-ended question "What do you understand by the term *religious formation*?" provided insight into what middle leaders understand by the concept of religious formation and led to the development of seven themes. Five themes related to the personal perspective of religious formation, namely: orientation towards the role of religious formation; religious formation has a focus on student only; religious formation is concerned with deepening knowledge; religious formation is concerned with deepening faith; and religious formation is more than just a theoretical construct. One theme related to the teaching perspective of religious formation, namely: differentiation between religious formation for teacher and for student. The final theme related to the leading perspective of religious formation, namely: religious formation supports leadership. See Tables 25, 27 and 29 (Chapter 4) for themes, categories, example citations and frequencies.

A critical friend was engaged to determine the degree of agreement and reliability of the coded open ended survey questions. There was strong agreement, and this was supported by the design of the survey. This critical friend, who reviewed the themes of the qualitative data, provided validity confirmation and connection with the data.

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3.4.3. Semi-structured interviews

The semi-structured interviews were the final component of this study's mixed-methods approach, which intended to overcome the limitations of any one research methodology. The study's third and final phase involved gathering and analysing data from semi-structured in-depth interviews with a small group of middle leaders (who volunteered to be interviewed) to better understand their formation experience as middle leaders, and whether their formation experience was adequate to meet the Church's expectations for their middle leadership role.

In addition to the second stage of the study design, semi-structured interviews were also conducted to further explore the themes that emerged from the document analysis and online survey. By allowing the semi-structured interviews' qualitative findings to complement the online survey's quantitative outcomes as well as its qualitative findings, these data triangulated the findings from the survey and document analysis.

A written consent form detailing the study's purpose and how the data will be used, and potential consequences for the participant was read to and signed by each participant prior to each semi-structured interview. A list of the questions that would be asked was also supplied. Participants confirmed understanding the information provided about the study and consented to participate by signing the permission form. The form made it abundantly apparent that their participation was optional and that participants could elect to leave the study at any time without suffering any consequences. In order to provide the participants a chance to verify their previously recorded responses and the general meaning of their interview, a transcript of the interview was sent to them after the interviews. The "member checking" procedure is essential for determining the participants' actual statements (Merriam, 1998).

3.4.3.1   One-to-one interview participation

All survey respondents were asked if they would be willing to engage in a semi-structured individual interview. Of the 111 middle leaders who participated in the survey, eight agreed to participate in a one-to-one interview and all were interviewed. All held middle leadership positions in a range of areas, as shown above in Table 7. Appendix F shows the open invitation to survey respondents to participate in follow-up interviews. Each of the six schools were represented by the eight interview participants, and the participants were representative of the three middle leadership groups as outlined in Table 7.

Information about the participants in the semi-structured interviews highlighted the personal and professional characteristics of this sample of middle leaders within the metropolitan eastern region of the Archdiocese of Sydney. Of the eight middle leaders interviewed, 62.5 per cent (N=5) were male and 37.5 per cent (N=3) were female. The vast majority of interview participants (75 per cent) came from academic and pastoral backgrounds, and described themselves as subject leaders (coordinators) and year leaders (coordinators). It should be noted that such roles may have different labels in different contexts. The remainder of participants (25 per cent) identified as being from a religious education leadership portfolio. The specific leadership roles of the survey respondents are also shown in Table 7.

3.4.3.2   One-to-one interview analysis

Semi-structured interview analysis was carried out after the eight interviews were digitally captured and transcribed for study. The researcher used a thematic analysis approach to analyse the data by first organising and compiling the data and then visually conceptualising it, before processing and interpreting the data to uncover themes, patterns and common perceptions. This involved reading and annotating the data, categorising the data, then linking and making connections to arrive at sub-themes and themes. The NVivo 12 software package

was used for data analysis which allowed for efficient coding, searching and manipulation of the data by the researcher.

The use of coding was instrumental in the analysis of semi-structured interview data. Open coding, axial coding and lastly, selective coding were three stages in the "process of segmenting and labelling text to generate descriptions and broad themes in the data" (Creswell, 2002, p. 450). This enabled the researcher to spot repeated patterns, which in turn generated developing themes, which created a framework within which the data could be analysed qualitatively. When duplication and repetition of data appear, this procedure is complete (Merriam, 1998).

Open coding – the first stage of coding – involved breaking down, comparing, evaluating and categorising data (Corbin & Strauss, 1990). Open coding was important in the early phases of data analysis because it aided in the differentiation of ideas and phrases, which was necessary for developing data categories that are related to one another. Simply said, the researcher read through the data numerous times to develop draft descriptions for data that naturally cluster together. This process ensured the validity of the work. Theorems originate from the meaning that emerges solely from the data. The qualities of each code materialise as examples of participants' utterances are captured and categorised inside the codes.

The next stage of the data processing was axial coding: a set of procedures for putting data back together in new ways following open coding, by generating links between categories. The technique of axial coding is essential for deciphering and understanding the data and is an approach in which open codes are painstakingly scrutinised, honed and then explained. Selective coding followed the formation of links and connections. Selective coding is the "process of selecting the core category, systematically relating it to other categories, validating those relationships and filling in categories that need further refinement and development" (Corbin & Strauss, 1990, p. 116). The foundation for developing meaningful central concepts was provided through selective coding.

The researcher organised the transcripts into significant themes using the methods outlined above, following the guidance provided by the literature review. This helped to establish the research topic and interview questions and produced the initial template of coded quotes. While accurate lower-order codes allowed for subtle distinctions both inside and between themes, a wide higher-order code helped convey an overall sense of the interview's direction (Gwet, 2012; King, 2004). The researcher reviewed the interview transcripts, identified quotes, coded them, and refined the coding.

Three major themes were developed as a result of the semi-structured interviews' coded analysis: namely personal expression of faith, expression of faith as a teacher and expression of faith as a leader. Formation for mission, as expressed by the participants, applies from an individual (personal), educational (teacher) and leadership (leader) perspective. Each middle leader articulated the following sub-themes that were identified as personal expressions of faith, based on an analysis of semi-structured interviews: religious literacy, mission and purpose, prayer, personal faith life, and personal involvement in the parish. As an expression of faith as a teacher, the sub-themes of professional learning, pedagogy and classroom practice, and Gospel values emerged. Finally, an analysis of the semi-structured interviews with middle leaders identified the following sub-themes as expressions of faith as leaders: lay leadership, advocacy of Gospel values, prayer and co-leadership with the parish. The value of employing interviews in a case study approach was the study's rationale for using semi-structured interviews. Semi-structured interviews were employed in this study as a method of triangulation to provide further information that verified the survey's findings. It reduced the impact of any potential biases that might have arisen if only one research technique, like the survey in this study, had been used. A list of follow up questions was also provided to acquire further data and confirm the results using different data sources.

The use of a critical friend, as an expert in the field with extensive research experience, was utilised to provide validity confirmation of the semi-structured interviews which were the final component of this study's mixed-methods approach. Semi-structured interviews were conducted to further explore the themes that emerged from the document analysis and online survey and these data triangulated the results from the survey and document analysis by allowing the semi-structured interviews' qualitative findings to support the online survey's quantitative results as well as its qualitative findings. The use of the critical friend provided one hundred percent agreement as to the generation of the major themes of the study.

Because they give the researcher vital insights into the phenomena being studied from the participants' point of view, interviews are a valuable source of data (Merriam, 1998) and, as Yin (2009) states, interviews are a crucial source of information for case studies. Interviews are typically performed in an open-ended or less organised manner in qualitative research to enable participants to share their ideas on the world. There are various interviewing techniques (Gillham, 2005), and the modes a researcher chooses must take the study aim, research setting, resources, and cost into consideration. Semi-structured interviews need to be guided by carefully considered research questions. Prompts are used so that each interview is "unique and personal" (Gillham, 2000, p. 69). An advantage of semi-structured interviews is that they allow for spontaneity, which can provide rich details about the interviewee's perceptions (Patton, 1990). By using informal, open-ended interviews, the researcher is "able to follow up on previous conversations and comments, clarify observations or go with the flow and allow participants to take the conversation into new areas" (Patton, 1990, p. 282). This allows the interviewer to make informed decisions about what information to explore in-depth. Respondents were probed and asked to describe their own personal experiences of faith formation opportunities, and the questions for the interviews were derived from the participant responses from the open-ended survey questions.

The researcher employed a semi-structured interview protocol (Table 10) to guarantee that the interview was used effectively to obtain data (Creswell, 2008) and to ensure consistency of approach across all interviews. A list of open-ended questions was created to provide the researcher with cues for the participant to keep the interview on track (Creswell, 2008; Glaser & Strauss, 1967). Within each of the six open-ended questions, several sub-questions (predetermined) were formulated to assist with clarification and to prompt the interviewee. Depending upon the initial response to the open-ended questions, not all sub-questions were required to be used in all interviews. The protocol was created to give the researcher a standardised approach to interviewing and to act as a foundation for creating clear and consistent field notes (Creswell, 2009). Table 10 displays the semi-structured interview protocol.

Table 10

Semi-structured interview protocol

Question

1 Welcome and introductions

- Personal introduction, purpose and background to the research.
- Explanation of confidentiality, anonymity and voluntary nature of interview.
- Seek participant's permission to audio record.
- Can you tell me a little about yourself? The type and size of the school in which you work, your position, teaching area and classes you currently teach.
- How would you describe your Church attendance?
- What educational institutions have you attended and how do you feel they have shaped you for your role today?
- How has your background (schooling, university, study, Church attendance) influenced you in your leadership role in this Catholic school?

2 Open-ended question: what does the term new evangelisation mean to you?

- What is the importance of prayer for you?
- Do you feel you can confidently express Catholic views in your class, with your peers, with parents, community generally? why / why not
- Can you describe the connection you see between the parish / school / families?
- What do you see as the connection between the parish and the school?

3 Open-ended question: what does evangelisation look like in your classroom? How is Jesus central to all that you do in class?

- Explain your understanding of Church teaching and are you up-to-date?
- Do you present a variety of views?
- How do Gospel values inform your pedagogy?
- How does your faith permeate your classroom?

4 Open-ended question: what does evangelisation look like in your leadership role?

- As a leader in a Catholic school how do you see your role in promoting the parish, the link between parish, school and community?
- How do you add to the Catholicity of the school in your leadership position?
- How do you see yourself as a religious leader?

5 Open-ended question: What do you understand by the term *religious formation*?

- How do you see yourself as having been formed to teach and lead?
- Why do you see formation as important in your role and as a person?
- How does formation help you grow and develop a deeper relationship with God? Is it important in your role as teacher and leader?
- Is formation part of professional learning or is it something deeper?
- Is religious formation critical in your school?
- What formation opportunities have you experienced? What has been good? What has been not so good? (prayer / retreat / sabbatical / immersion etc etc)
- How has formation experience influenced your leadership? Can you give an example?
- What formation opportunities do you feel you need to meet the demands of your role?

6 Open-ended question: tell me what you understand about the Sydney Catholic School's policy on "accreditation to work, teach and lead"?

- What do you understand by the policy requirements to lead in a Catholic school?
- To what extent do you engage in formation as a way to maintain accreditation?

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3.4.3.3   One-to-one interview limitations

The limitations of using semi-structured interviews need to be acknowledged. Patton (2002) refers to a barrier to credible qualitative findings "from the suspicion that the analyst has shaped findings according to predispositions and biases" (p. 553). The researcher's presence can affect a participant's responses, and if the interviewer isn't skilled at asking probing questions or paying attention, the quality of the data gathered may suffer as a result (Creswell, 2008). It is very important to have a variety of data sources to reduce these limitations. When combined with the other data sources of semi-structured interviews and an online survey, document analysis as a data source has a very valuable place in the validation and triangulation process. It should be noted that the constructs of the survey, as listed in Table 6 above, also apply to the formulation of an interview protocol.

Generalisability – specifically, the transferability of the accumulated data across a of schools in the Archdiocese of Sydney. There was only a relatively small number of survey respondents who volunteered to be interviewed. In the present study, only 8 of the 111 survey respondents elected to be interviewed and there is an increased risk of error when it comes to generalisation of results with the small-sizing nature of this study. The study may be limited in its analysis because results from participants will depend on their knowledge of the formation requirements and opportunities available to them.

3.5. Analysis of data

This study uses a case study within a mixed-methods approach to address the research question. The term *validity* relates to whether or not the study produces reliable results. Due to the inclusion of both quantitative and qualitative questions, the data could be triangulated to see if the quantitative responses supported the findings of the qualitative data. Silverman

(2001) points out that knowledge can never be completely objective, even when subjected to all sorts of tests. He argues that one of the ways to improve validity is to compare different types of data to see if they confirm each other. In interpretative research, rigour is a means to establish the study's trustworthiness by examining its credibility, reliability, and confirmability (Gall & Borg, 1999; Guba, 1989; Lincoln & Guba, 1985).

Data analysis is about "consolidating, reducing, and interpreting what people have said and what the researcher has seen and read" (Merriam, 1998, p. 178). To make sense of the data collected—what was seen, heard, and read—data analysis is a complex, iterative process (Glesne, 2006). Regardless of the precise techniques utilised, interpretive research produces a significant amount of information. Given the variety of strategies to be used and because of the problematic nature of the theoretical and epistemological lens used to collect rich, dense data (Bassey, 1999), a clear plan is both required and crucial. Collecting data and analysing it are two processes in the interpretation of data (Patton, 1990). Within the range of tools offered, this study proposes that data analysis brings together techniques from both the case study and grounded theory traditions to best serve the evaluative case study methodology of this study. Whilst this study uses a case study within a mixed-methods design methodology to address the research question it is noted that the researcher, whilst borrowing ideas from the literature on grounded theory, did not adopt a grounded theory design. A case study within a mixed-methods design was used and the data gathered via document analysis, online surveys and semi-structured interviews were analysed using inductive principles to classify categories and theories as they emerged.

For the purpose of this study, constant comparative analysis is the process of reviewing and comparing each data element to other data while simultaneously collecting the data (Creswell, 2008). The technique of choice for inductively analysing the qualitative data is constant comparative analysis (Maykut & Morehouse, 1994).

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Because it simplifies large volumes of data to emergent and repeating themes, the constant comparative technique was chosen (Lincoln & Guba, 1985). By simultaneously coding and assessing the data to develop themes, the constant comparative technique generates and confirms theory (Glaser & Strauss, 1967). This method of data analysis incorporates coding as well as ongoing comparison of concepts and themes that develop during the data collection process. A cycle emerges in which themes are identified and refined, new themes emerge, and others become redundant. Qualitative researchers often learn "by doing" (Dey, 1995, p. 78) data analysis. Data is constantly reviewed, refined, discarded and evaluated as it is collected, resulting in the creation of new meaning. This is consistent with the constructivist paradigm of this study, in which meaning is created by the interaction of the participants, which takes into consideration both their experiences and views. Figure 2 displays the data analysis and interpretation process undertaken in this study.

Figure 2

Data analysis and interpretation
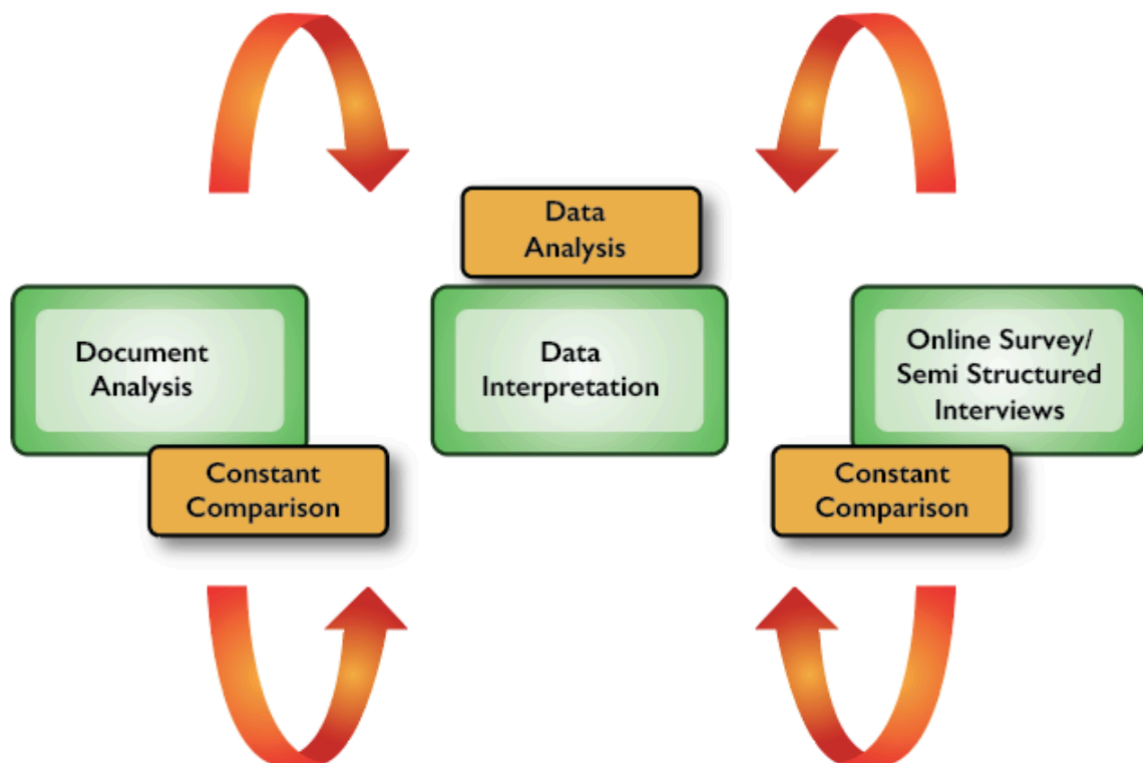
In this study, the researcher had to ensure that consistency and trustworthiness were crucial features. To ensure trustworthiness, a comprehensive audit trail was necessary. This audit process provides assurance that the research conducted is indeed trustworthy (Lincoln & Guba, 1985). This was accomplished through meticulous documenting, coding and data collection. The use of triangulation to ensure the trustworthiness of research data is mentioned by several interpretive researchers (Creswell, 2013; Merriam, 1998). This involves the use of multiple studies, data sources, data collection techniques and validation of the conclusions that emerge. By ensuring that there is sufficient data triangulation, and that the data is rich and dense, colleagues studying the research can believe that it is relevant to their position, and therefore the findings can be transferred and implemented in their own context. Barbour (2005) indicates that the person reviewing the research findings, not the researcher, is responsible for deciding on transferability.

3.5.1. Quantitative analysis of data

The study used the quantitative approach, a scientific methodology based on deductive reasoning and measurement. The results of the survey were statistically analysed. The data analysis process was divided into three stages: data reduction, data representation, and generating and reviewing conclusions (Miles & Huberman, 1984). In the first phase of the process, data were collected, summarised and sorted. For the quantitative data, a series of preliminary analyses were conducted in accordance with the procedures recommended by Tabachnick and Fidell (2007) to gain an understanding of the sample and the data.

The descriptive statistics for each of the survey dimensions were reviewed to acquire a better understanding of the research findings. The research sub-questions were answered using descriptive statistical analysis of the four survey dimensions, which is reported in Chapter 4. The first step was to undertake descriptive statistical analysis. The next phase was factor analysis, which was used to give empirical proof of the survey's construct validity and

to narrow the data down to a smaller number of more broad or inclusive dimensions. Finally, one-way ANOVAs (analysis of variance) were employed to examine statistical significance within each factor among the identified groups. The null hypothesis is that the identified groups (on the factor at issue, such as school size) are not different from each other on the criterion variable when using one-way analysis of variance (which is usually continuous). The discussion on the descriptive statistics and exploratory factor analysis is found in Chapter 5.

Factor analysis was a higher-order statistical approach used to analyse the data. Researchers use factor analysis as a data reduction method to empirically evaluate the relationships between items and to find clusters of items with enough variation to merit their inclusion as a component or construct to be measured by the instrument (Gable & Wolf, 1993). These component analyses were helpful in determining the consistency and coherence of the participants' responses to each of the sub-groupings of questions, as each sub-grouping of items used the same response scale for the middle leader responses. By searching for patterns of correlations between items to produce a measure of the underlying construct, this creates a set of new variables known as factors (McMillan & Schumacher, 1993).

3.5.2. Qualitative analysis of data

Because the quantitative method lacked the potential to properly capture participants' socially constructed opinions in their educational context (Mertens, 2005), this study's design featured a qualitative method. The participants' general perceptions of themselves and their school were the primary focus of this qualitative approach, which is typical in academic research (Weaver & Olson, 2006). In addition, this study's qualitative approach allowed it to understand the participants' opinions as they are "internally experienced, socially created, and understood" (Sarantakos, 1993, p. 36), depending on their unique school experiences. The study acknowledged that each participant's assessment of their role as faith leaders and ecclesial responsibilities was valid and worthy of investigation in order to gain a better

understanding of how meanings were produced by the middle leader participants (Crotty, 1998; Phyte, 1997). As a result, the qualitative technique was chosen since a middle leader's religious formation has been influenced both internally and externally by the participants' personal values and beliefs, as well as their professional values, experiences, and practise, within the setting of the school (Schwandt, 2000). Moreover, it was argued by Cole (2006) that qualitative methods are "more concerned about uncovering knowledge about how people feel and think in the circumstances in which they find themselves, rather than making judgments about whether those thoughts and feelings are valid" (p. 26).

For the open-ended questions in the online survey, document analysis and semi-structured interviews, qualitative analysis was applied. The researcher used a thematic analysis approach to analyse the data, which allowed the participants' perceptions to be categorised into themes. For the qualitative data set, the NVivo 12 software package was used for data analysis. This allowed for efficient coding, searching and manipulation of the data by the researcher (the researcher required training in this complex software and attended an intensive training workshop.) The analysis involved organising and compiling the data and then visually conceptualising it, before processing and interpreting the data to uncover themes, patterns and common perceptions. Because interpretive data analysis is difficult in practise and includes the researcher's subjective viewpoint, it may be useful to combine the above-mentioned analysis and interpretation with Dey's iterative approach (1995). This process involves reading and annotating the data; categorising the data; linking and making connections; corroborating; and finally producing a report.

As detailed in 3.4.2.8 and 3.4.3.2 a critical friend was engaged to determine the degree of agreement and reliability of the coded semi-structured and open ended survey responses. This critical friend, who reviewed the themes of the qualitative data, provided validity confirmation and connection with the data.

3.5.3. Researcher reflexivity

The qualitative researcher has an interest in the subject matter they study for a number of reasons - personal, academic, or professional (Creswell & Noth, 2018). Thus, the qualitative researcher contributes their own knowledge to research initiatives that are based on social constructs (Finlay & Gough, 2008). The researcher must exhibit reflexivity by being aware of and assessing the potential impact of personal interest in the topic (Guillemin & Gillam, 2004) in order to maintain objectivity. The awareness of "what kinds of factors influence the researcher's construction of knowledge and how these influences are revealed in the planning, conduct, and writing up of the research" is what Guillemin and Gillam (2004) refer to as researcher reflexivity (p. 275).

As was explored in 1.2.8, the researcher acknowledged the senior positions held in a number of Diocesan Catholic schools and independent boys' Catholic schools. The researcher also acknowledged a number of positions in Catholic charities working with marginalised youth. It is through these professional and personal experiences that an interest in the mission of the Church and the role of those who lead in Catholic organisations was both fostered and developed.

According to Creswell and Noth (2018), qualitative researchers need to "position themselves" in their study (p. 44). Having noted the researchers position within Catholic schools and the Church more broadly, it was important for the researcher to remain reflexive with both the data collection and analysis.

The researcher was able to maintain objectivity throughout this research by continually editing during the writing process to highlight ways to tell the story of the participants'' perspective being aware that "the researcher's analysis, no matter how oriented to participants' point of view, reflects more than anything the researcher's interests, choices, and concerns" (Chase, 1996, p. 5). The researcher held no preconceptions about how the

participants had engaged or evaluated their previous formation experiences and was very aware of not making any presumptions as to the effectiveness or otherwise of the current formation programs and opportunities on offer within the Archdiocese. In addition, a strict interview protocol was followed in the way interviews were conducted and the researcher avoided an evaluative judgment on the quality of the interviewee's responses. Furthermore, critical friends were engaged initially to review the instruments and the subsequent analyses. Triangulation between the survey and interview phases of the study was motivated by the researcher's desire to neutralise any personal and professional influence over the research findings. It is acknowledged that the researcher engaged in mutual constructions of meanings with the participants in the qualitative data collection and analysis.

3.6. Ethical issues

The Australian Catholic University's Research Ethics Committee (HREC) received a request for ethics approval of research projects involving human participants in 2014. On February 10 2015, the HREC approved this study involving human volunteers (Appendix A). It was presented as a research project with "minimal risk to participants" and received approval. A formal statement of endorsement for the study from the Director of Teaching and Learning for the Archdiocese of Sydney was also included (Appendix B). Information on data collection, security, and disposal, as well as the dissemination of results, was provided in the application to HREC. Ethical considerations include privacy, harm prevention, informed consent, confidentiality, data ownership, and reporting with care (Bassey, 1999; Punch, 2005). Ethical considerations must be considered in two categories: daily interactions with research participants and data gathered from research participants (Glesne, 2006). Because of the nature of this study and the requirement for participants to talk about their personal experiences, strict ethical guidelines were adhered to. Issues of confidentiality and anonymity were significant, and informed consent was gained from the principals of the six Catholic

secondary schools (Appendix C). Informed consent was also sought from each of the middle leader participants (Appendix D).

This study followed a set of protocols governing the design and data collection. These were consistent with those of the Australian Catholic University, Sydney Catholic Institutions, and the six Catholic secondary schools. Moreover, all study data were handled in a way that maintained the participants' confidentiality and anonymity. Each participant was assigned a pseudonym to safeguard their anonymity. Each respondent to the survey was given a Leader Identification Number (LID) and each middle leader who participated in the semi-structured interviews was given an Interview Number (I). This was accomplished by the use of the proper coding, which ensured that the data were kept secure and that access to them was tightly regulated. All participants received information about the study's goals, the types of data that would be gathered, and how the data would be used and reported before they participated in the study. The confidentiality of the middle leader participants, through the steps described, was maintained at all times.

Finally, a critical and fundamental ethical consideration, given the interpretive design of this study, is the role of the researcher and their relationship with the participants. Care was taken to ensure that data collection or analysis was not compromised by these relationships. No researcher begins with an empty mind and no data analysis is neutral (Charmaz, 2006).

3.7. Limitations

Threats to the design's internal and external validity are common in research (McMillan & Schumacher, 2001). The possible weaknesses of the methodology, the reliability of the data and the bias of this research were acknowledged. The use of a variety of data collection techniques, using a mixed-methods approach ensured a wide range of responses. The purposive selection of participants was made to ensure that participants contributed

effectively to the research, and regular peer review and guidance was necessary throughout the data collection stages of the research.

Given a mixed-methods design was employed, the analysis of responses led to triangulated conclusions as opposed to "a single real truth" (Thomas & Brubaker, 2007, p. 109). The researcher collected data through three methods: document analysis, an online survey and individual semi-structured interviews with middle leaders, and data were triangulated in this way to increase credibility, authenticity, and trustworthiness (Creswell, 2002). The specific limitations associated with the survey instrument were highlighted and discussed in Section 3.4.2.7 and the specific limitations associated with the one-to-one semi structured interviews were highlighted and discussed in Section 3.4.3.3.

Finally, because the data were obtained using a mixed-methods approach applied to a specific region of the Sydney Diocese, the findings ought to be seen as illustrative and generalised rather than entirely descriptive of the population of Catholic schools. The ability to transfer findings from one situation to another is referred to as generalisability (Yin, 2003). This is dependent on the study's context as well as the contexts to which the findings can be applied. The goal of this study was to offer a framework for the findings so that they could be transferred and have implications for policy and practice, as well as areas for further research. It is acknowledged that the study was restricted to the Catholic school system in the eastern region of the Archdiocese of Sydney and the findings may not be reflective of other Catholic dioceses.

3.8. Summary

This study examined how middle leaders in Catholic secondary schools perceive their role as faith leaders and to understand how formation might better prepare them to fulfil their ecclesial responsibilities. A case study within a mixed-methods design was thought to be the most logical methodological choice given the study's aim. This was accomplished through the

use of an interpretivist design that included constructionism and symbolic interactionism to guide the design of the research, data collecting, and data analysis. The data collected, gathered via semi-structured interviews, online surveys, and document analysis were analysed using inductive principles to classify categories and theories as they emerged. Using an interpretivist design, this research has an interest in how middle leaders experience formation, and it is hoped that this research will provide direction for policy and practice in the future.

The research design also examined reliability and validity issues, as well as ethical concerns. A document analysis preceded the development of a survey, which was then administered as a pilot survey before being followed by a final survey. Finally, semi-structured interviews with middle leaders explored in greater depth, the themes emerging from the document analysis and the survey providing triangulation of the data collecting strategies.

The generalisability of the findings, though not a major objective of the study, is noted. The relatively small number of survey and interview respondents who volunteered to be interviewed increased risk of error when it comes to generalisation of results with the small-sizing nature of this study. The study may be limited in its analysis because results from participants will depend on their knowledge of the formation requirements and opportunities available to them. Additionally, large sampling can contribute to ensuring a representative population is tested. In the case of the quantitative and qualitative studies undertaken in this thesis, the reality of an insufficient number of middle leaders remains a possibility.

Chapter 4 will present data gathered in response to the major research question developed in Chapter 1 (Section 1.6).

Chapter 4: Presentation of Results

4.1. Introduction

The focus of this study is the nature and aspects of religious formation that is provided to middle leaders, how they view their formation experience for leadership, and the adequacy of the formation experience to teach and lead in Catholic secondary schools. A review of the literature, as explored in Chapter 2, derived the relevant elements on the purpose of Catholic secondary schools and the preparation (formation) of lay leaders of these schools. This chapter will present data gathered in response to the major research question developed in Chapter 1 (Section 1.6): *What is the nature and aspects of religious formation that is provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school?* The four research sub-questions provide a framework for the presentation of understandings from the analysis of the documents, survey and semi-structured interviews. The research sub-questions are:

RSQ1 What are the ecclesial expectations of school leaders in general and middle leadership in particular?

RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?

RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

The study's mixed-method design informed three distinct study phases. Data from the document analysis were collected and analysed in the first phase. These Church documents aided the researcher in understanding the ecclesial expectations of Catholic school leaders,

and to determine the purpose, mission, identity, and values of Catholic schools. The second phase involved the collection and analysis of quantitative and qualitative survey data. Informed by the document analysis, the online survey was structured in five parts. Part A of the survey collected basic demographic data on personal and professional characteristics. Part B of the survey was designed to elicit information from respondents related to their expression of faith at a personal level. Part C related to their expression of faith as teachers and Part D of the survey related to their expression of faith as leaders. Part E (Section 1) of the survey was designed to elicit information from respondents related to their engagement in formation opportunities from a personal perspective. Part E (Section 2) of the survey related to their engagement in formation opportunities from a teaching perspective and Part E (Section 3) of the survey related to their engagement in formation opportunities from a leadership perspective. The third and final phase of the study involved the collection and analysis of data from the semi-structured in-depth interviews of a small sample of middle leaders (who volunteered to be interviewed) to understand their formation experience as middle leaders, and the adequacy of their formation experience to meet the Church expectations of their middle leadership role.

The data analysis fell into two broad categories: quantitative and qualitative. The quantitative analysis included descriptive statistics and inferential statistical tests of the collected survey data. The qualitative analysis included the documents, the open-ended responses from the online survey and semi-structured individual interviews.

Part A of the survey gathered demographic information from the participants, with the findings presented below. For Parts B, C, D and E of the survey, the data analysis and research findings are presented as follows. Firstly, descriptive statistical analysis was conducted. The second step was an exploratory factor analysis designed to provide empirical evidence of the construct validity of the survey and reduce the data to a smaller number of more general or inclusive dimensions. Finally, one-way ANOVAs (analysis of variance) were

used specifically to test statistical significance among the identified groups within each factor. One-way analysis of variance tests the null hypothesis that the identified groups (on the factor in question such as school size) are not different from each other on the criterion variable (which is usually continuous).

The qualitative data analysis used a thematic analysis method, as described in Chapter 3, enabled the researcher to take the participants' perspectives into account. Respondents were given the chance to comment on how well they understood essential concepts as middle leaders in Catholic secondary schools through the open-ended questions. The opportunity for middle leaders to respond to these open-ended questions allowed them to express their understanding of the terms *new evangelisation* and *religious formation*, as well as providing further in-depth data.

The mixed-methods strategy used for this study, as stated in Chapter 3, was completed with the semi-structured interviews in order to overcome the constraints of any one research design. This allowed the researcher the opportunity to probe extensively into the respondents' formation experience, allowing the semi-structured interviews' qualitative findings to enhance understanding of the online survey's quantitative and qualitative findings, further to the qualitative results of the document analysis. The methodology for analysing the data gathered from the semi-structured one-to-one interviews was explained in Chapter 3.

4.1.1. Demographics of the middle leaders participating in the research

The study's participants' personal and professional characteristics as middle leaders in the metropolitan eastern region of the Archdiocese of Sydney were highlighted by information about them. The characteristics of the middle leaders who participated in the survey are reported in 4.1.2, which included demographic information of the participants. The characteristics of the middle leaders who participated in the semi-structured interviews are reported in 4.1.3 and also included demographic information of the participants.

4.1.2. Characteristics of the middle leaders who participated in the survey

The survey participants were middle leaders drawn from within the metropolitan eastern region of the Archdiocese of Sydney. The survey collected basic demographic data on personal and professional characteristics. Descriptive analysis was used to examine the demographic data in order to identify different characteristics of the participants within the target population. The gender breakdown showed that there was an almost even distribution of women and men in the sample. Of the 111 middle leader respondents, 47.7 per cent were women and 52.3 per cent were men. The gender distribution in the sample showed that males outnumbered females by only 4.6 per cent. Table 11 displays a summary of the demographic profile of the sample including religious affiliation, Church attendance and leadership role.

Table 11

Demographic profile of the sample

Characteristic	Category	Frequency
Catholicity	Catholic	91
	Non-Catholic	20
Leadership role	RE	12
	Academic	45
	Wellbeing	54
Church attendance	Regular	34
	Occasionally	47
	Major days	15
	Rarely	13
	Not at all	2

Note. N=111; Catholic=I am Catholic; Non-Catholic=I am not Catholic; RE=faith related leadership roles; Academic=faculty or subject related leadership roles; Wellbeing=welfare or pastoral leadership roles; Regular=I attend Church regularly on Weekends; Occasionally=I attend Church occasionally (more than celebration days only); Major days= I attend Church on major celebration days only; Rarely= I rarely attend Church; Not at all= I do not attend Church at all.

The teaching background of the survey participants revealed that 72 per cent (N=79) hold qualifications to teach religious education, while 28 per cent (N=32) did not. The responses also indicated that 32 per cent (N=35) of the sample currently taught religious education as part of their teaching allocation compared to 58 per cent (N=76) who did not have religious education on their teaching schedule. The teaching experience background of

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the survey participants also revealed that 65 per cent (N=72) of the sample had been teaching between one and five years, 16 per cent (N=18) had been teaching between six and ten years, 13 per cent (N=14) had been teaching between 11 and 15 years, and 6 per cent (N=7) had completed in excess of 16 years of teaching service.

The schooling background of the survey participants revealed that 29.7 per cent (N=33) of the respondents completed all of their education from primary school through to higher education in Catholic institutions, 6.73 per cent (N=7) only attended a Catholic primary school, 14.4 per cent (N=16) only attended a Catholic secondary school (Years 7–12) and 15.3 per cent (N=17) of the respondents received no Catholic schooling whatsoever. Analysis of responses by school size was conducted to determine the response rate by the number of students enrolled in each school. The distribution of responses by number of students showed that 57 responses (51.4 per cent) were from schools with a student population of 700 or more students.

4.1.3. Characteristics of the middle leaders who participated in the semi-structured one-to-one interviews

Information about the participants in the semi-structured interviews highlighted the personal and professional characteristics of this sample of middle leaders within the metropolitan eastern region of the Archdiocese of Sydney. Of the eight middle leaders interviewed, 62.5 per cent (N=5) were male and 37.5 per cent (N=3) were female. Table 12 displays a summary of the demographic profile of the sample, including religious affiliation, Church attendance and leadership role.

Table 12

Demographic profile of the interview respondents

Characteristic	Category	Frequency
Catholicity	Catholic	6
	Non-Catholic	2
Church attendance	Regular	3
	Occasionally	3
	Major days	1
	Rarely	1
Leadership role	RE	2
	KLA	3
	Wellbeing	3

Note. N=8; Catholic=I am Catholic; Non-Catholic=I am not Catholic; RE=faith related leadership roles; Academic=faculty or subject related leadership roles; Wellbeing=welfare or pastoral leadership roles; Regular=I attend Church regularly on weekends; Occasionally=I attend Church occasionally (more than celebration days only); Major days= I attend Church on major celebration days only; Rarely= I rarely attend Church.

The teaching background of the interview participants revealed that 75 per cent (N=6) held qualifications to teach religious education, while 25 per cent (N=2) did not. The profile of the interview respondents also indicated that 50 per cent taught religious education as part of their teaching allocation and that 62.5 per cent (N=5) had been teaching between 11 and 15 years, while 37.5 per cent (N=3) had completed in excess of 16 years of teaching service.

4.2. Research Sub-Question 1

As part of the mixed-methods approach to data collection, key documents were analysed to gain insights relevant to the research. This section presents an analysis of these key documents, and these data allowed the qualitative results from the document analysis to enhance understanding of the quantitative and qualitative results from the survey and the qualitative results from the semi-structured interviews. The purpose of the document analysis was to collect data and answer the following Research Sub-Question:

RSQ1 What are the ecclesial expectations of Catholic school leaders in general and middle leaders in particular?

The ecclesial and Church expectations of middle leaders in Catholic secondary schools are articulated in official magisterial documents that emphasise the purpose, mission, identity

and values of the Catholic school as part of the Church. The production of these documents, to highlight the ecclesial expectations of leaders in Catholic secondary schools, was a response to shifts in society. These shifts were inclusive of a decline of non-clerical leadership, shaken confidence in clerical leadership in schools and the Church due to media coverage and child abuse, and the non-practicing tendencies among many self-declared Catholics. Key documents, both Church and policy (Table 5), were analysed, providing information about the expectations of the Church and helping the researcher to understand the expectations of leaders – and middle leaders in particular – in Catholic secondary schools. These official documents related specifically to Catholic schools and assisted the researcher in understanding the ecclesial expectations of school leaders.

The analysis of the documents revealed two distinct differences between the sets of documents. One set of the documents is conceptual and outlines the ecclesial expectations of Catholic schools, while the other set includes operational documents that reveal the policies and programs. This distinction between the documents provided the researcher with insights about the Church's expectations of the leaders generally - and middle leaders in particular - in Catholic secondary schools.

An underlying assumption in *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) is that those who work in Catholic schools will contribute to the school's Catholic identity. The New South Wales and the Australian Capital Territory Bishops ask all educational leaders and staff to join them to support the objectives of the Catholic school by reaffirming their commitment to Catholic education. The Bishops "look especially to those involved in Catholic schools to make the most of what Pope John Paul II called the sense of adventure involved in renewing Catholic education" (2007, p. 3). For the purpose of this study, both *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) and *New Horizons Inspiring Spirits and Minds* (Sydney Catholic Schools, 2017) are instrumental

documents in setting out the ecclesial expectations of leaders in Catholic secondary schools and in outlining the specific policies and programs to realise these expectations.

4.2.1. Ecclesial expectations of leading Catholic schools

To respond to the research sub-question and following the two distinctions between the documents reviewed, three questions were identified with respect to explicating the ecclesial expectations and the evangelising role of teachers and leaders in Catholic secondary schools: what is the purpose of Catholic schools and what makes them distinct from other schools? what role do teachers play in Catholic schools? and what role do leaders play in Catholic schools?

4.2.1.1. Purpose, mission and values of Catholic schooling

In the first distinction between the documents, the purpose, mission and values of Catholic schooling are articulated in both *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) and *Educating to Fraternal Humanism* (Congregation for Catholic Education, 2017). The Church's ecclesial purpose and mission are outlined by the Catholic Bishops of New South Wales and the Australian Capital Territory, who call upon staff and leaders to ensure Catholic schools are truly Catholic in their life and identity and are centres of the new evangelisation, to enable students to achieve high levels of religious literacy and practice, and ensure that Catholic schools are led and staffed by people who will contribute to these goals. In order to achieve these goals, the Bishops highlight a need for a critical mass of Catholic leaders and staff to enliven Catholic schools. This call for Catholic schools to evangelise, form and otherwise educate the next generation is challenged further in *Educating to Fraternal Humanism* (Congregation for Catholic Education, 2017) which urges new perspectives on people, society, and our relationship with nature. It calls for an education to fraternal humanism. Education should be at the service of a

new humanism that results in the realisation of the common good. Both publications advance a modern view of Catholic education, the goal of creating a civilisation of love, and what it is to be a complete human being. Both offer a perspective on faith and discerning the signs of the time.

The documents emphasise the need for Catholic schools to be truly Catholic in identity, and to be led and staffed by people who contribute to realising that mission. If Catholic schools are to operate as centres for the new evangelisation, then school life and activities – and consequently the people who attend them – must develop a close relationship with Jesus Christ and advance Church teaching. Personal encounters with Christ are believed to be the most effective way for people to develop a strong and enduring faith, and Catholic schools offer the perfect setting for these interactions. *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) urges all those involved in Catholic education to dedicate themselves to ensuring the Catholicity of schools, stating that the ecclesial identity of the Catholic school means that the Catholic school operates with certain assumptions that cannot be assumed in secular schools. In addition to forming Christian disciples with the proper worldview, character, and behaviour, Catholic schools work to put the individual at the centre of a web of relationships that forms a living community and develop their students' personal, moral, and social skills with the aim of creating a better world for all involved in Catholic education.

The documents reveal that no longer can the traditional approach to education and evangelisation be taken, and that Catholic schools' obligations and tasks have evolved over time. This demonstrates the necessity of encouraging a new perspective on people, life, and society. Catholic schools should be related to their local parish because they are Eucharistic communities within the parish environment, sites of prayer that foster Catholic imagination, and places of prayer. They are urged to do so by continuing to seek and favour Catholic children. The documents indicate that the Church expects that these assumptions of ecclesial

identity are animated in the individuals who lead and teach in Catholic schools. Each middle leader in this study not only exercises religious, pastoral, social, physical and academic leadership responsibilities, but also holds a responsibility to teach. For that reason, the evangelising role and the ecclesial expectations of these individuals can also be seen through their role as teacher and as leader.

4.2.1.2. The role of the Catholic school teacher

The Bishops are clear on the ecclesial expectations and role that lay teachers should play in relation to faith, life and culture when they shared that Catholic schools should be staffed by those "who will contribute to the new evangelisation and that Catholic teachers should understand and be solidly committed to the Catholic identity of the school" (Sydney Catholic Schools, 2007, p. 10). Teachers are also expected to educate and live in conformity with Church beliefs and to be dedicated to the school's mission. Moreover, the document analysis shows that while the Bishops not only described the important role that the teacher plays in passing on the Catholic faith, life and culture, but also the opportunity teachers have to evangelise in a way that humanises education and responds to the signs of the times and putting the individual at the centre of education. It is the teacher's example, their interaction with others, their action toward the marginalised, as the most potent and successful means of evangelisation which comes through their expression of faith and their active engagement in Church life. It is in this way that the Catholic teacher meets the ecclesial expectations placed upon them and furthers the mission and purpose of the Church.

The documents reveal the ecclesial expectations of teachers in Catholic schools through their role in receiving and sharing the Good News by their words, deeds, and personal example. *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) urges all those involved in Catholic education to dedicate themselves to ensuring the Catholicity of schools. The role of a Catholic school teacher is

affirmed "by [their] example, [their] interactions with others, [their] actions toward the marginalised, [their] articulation of the faith, and [their] active participation in the life of the Church, [they] are the most powerful and effective forms of evangelisation for those entrusted to our care" (Sydney Catholic Schools, 2007, p. 2). The Church offers these recommendations to all those whose daily task it is to passionately reinvigorate the Church's educational mission. Teachers are reminded of the Catholic identity and mission of the school and are expected to be dedicated to that mission while applying for and being appointed to new positions, as well as on other suitable occasions (Sydney Catholic Schools, 2007). It is expected that this commitment to the Catholic school mission will be supported by alignment with their own specific universe of values.

The documents offer a contemporary understanding of the role played by the Catholic school teacher as the Gospel needs to be re-contextualised and re-proclaimed so that it becomes relevant to the reality of today's students. While it is not about proselytising or "forcing beliefs down students' throats" (Sydney Catholic Schools, 2007, p. 12) teachers need to be ready for the general desire to link ethical ideals of peace, justice, and respect that are proclaimed with social and civic choices (Congregation for Catholic Education, 2017). For it is through the lens of Christian values and principles that teachers gain crucial knowledge and skills associated with being able to critically judge the ethical implications for humanity and the environment of current and future social, political, economic and scientific propositions.

An analysis of the documents suggests Catholic schools should be staffed with highly professional and pastoral teachers who will contribute to the new evangelisation. Teachers are called to consider how the Catholic dimension permeates their subject areas, and the Church's expectation that they be dedicated to the Church's mission and live in line with its teachings. Juxtaposed with these ecclesial expectations, they are, at that same time, called to humanise education where they can develop their own attitudes and live and act in accordance with the

reason of fraternal humanism. The tension of these parallel expectations will be discussed in the next chapter.

4.2.1.3. The role of the Catholic school leader

The document analysis findings reveal the ecclesial expectations of the Catholic school leader that are expressed by each leader through their understanding and commitment to the Catholicity of the school. The tangible expression of this understanding and commitment is through both receiving and proclaiming the Good News by word and deed, and through one's own lived experience. The leader's role is pivotal in ensuring that the Catholic school can encourage each community member's personal and spiritual development. Moreover, the documents reveal an understanding of leadership in Catholic secondary schools that underscores the fact that educating, developing, and evangelising our future generation takes more than just the leadership of our schools; it also demands the cooperation of families and parishes so that everyone can enjoy and live life in all its richness.

The document analysis confirms that this fullness of life, as described in the pastoral letter from the Bishops, in our contemporary, changing, secular society calls for leaders who are "capable of striking out on new paths and meeting the needs of the present with concern for all and without prejudice towards coming generations" (Congregation for Catholic Education, 2017). The documents reveal only a general reference as to how to lead to strike out on new paths, and there is no distinction of how middle leaders specifically are to take forward these ecclesial expectations. While the documents outline the ecclesial expectations from both the local (New South Wales) and global Catholic contexts, there appears to be a dissonance between these expectations. This dissonance will be discussed in the following chapter.

The documents reveal that Catholic schools are to be guided by committed Catholics who are prepared to embrace the Catholic Church's mission, are committed to and understand

the goals of Catholic education, are practising, and understand and profess the faith through witness and daily example in their lives. Moreover, Catholic school leaders are to meet these expectations while humanising education and contextualising the personal, moral and social abilities of those they encounter. This presents an enormous challenge for leaders generally and, for the purpose of this study, middle leaders in particular, as the documents do not delineate how these expectations might be carried out or expressed by middle leaders.

4.2.2. Formation policies and programs

The second distinction between the documents identifies the specific formation policies and programs to support the realisation of the ecclesial expectations of the Church presented in 4.2.1. The documents identified that Catholic identity and mission was the first of five strategic priorities identified in the *New Horizons Inspiring Spirits and Minds: Strategic Improvement Plan 2018–2020* (Sydney Catholic Schools, 2017). The plan dedicated Sydney Catholic Schools to a vision of creating genuine Catholic schools centred on Christ's person, motivated by Gospel ideals, and emphasising the relevance of one's own spiritual life and modern culture. This is of particular relevance to this study as the analysis identifies cultural changes and Sydney Catholic Schools' move to outline expectations of every member of staff to play a role in the Church's mission and bring to bear the Church's ecclesial expectations.

An analysis of the documents suggests that when one receives the gift of baptism they carry with them the seeds of faith in their hearts. Personal encounters with Christ are thought to be the most effective way for people to come to a firm and fervent faith, and Catholic schools are regarded as an ideal place for these interactions. As faith communities, schools exist in the hope that all school community members will have "a personal encounter with Jesus and be strengthened in their Christian witness and discipleship" (Sydney Catholic Schools, 2017, p. 8). The Church recognises that genuine faith cannot be imposed: it is freely accepted or rejected. If the educational and catechetical goals are openly stated to any

potential student, teacher, or parent, and all are encouraged to engage with open hearts and thinking minds, then it is justified to engage in witness, service, and actions. This concept of faith in action, through witness, word and deed is emphasised by the Church for all involved in Catholic education which includes the middle leaders who are the focus of this study.

4.2.2.1. Formation policies

New Horizons Inspiring Spirits and Minds: Strategic Improvement Plan 2018–2020 (Sydney Catholic Schools, 2017) supports this concept of faith in action through witness by speaking of a need for an unambiguous clarity of vision and mission and supports Pope Francis' call for Catholic schools to be led and staffed by missionary disciples. This implies that frequent attendance at Sunday Eucharist as well as active participation in the parish's life and activities are requirements for staff members. Additionally, it implies that there is a requirement for staff personnel to exhibit a clear adherence to Catholic moral and religious principles. This obligation underlines the need for everyone to accept evangelisation as a responsibility of the entire school community and calls on all staff members in Catholic schools to participate in the Church's mission to evangelise.

The reviewed documents highlight the significant ecclesial expectations held generally by the leaders of Catholic secondary schools. For this reason, the Bishops of New South Wales and the Australian Capital Territory (2007) wanted to make sure there was a critical mass of Catholic leaders (and personnel) in Catholic schools. To achieve this goal, Sydney Catholic Schools developed a policy of *Accreditation to Work, Teach and Lead* (Sydney Catholic Schools, 2016), which was a key instrument by which the Archdiocese attempts to ensure that such leaders are appointed. Explicitly, the conditions of appointment under the Sydney Catholic Schools recruitment policy are that "all candidates applying for school leadership positions must demonstrate, as an essential criterion, a genuine commitment to and support of their Catholic faith and active involvement in a local parish community" (Sydney

Catholic Schools, 2019, p. 2). It goes on to state the requirement for a clear commitment to the Church's moral and religious teachings, that the level and extent of involvement in a local parish should be current and ongoing, and demonstrate a commitment to the parish for at least six months.

The document analysis revealed that the Sydney Catholic Schools' recruitment policy (2019) in particular, seeks to define the conditions that are seen as essential to ensure the Catholicity of those who hold senior leadership positions, yet, there is no clarity within the policy to define the conditions that are seen as essential to ensure the Catholicity of those who hold middle leadership positions within Catholic schools. This lack of clarity is also demonstrated in *New Horizons Inspiring Spirits and Minds: Strategic Improvement Plan 2018–2020* (Sydney Catholic Schools, 2017) where it stated: "It is the responsibility of all who work, teach and lead in Catholic schools to nurture partnership in faith, hope and love among students, parents, staff and priests and to embrace evangelisation as a responsibility of the whole school community" (2017, p. 3). While setting the expectation for leadership in Catholic schools was a priority highlighted by the Bishops who sought to ensure that every person selected to a leadership position is a faithful Catholic who is prepared to accept the current mission of the Catholic school, no specificity has been provided to support middle leadership in how to bring these expectations to fruition.

The Sydney Catholic Schools Policy *Accreditation to Work, Teach and Lead* (2016) was the only document that specifically named middle leaders as opposed to leaders in general. The accreditation policy aims to support the school's mission to engage all staff in the Catholic life of the school, to promote professional and academic formation, and to ensure the acquisition of academic knowledge and skills in the areas of religious education and Catholic school leadership. Sydney Catholic Schools strives to promote formation for mission, faith development and ongoing professional growth of all staff members, and to recognise that many staff members bring a range of gifts and depth of Catholic faith and

knowledge to their school community that far exceeds the minimum requirements of an

accreditation structure. The policy is divided into five categories, which are listed in Table

13.

Table 13

Accreditation categories

Category	Target	Inclusions	Currency
A	Support Staff	An introduction to what it means to be employed in a Catholic workplace; an exploration of the Archbishop's Charter for Catholic Schools. SCS guidelines/expectations; discussion of the school's Vision and Mission Statement (if a school-based program); discussion of how these documents relate to the individual's work; partnership with families and parishes.	All support staff are expected to attend a minimum of 15 hours of formation over a 5-year period to maintain their continuing accreditation to work in a Catholic school.
B	Newly appointed teachers	Mission of the Catholic Church; The Archbishop's Charter for Catholic Schools; Catholic Life and Culture; Pastoral Care; Scripture, Prayer and Liturgy; Christian Leadership; Catholic Ethical and Social Teaching; Partnership with Families and Parishes.	All teachers are expected to attend a minimum of 30 hours of formation over a five-year period as a means of maintaining their ongoing accreditation.
C	Middle Leaders	Mission of the Catholic Church; The Archbishop's Charter for Catholic Schools; Catholic Life and Culture; Pastoral Care; Scripture, Prayer and Liturgy; Christian Leadership; Faith Formation of Staff; Partnership with Families and Parishes; Catholic Ethical and Social Teaching; Catholic Worldview across the Curriculum.	It is expected that all coordinators and middle managers will complete a minimum of 45 hours of formation over a five-year period as a means of maintaining their ongoing accreditation.
D	Teachers of Religious Education	Undergraduate studies which include a minimum of six approved units; or undergraduate studies which include a minimum of six approved units in Religious Education/Theology; or a minimum of four SCS approved postgraduate units of study in Religious Education/Theology; or the completion of SCS approved qualification in Religious Education/Theology from an endorsed provider.	It is expected that all teachers of Religious Education will complete a minimum of 45 hours of formation over a 5-year period as a means of maintaining their ongoing accreditation.
E	Senior Leadership	Senior leaders in Catholic schools must be qualified Catholic[*] teachers with the necessary background, knowledge and professional commitment to the Vision and Mission of the Catholic school. Principals, Assistant Principals and Religious Education Coordinators are considered senior leaders.	It is expected that all senior leaders will complete a minimum of 75 hours of formation over a 5-year period to maintain their ongoing accreditation.

(Sydney Catholic Schools Policy *Accreditation to Work, Teach and Lead,* 2016)

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Category C is of particular interest to this study and, as can be seen above, addresses formation at the personal, educational and leadership level for middle leaders. For certification at this level, participation in staff faith formation days, professional development, and/or formal higher education courses in the relevant subjects are often necessary. Training and immersion courses that have been authorised by the Sydney Catholic Schools office may fall under this category, as detailed in the *Religious Education and Faith Formation Professional Development Calendar (2018)*. Category C is also of interest as it relates directly to data collected in the online survey and semi-structured individual interviews on faith expression of middle leaders from a personal perspective as well as from a teacher and leader perspective.

4.2.2.2. Formation opportunities

The document analysis shows that the *Religious Education and Faith Formation Calendar* (Sydney Catholic Schools, 2018) indicates training and formation opportunities for Archdiocesan teachers and leaders to achieve the goals of the strategic improvement plan. The document is closely aligned with the *Accreditation to Work, Teach and Lead* Policy (Sydney Catholic Schools, 2016). There are programs tailored to those in their first to tenth year of teaching, those in middle leadership positions, those in higher leadership positions (such as principals and assistant principals), and those seeking higher religious leadership positions. It should be noted that there is only one program (middle leaders retreat) specifically aimed at middle leaders (middle managers as opposed to middle leaders as defined by the Sydney Catholic Schools). It should also be noted that there are training opportunities for those who hold religious leadership positions, such as Religious Education Coordinators and Youth Ministry Coordinators. The Sydney Catholic Schools policy also states that each school will provide a professional learning day for staff each year, which is a specific faith formation or spiritual development opportunity for staff.

The *Religious Education and Faith Formation Calendar* (Sydney Catholic Schools, 2018) also includes a number of pilgrimages and immersion experiences (national and international) that are available for specific staff. In addition to these opportunities, there are a number of professional learning days on mission and identity for staff in religious education leadership positions (Religious Education Coordinator and Youth Ministry Coordinators). The calendar also includes formation opportunities for aspiring and emerging religious leaders. Catholic education is a dynamic environment that demands continual identification and formation of quality future leaders who are able to deal with a variety of challenges (Sydney Catholic Schools, 2018), and it is clearly highlighted that religious leadership is a priority. The efficacy of the ongoing formation opportunities afforded to middle leaders in Catholic secondary schools will be discussed in the following chapter.

The analysis of the documents identifies the following aspects of the formation programs offered: mission of the Catholic Church, Archbishop's Charter for Catholic schools, Catholic life and culture, pastoral care, scripture, prayer and liturgy, Christian leadership, Catholic ethical and social teaching, and partnership with families and parishes. Engagement in such faith formation opportunities is expected by all middle leaders who are required to complete a minimum of 45 hours of formation over a five-year period in order to receive and maintain their accreditation.

4.2.3. Summary

The data obtained from the document analysis was presented to respond to Research Sub-Question 1 "What are the ecclesial expectations of school leaders in general and middle leadership in particular?" Analysis of the documents revealed two distinct differences between the sets of documents. These two distinctions shed light on the ecclesial expectations of Catholic school leaders to determine the purpose, mission and values of Catholic schools and how these expectations are translated in both policies and programs. The document

analysis provided the researcher with insights about the Church expectations of the leaders generally, and middle leaders in particular, in Catholic secondary schools. *Catholic Schools at a Crossroads (*Catholic Bishops of New South Wales and the Australian Capital Territory, *2007)* emphasised that if Catholic schools are to be successful in preserving the Catholic faith for future generations, then they "must aim to form Christian disciples with an appropriate worldview, character and behaviour" (Sydney Catholic Schools, 2007, p. 14). Therefore, it can be seen that the formation of Catholic school leaders generally, and middle leaders specifically, is critical to achieving these goals. The Bishops had great confidence in the upcoming generation of staff, but they also acknowledged the difficulty in properly forming staff in that regard, knowing that some would have received preparation in secular institutions and would require additional training once they entered the Catholic system.

The document analysis confirmed that in order to encourage people to actively engage in the life, mission, and work of the Catholic faith community, Catholic schools actively support the evangelisation and catechesis mission of the Church. While the documents outline the ecclesial expectations and purpose of Catholic schools, and the role of school leaders generally, the documents do not specifically apply these expectations to the role of middle leaders. While these findings highlight a lack of specificity as to how these expectations apply directly to the middle leader within their leadership role, a need is highlighted for a systematic approach to strengthen faith formation and religious leadership opportunities for middle leaders who are the subject of this study.

These results suggest both a tension between the ecclesial expectations of the Church and the formation policies and programs on offer to middle leaders in Catholic secondary schools to carry out these responsibilities. Does this suggest a misalignment between expectations, policies and programs and that middle leaders are not prepared to carry out their ecclesial responsibilities in leading a Catholic school? This study hopes to explain why the efforts to religiously form middle leaders are not in vain.

Finally, this analysis of documents was instrumental in refining ideas, concepts and categories that assisted the researcher in the development and analysis of both the online survey and the semi-structured interviews. As a result, both the quantitative and qualitative findings of the online survey and the qualitative findings of the semi-structured interviews were better understood as a result of the qualitative findings of the document analysis.

4.3. Research Sub-Question 2

The data presented in this section addresses the second research sub-question of the study, namely:

RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?

This section presents the data obtained from the survey (Sections B, C and D) and the one-to-one semi-structured middle leader interviews. The ecclesial expectations of the Catholic Church were discussed in Section 4.2 of this chapter and set expectations for the identity "the who", as well as the work, "the what" of middle leaders. This evangelising mission of the Catholic school emerged as a theme in the literature discussed in Chapter 2 as the Catholic Church sees that the school has an ecclesial identity (Pope John Paul II, 2001). Lay middle leaders in Catholic schools are expected not only to be leaders in the content of their subject area or in their pastoral responsibilities, but also to find authentic and effective ways of engaging students with their Catholic faith. The assumptions of ecclesial identity that Catholic schools function under must therefore be alive in the persons of middle leaders as these assumptions are not expected in secular schools (Congregation for Catholic Education, 1997). This highlights the role of lay middle leaders in the evangelising mission of the Church through their presence and work in Catholic secondary schools. It is expected that middle leaders carry out their ecclesial roles at a personal, educational and leadership level.

4.3.1. Expression of faith at a personal level

Part B of the survey was designed to elicit information from respondents related to their expression of faith at a personal level. Each part of the survey formed a construct that became the basis for the subsequent development of scales for further data analysis. In general, there was a high level of agreement among respondents regarding most of the statements in the stem items contained with Part B.

4.3.1.1. Descriptive statistical analysis of Part B

The descriptive statistical analysis of Part B consisted of six stem items that examined participants' beliefs about evangelisation within themselves as reflected in their individual behaviour and relationships with others. Frequency distributions were used to determine the sample's understanding of their expression of faith on a personal level and the responses are presented in Table 14.

Table 14

Frequency distributions and descriptive data - Expression of faith at a personal level

B Stem Items	SD (N)	D (N)	Ne (N)	A (N)	SA (N)	Median	Mean	St Dev	SIR
1. I have an adequate understanding of the scriptures that guide my faith.	0	1	12	63	35	4	4.19	.654	0.5
2. I am up-to-date with Catholic teachings.	0	8	28	53	22	4	3.80	.840	0.5
3. I self-articulate my Catholic values. confidently.	0	5	28	46	32	4	3.95	.851	1.0
4. I ensure I allow time for personal prayer.	1	17	16	44	33	4	3.82	1.055	0.5
5. I believe that Jesus is central to my life.	1	5	26	43	36	4	3.97	.909	1.0
6. I explicitly express my Catholic beliefs within my community.	2	11	35	38	25	4	3.66	.995	1.0

Note. N=111; SD=Strongly Agree; D=Disagree; Ne=Neither Agree or Disagree; A=Agree; SA=Strongly Disagree, SIR=Semi Inter Quartile Range.

Of the sample, 88 per cent agree or strongly agree that they have an adequate understanding of the scriptures that guide their faith. A total of 68 per cent of the sample

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agree or strongly agree that they are current in their understanding of Catholic teachings. 70 per cent of the sample indicate that they are able to confidently articulate Catholic values. Interestingly, 31 per cent of the sample indicated that they do not make time for personal prayer and 43 per cent of the sample neither agreed nor disagreed that they explicitly express their Catholic beliefs within the community. Additionally, the semi-interquartile range is larger for the samples self-articulation of Catholic beliefs, belief that Jesus is central to their life, and explicitly expressing Catholic beliefs within the community.

All six items in Part B had a mean above 3.66, indicating overall agreement with each of the stem items. Overall, the standard deviation ranged from .654 (item B1) to 1.055 (item B4), indicating that the responses were relatively tightly clustered around the mean. These data indicate that a significant majority of respondents felt that '*expression of faith on a personal level*,' as defined for this study, and determined by the six items in this scale, is a trait that is strongly supported and identified by middle leader respondents and suggested to the researcher that respondents appear to agree that they express their faith at a personal level.

The mean response value of each individual stem item was computed. These six means were then scaled into one construct: 'informed renewal of personal faith' and, as was reported in Chapter 3, the empirical evidence of the validity of the constructs were guided through factor analysis. Figure 3 shows the frequency of each scaled mean for the construct.

Figure 3

Descriptive statistics – Frequency of scaled means for 'informed renewal of personal faith'
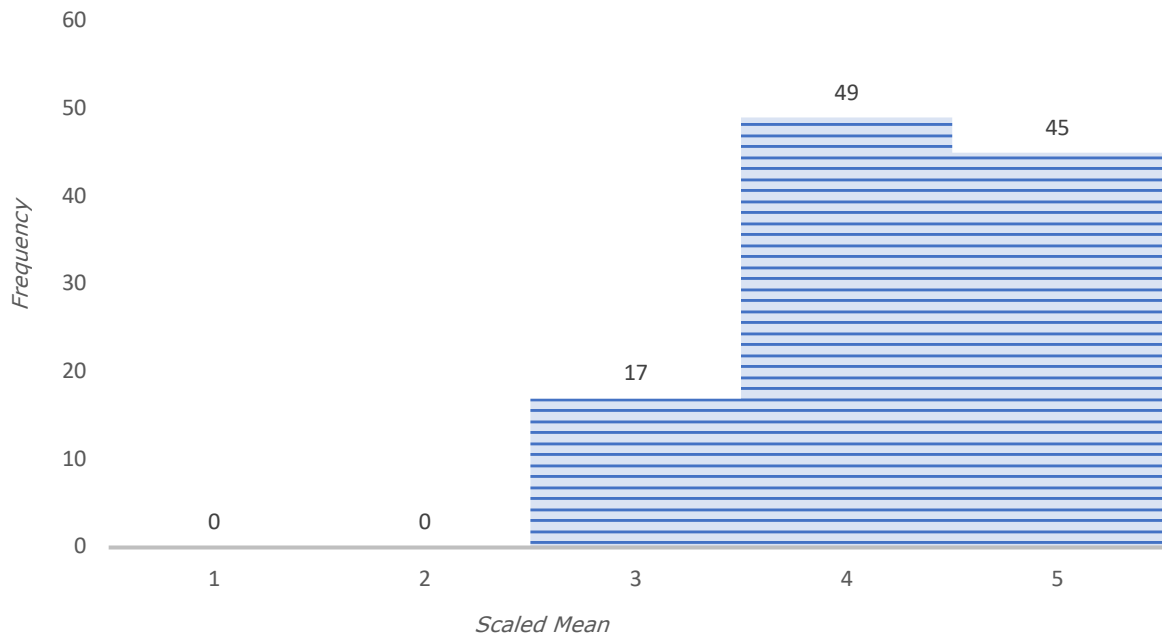
The scaled means of 1 and 2 displayed zero frequencies. The scaled means of 4 and 5 had a combined frequency of 94. The overall mean was 3.898 with a standard deviation of .668, which indicates that 'informed renewal of personal faith', as defined for this study and as determined by the six items in this construct, was well supported by survey respondents.

4.3.1.2. Inferential statistics

The one-way ANOVAs (analysis of variance as described in 4.1) using the construct "informed renewal of personal faith" as the dependent variable and three categories of gender, Catholic schooling and leadership role (RE, KLA, Wellbeing) as independent variables were computed. Effect sizes (i.e. $\eta2$) of approximately 0.06 are commonly considered moderate, while effect sizes greater than 0.14 are considered large (Cohen, 1992). The one-way ANOVAs descriptive statistics summary for the mean and standard deviations for personal faith are displayed in Table 15.

Table 15

ANOVA summary of Mean and Standard Deviations for Personal Faith (B scale)

Scale	N	M	SD	η^2
Gender				.001
Male	58	3.913	.630	
Female	53	3.885	.713	
Catholic schooling				.127
No Catholic schooling	19	3.684	.695	
Secondary school	19	3.798	.654	
Primary school	10	3.816	.615	
Primary and junior and 1 other stage	30	3.727	.607	
Catholic schooling throughout	33	4.257	.622	
Leadership role				.163
RE	12	4.444	.596	
KLA	45	4.011	.567	
Wellbeing	54	3.682	.678	

Note. N=Number; M=Mean; SD=Standard Deviation; η^2=ETA^2; RE=faith related leadership roles; Academic=faculty or subject related leadership roles; Wellbeing=welfare or pastoral leadership roles

The ANOVA using the construct "informed renewal of personal faith" as the dependent variable indicated there were no significant differences on the factor of gender ($p>.05$). On the factors of Catholic schooling and leadership role (RE, KLA, Wellbeing) the univariate F tests were significant at $p<.05$ as shown in Table 16.

Table 16

ANOVA results for Personal Faith (B scale)

Scale	MS Between	MS Within	F	sig
Gender	.031	49.145	.068	.795
Catholic schooling	6.260	42.917	3.885	.006
Leadership role	6.676	42.500	8.483	.000

4.3.1.3. Evangelisation – expression of faith at a personal level

The first open-ended question asked the middle leaders "What do you understand by the term *new evangelisation?"* The responses provided an insight into what the middle leaders understood by the concept of the new evangelisation. This question followed Part A

(demographics) of the survey and preceded the stem items of Part B. The short responses, provided by the middle leaders as presented in the data findings, are identified by the leader's individual identification number (LID). These short responses have been accurately copied from the survey and are included as they appeared in the survey response. Quotes from the semi-structured interviews are identified by each leader's interview number (I).

Seven themes were most prevalent in the open-ended responses. These themes were: orientation towards the spiritual purpose of the school; developing or reinforcing one's own faith; the purpose of the school is to directly evangelise; living the Gospel values; the role of the school towards Catholic mission; differentiation between "traditional" and "new evangelisation"; and evangelisation is the role of school staff. Table 17 presents the themes, together with example citations for each of the three categories that emerged within each theme, and the frequency and percentage for each category for open-ended Question 1.

Table 17

Themes – Open-ended Question 1

Theme	Category	Example citations	F	%
Orientation towards spiritual purpose of the school	A positive orientation	Providing an understanding of Christ for those with limited knowledge.	72	65
		Bringing the faith to baptised Catholics in schools who do not practice their faith by attending mass regularly or participating as a member of their local parish		
		The manner in which we spread the values, moral of Jesus Christ so he is known and loved by today's youth		
	An ambiguous orientation	Evangelisation is to spread the "Good News" of Jesus. I'm not sure what the "new" part is	22	20
	A negative orientation	The Catholic Church trying to entice young people to the Church	5	5
	Orientation Not given	Unsure	12	11
			111	**100**

Theme	Category	Example citations	F	%
Developing or reinforcing one's own faith	Developing one's own faith is explicitly expressed	To me the new evangelisation is the bring the mission of Christ alive and well in our young people today. To build the kingdom of God and the Church so that it lives on through the generations to come.	26	23
	Developing one's own faith is implicitly expressed	Understanding the Gospels in light of the studies which have been carried out over recent decades.	15	14
	Developing one's own faith is not addressed	To spread the word of the Gospels in contemporary society.	70	63
			111	**100**
The purpose of the school is to directly evangelise	The purpose is to directly evangelise	That evangelisation no longer occurs in the traditional forum of the Church on Sundays as Church attendance is low. As such, Catholic schools have an increasing responsibility in the evangelising mission of the Catholic Church.	71	64
	The purpose is not to directly evangelise	Bringing the Gospel message of Jesus through personal interactions with others.	24	22
	Unclear or not given	Getting back to Jesus	16	14
			111	**100**
Living Gospel values	Evangelisation is expressed through living Gospel values	To deepen our spiritual faith and believe in the Gospels and to pass these values on to those around us in our everyday teaching	61	55
	Evangelisation is not expressed through Gospel values	A deepening of faith through personal contact with Christ.	36	32
	Unclear or not given	A re-sharing of faith	14	13
			111	**100**
The role of school is directed towards Catholic mission	The role of the school is directed towards Catholic mission	The relationship you have with Jesus and showing others through your love that they too can have a close relationship with him.	54	49
	The role of school is not directed towards Catholic mission	Spreading the Word of the Gospel in an inclusive way to create a greater awareness among people of various faiths.	41	37
	The role of the school and Catholic mission is not clear or not given	Re-engaging individuals who nominally identify as being Catholic with the Church	16	14
			111	**100**
Differentiation between new and traditional evangelisation	There is a differentiation given	The awakening of evangelisation within the Church since Christ was born. For Catholics today it means reaching out to other Catholics that no longer attend Church or bringing new people to the Catholic faith (missionary work at home & abroad)	31	28
	There is no clear differentiation given	Making the teachings of Christ relevant to the young people of today in today's society	66	59
	Differentiation not given	Bringing the Good News to others in a more direct manner.	14	13
			111	**100**

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Theme	Category	Example citations	F	%
Evangelisation is the role of school staff	Evangelisation is explicitly linked to the role of staff	Bringing the Catholic faith back to young people. Teaching them the mission of the Church.	35	32
	Evangelisation is not explicitly linked to the role of staff	The new evangelisation is John Paul's conception of a response to new cultural realities. In this regard, it an example of the Catholic Pauline emphasis on inner conversion to Christ as a basis for outreach to others and to the wider culture. understanding of tradition as both conserving the essentials of the past as well as responding to new situations and challenges.	75	68
	The role of staff not given	Calls us to deepen our faith	11	10
			111	**100**

Table 17 shows that a total of 72 respondents (65 per cent) had a positive orientation towards the spiritual nature of the school. These responses implied an understanding of the concept and how evangelisation is at the heart of a Catholic school. Mention was made by the middle leaders about the reality that the role of evangelisation now rests with schools and is part of the mission of the school with such comments as *"evangelisation no longer occurs in the traditional forum of the Church on Sundays as Church attendance is low. As such, Catholic schools have an increasing responsibility in the evangelising mission of the Catholic Church"* (LID 4).

However, Table 17 also implies that 26 responses to this question indicated an explicit link between the new evangelisation and developing or reinforcing one's own faith. This represented 23 per cent of the sample. 63 per cent of responses made no reference to one's own faith as part of their response with comments such as *"the call to deeper faith, believe and spread the Gospel message by proclaiming the Gospel"* (LID 104) and *"a fresh approach to spreading the Word of God that will inspire a renewed and deepened faith amongst Christians"* (LID 27).

As is evidenced in the quantitative data, it is clear that the majority of the leaders in the sample understand the purpose of the school. They understand the role of personal prayers, living the values, and the centrality of Jesus. This was supported with a total of 71

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respondents representing 64 per cent of respondents who identified that the purpose of the Catholic school is to directly evangelise. However, there are a minority of voices among them who are either indifferent or do not agree with the ecclesial expectations of the school. Sixteen middle leaders were either unsure or did not believe that this was the purpose of the Catholic school. Comments include: *"bringing the faith to baptised Catholics in schools who do not practice their faith by attending mass regularly or participating as a member of their local parish"* (LID 28) and *"the preaching, teaching, evangelisation to and amongst those who have been lost to the Church"* (LID 79). Most of the surveyed middle leaders understood that the purpose of the Catholic school is to evangelise.

Amongst the 54 per cent of the sample who identified that evangelisation is expressed through living Gospel values, some suggested that demonstrating faith was a key component of the new evangelisation and that modelling the way of Jesus was important. This was expressed by one leader, who said: *"it's the call of the baptised to bring forth in their lives the Gospel message today through their action and words. Being a witness to the Gospel in the modern world and making a difference"* (LID 84). Following this, a total of 49 per cent of the sample identified through their response that the role of the school is directed towards mission. These responses made a direct link between new evangelisation within the school and Catholic mission and see the role of the school: *"to me the purpose of the new evangelisation is to bring the mission of Christ alive and well in our young people today. To build the kingdom of God and the Church so that it lives on through the generations to come"* (LID 29).

Table 17 indicates that the majority of respondents perceived no difference between new and traditional evangelisation. While referencing the new evangelisation, 59 per cent of the sample identified no differentiation whatsoever. Sample comments that highlight this point included: *"to continue to spread the Word of God and to bring people to our faith, using new and contemporary ways"* (LID 160) and *"modernising of the preaching and teaching of*

the Gospel to a contemporary world" (LID 104). 28 per cent of middle leaders identified a difference in their response between the notion of traditional evangelisation and the new evangelisation.

Finally, the data shows that a total of 68 per cent of the responses did not explicitly link the concept of the new evangelisation with that as the direct role of staff. This may indicate the more communal nature of evangelisation and the shared community responsibility to evangelise. Sample responses of where it was explicitly linked included: *"I believe it relates to the role of all teachers in the spiritual and religious education of students"* (LID 123) and "*bringing young people into the Catholic Church by presenting the teachings of the Church in a way which young people can relate to"* (LID 36).

An analysis of semi-structured interviews with middle leaders identified the following themes as expressions of faith at a personal level: religious literacy, mission and purpose, prayer, personal faith life, and personal involvement in parish. Middle leaders frequently referenced the need for religious literacy in their leadership roles. Religious literacy, defined as the beliefs and religious practices of Catholic school leaders, was found by Thompson (2011) for lay people who accepted the call to leadership in Catholic schools to be noteworthy. Such a sentiment was supported by this study's participants. Some of the common references that acknowledged gaps in religious literacy were: "*I may not know it off the top of my head all the time, but I know where to go"* (I7). The same leader went on to say, *"but also I think there's a lot of misunderstanding about what we actually do believe as Christians and as Catholics"* (I7). This acknowledgement that there are times when religious literacy might not be entirely accurate or up-to-date was further elaborated by one leader who said:

> *even some of the scripture passages when we're looking at, they're a little bit out of context, or we might not be entirely sure what Jesus' message was. But I would just say, look, I'm not even entirely sure what the message was from this passage, but for me, it's about X, Y, and Z.* (I8)

One leader noted that teaching RE had an impact on religious literacy, stating, *"I think I am probably not as up-to-date, because I haven't taught religious education for a little while"* (I4). Leaders observed the reality of religious literacy as an expression of their faith as follows: *"well, I guess I try to be as true as possible to the Vatican's teachings but we can also still be Catholic and not agree with that particular Church teaching"* (I8). Comments like those listed above were made by a cross section of participants. One leader summarised their religious literacy as follows: *"I think I'm alright with Catholic teachings"* (I7).

The mission and goals of the Church are significantly influenced by the work of lay teachers and leaders in Catholic schools. One leader spoke about the mission and role of the school in the following way:

> *and if we can do that simply, and if we can do that well, if we just keep bringing it back to the model of Jesus and love for our neighbour, we can make it pretty simple. Sometimes we can over complicate things when we're talking about evangelisation, I just keep coming back to that message.* (I8)

A number of middle leaders in this study also cited fulfilling that mission and purpose in partnership with parents: *"that's where it starts, and in the home. We have to involve the families as well, not just the parish. So, they're getting that from home and they're also getting that from school. I think it's important that connectivity"* (I2). One leader questioned parental support as follows: *"and just on a recent cultural survey we did here at the Catholic part of the school, wasn't mentioned much by the parents"* (I4).

Teachers and leaders carry out a particular Christian calling and play a unique role in the work of the Church, to the point that the Church believes that the success of the Catholic school depends on them. A participating middle leader noted that, *"I see my role as one that makes that connection between the Church, but then makes that connection and makes them see in that significance as well"* (I6). This leader went on to talk about how to renew the mission of the Church: *"I don't see there's any point in jamming things down their throat and using these antiquated words"* (I6) and *"you're trying to make something that is very old and*

they don't have much connection to it" (I6). Another middle leader expressed similar concerns when they stated: "*seemingly, the traditional ways of the Church aren't always working with some of our younger generations"* (I5). This was highlighted by participants.

The next theme that emerged from the analysis of expressing faith on a personal level was prayer. Middle leaders, when talking about prayer, commented, "*we do a bit of a mixture of reflection and formal prayer and that's a really good model"* (I4). Another leader suggested that "*faith begins with prayer. The way I conduct myself with my students, my whole attitude. The way I come across to them and the way I deal with them"* (I2). Another leader continued: "*as an individual, prayer is important and it is part of my faith journey"* (I1). Leaders indicated that prayer is a part of who they are. One leader summarised their understanding of the importance of prayer and the recognition of the need to be authentic by introducing prayer to the students as follows:

> *okay, we're going say this prayer, and we're going to do it this way, So they*
> *can actually see a connection to it, rather than me just standing up and doing a*
> *sign of the cross and saying a Hail Mary just to tick a box. I don't like doing it*
> *that way. I don't see that there's any point in doing that and I think the boys*
> *see right through it. And if anything, I think it detracts from what we're about*
> *and what we're trying to do because they know it's ticking a box.* (I6)

Another leader spoke of the importance of prayer to their personal spirituality when they stated, "*prayer helps me find a sense of peace and security, which I personally think is what people find in prayer anyway. Prayer helps to find that sense of calm"* (I5). They went further and spoke of the nourishing nature of prayer for personal renewal: "*prayer is also talking to my Creator. It's not just your formal prayers. If there's beautiful words that come from the Gospel to me, I write them down in a journal, that's prayer. That's my personal prayer"* (I5). One leader highlighted the importance of prayer:

> *for me, prayer is both a personal journey for me and for the students, but also,*
> *an invitation to be part of the communal element of prayer, as well. I think*
> *communal prayer is important. Because even if you look at the sacraments,*

there's different options. There's your personal options, and your communal options. So, yeah, absolutely prayer is important. Especially in a Catholic school. I like how we start off with prayer at the beginning of the day. (I7)

Leaders spoke about the need for authenticity when it comes to their own personal faith life. This was voiced by one leader who pointed out *that "students are very adept at recognising when you don't know"* (I2). Another spoke of their own sense of honesty in carrying out their responsibilities for evangelisation: *"but with new evangelisation, when we're trying to talk about Jesus' message, it's just trying to be as honest as possible and as genuine as possible"* (I8). In a somewhat opposing way, another middle leader said, *"So I think, whilst I am confident in my own beliefs, and I think I am super-sensitive in how much I share because of the way I think society is right now"* (I3).

Catholic identity is based on the concrete witness of lay men and women in Catholic schools. As such, the faith life of middle leaders is an important issue, particularly where there is an increasing distance from the Church. All of the middle leaders in this study acknowledged the importance of their personal faith life and, as one leader put it, *"it is important to be a role model"* (I5). Another added to this idea by stating that, *you're leading by example, and putting the Gospel values into practice, not just by your words, but also by your actions"* (I7). This leader went on to emphasise the importance of their faith life by adding, *"essentially, that's what Catholic schools are about if you want to go beyond the curriculum"* (I7).

One leader spoke of faith life developing over time and likened it to a journey. They stated that:

> *the outlook that I had on religion ten years ago, is very different to the one I have now, and I'm sure will be very different again in ten years' time. So, it's an ongoing process; a journey. I don't think it's ever stagnant. It's always changing, it's dynamic. And our religious education, in many respects, we're planting seeds for the future. I think I fail my students and the teachers in*

*general if I don't articulate my own Catholicity in a public way and live it out
and if I don't encourage others to do the same.* (I8)

When asked about parish involvement, leaders said that it was an important aspect of their expression of faith on a personal level. One leader spoke of mass attendance as *"pretty significant"* (I8). Another spoke of attending mass as "*a personal choice for me to take the family there most weeks. Everyone is busy and I understand that there are the falling rates of churchgoers on a regular basis, and I guess that's a bit of a reality in a secular world"* (I1). Not all middle leaders view parish involvement in the same way. One leader noted, "*I haven't found an opportunity to integrate the parish so much. I guess I know the Church is there, but I haven't really found the parish so much"* (I5). Another also spoke about the evolving nature of parish involvement, saying, "*I went away from the Church just because you could make that decision, and I was young and impressionable"* (I1). The same leader then went on to express how:

> *over the last, probably, three years, mass attendance has increased. More so, I
> think, as I've become a father with a young family, and things like that, it's
> become more important to me again. My beliefs and things haven't changed.
> But I think now that as I've matured and have a different look on life and, I
> suppose, different priorities in my life, it's starting to become more of a
> priority. So, at the moment, depending on family situations and what's on and
> things like that, at the moment, it's probably once or twice a month.* (I1)

The perspectives of leaders were not always positive. One leader, while noting an increase in Church attendance, questioned the impact it has had on their faith and proceeded to provide an alternate view of how it affects their ability to express their faith to others at the school.

> *But now that I'm becoming more of a regular Church-goer, now that religion's
> becoming more a part of my life, given there's a greater connection to it, does
> it change who I am? No. Has anything changed because I'm going to Church
> more or I'm finding a greater connection with the Church? No. Because it's
> always who I am. Does it make me a better religious educator? Yeah, it does of*

course. And I think that's important that if we're going have Catholic leaders
in Catholic schools, we need to know what we're on about. (I6)

The data collected on this aspect of expression of faith identified differences between the leaders. One point of difference was the leaders' view of the importance of attending mass and the relevance that the parish has on their formation as a middle leader. The idea of faith life was widely supported, and all leaders recognised the need for authenticity and that there was no separation between "the who" and "the what" of their role as faith leaders in a Catholic school. It was clear from the discussions that evangelisation and the centrality of Christ were seen as both the mission and purpose of the Catholic school. This was summed up by one leader who said, *"it's part of working in a Catholic school, taking on a coordinator position, it's a given that you evangelise, you spread the Word and that's why we're teaching in a Catholic school and it's part of the gig"* (I3).

An analysis of the responses indicates that the respondents are more likely to be positive towards the spiritual purpose of a Catholic school and they are less likely to favour spreading the Gospels within their contemporary society. The data also indicates that middle leaders, who were the subject of this study, are likely to agree that evangelisation is not likely to occur through the Church's traditional forums but do accept that the evangelisation is expressed though living the Gospel values. The respondents in this study seem to be divided on the relationship between the role of the school and the Catholic mission and do not differentiate between traditional and new concepts of evangelisation. Overall, the data indicates to the researcher that the respondents seem not to accept the explicit relationship between their roles as leaders and evangelisation.

4.3.2. Expression of faith as a teacher

 Part C of the survey was designed to elicit information from respondents related to their expression of faith as teachers. Each part of the survey formed a construct that became the

basis for the subsequent development of scales for further data analysis. In general, there was

a high level of agreement among respondents regarding most of the statements in the stem

items contained with Part C.

4.3.2.1. Descriptive statistical analysis of Part C

The descriptive statistical analysis of Part C consisted of seven stem items that examined

participants' personal beliefs about evangelisation as reflected in their own beliefs and

practices in pedagogy, curriculum design, and programming. Frequency distributions were

used to determine the sample's understanding of their expression of faith as teachers and

responses are presented in Table 18.

Table 18

Frequency distributions and descriptive data – Expression of faith as a teacher

C Stem Items	SD (N)	D (N)	Ne (N)	A (N)	SA (N)	Median	Mean	St Dev	SIR
1 Jesus is central in my classroom	1	8	28	30	44	4	3.81	.929	1.0
2 Catholic values underpin my teaching programs	0	5	20	48	38	4	4.07	.839	0.5
3 Gospel values inform my pedagogy	1	6	16	55	33	4	4.02	.863	0.5
4 I articulate the teachings of the Catholic Church to my students	0	6	23	49	33	4	3.98	.853	1.0
5 My teaching develops in students an appreciation of Catholic teaching and values	0	4	23	55	29	4	3.98	.786	0.5
6 I ensure that my students are presented with a range of points of view, Catholic and non-Catholic	0	0	13	59	39	4	4.23	.646	0.5
7 I am culturally sensitive	0	1	2	43	65	5	4.55	.584	0.5

Note. N=111; SD=Strongly Agree; D=Disagree; Ne=Neither Agree or Disagree; A=Agree; SA=Strongly Disagree; SIR=Semi Inter Quartile Range.

Table 18 shows that 97.2 per cent of the sample strongly agreed or agreed that they

were culturally sensitive (Item C7). This item had a mean of 4.55, which was the highest

mean in the survey, and a standard deviation of .584, indicating that the responses from the

raw data were tightly clustered around the mean. 88 per cent of the sample agreed or strongly

agreed that they ensure that a range of views, Catholic and non-Catholic, are presented to their students. None of the respondents either disagreed or strongly disagreed with this point. Interestingly, while 79 per cent strongly agreed or agreed that Gospel values inform their pedagogy (C3), 14 per cent indicated that they neither agreed nor disagreed with this item. Six respondents (5 per cent) indicated that they disagreed with this statement. Similarly, nine respondents (8 per cent) disagreed or strongly disagreed that Jesus plays a central role in their classroom, while 25 per cent indicated that they neither agreed nor disagreed. This item (C1) had the lowest mean score of 3.81 in Part C of the survey. Additionally, the semi-interquartile range is larger for the samples belief that Jesus is central in their classroom and the articulation of Catholic Church teaching to students.

All seven items in Part C had a mean above 3.81, indicating overall agreement with each of the stem items. The standard deviation ranged from .584 to .929, indicating that the responses were relatively tightly clustered around the mean. These data indicate that a significant majority of respondents felt that 'expression of faith as a teacher,' as defined for this study and determined by the seven items in this scale, was a trait that was strongly supported and identified by middle leader respondents and suggested to the researcher that respondents appear to agree that they express their faith at a teaching level.

The mean response value of each individual stem item was computed. These seven means were then scaled into one construct – 'Catholic values in teaching'. The empirical evidence of the validity of the constructs were guided through factor analysis. Figure 4 shows the frequency of each scaled mean for the construct.

Figure 4

Descriptive statistics – Frequency of scaled means for 'Catholic values in teaching'
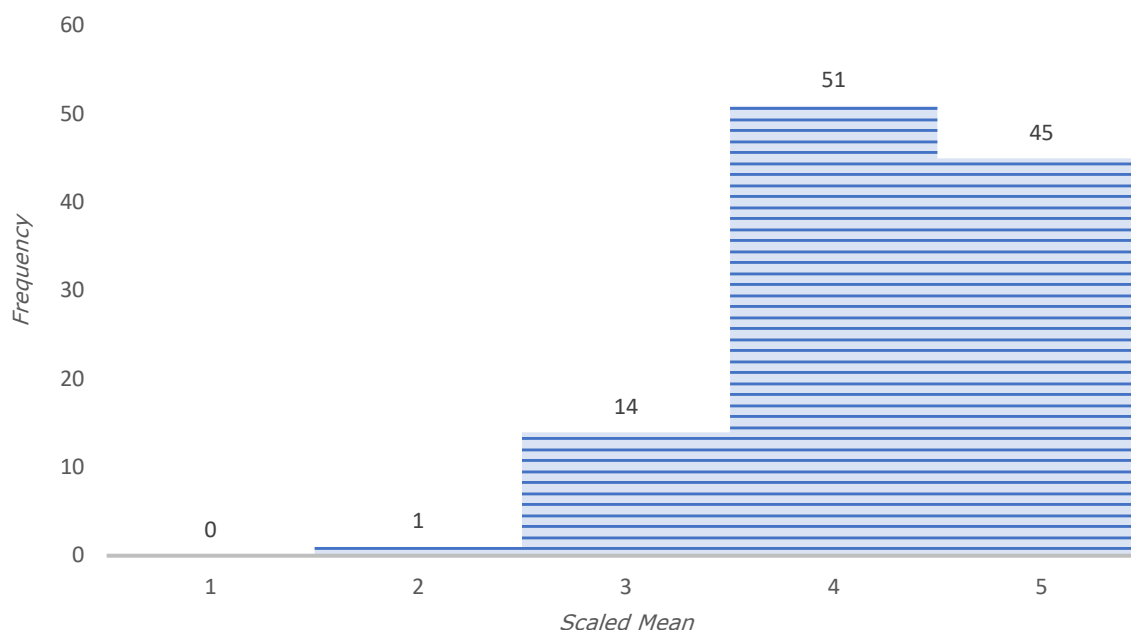
Catholic values in teaching displays zero frequencies with a scaled mean of 1. The scaled means of 4 and 5 had a combined frequency of 96 (86 per cent of the sample). The overall mean score was 3.973 with a standard deviation of .732, indicating that "Catholic values in teaching", as defined for this study and determined by the seven items in this scale was strongly supported by the respondents and that Part C was the second most supported by the sample, following informed renewal of personal faith (Part B).

4.3.2.2. Inferential statistics

The one-way ANOVAs (analysis of variance as described in 4.1) using the construct "Catholic values in teaching" as the dependent variable and three categories of gender, Catholic schooling and leadership role (RE, KLA, Wellbeing) as independent variables were computed. Effect sizes (i.e. $\eta 2$) of 0.01 or less are considered small while effect sizes of approximately 0.06 are commonly considered moderate (Cohen, 1992). The one-way ANOVAs descriptive statistics summary for the mean and standard deviations for "Catholic values in teaching" are displayed in Table 19.

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Table 19

ANOVA summary of Mean and Standard Deviations for Catholic values in teaching (C scale)

Scale	N	M	SD	η^2
Gender				
Male	58	4.078	.591	.001
Female	53	4.107	.622	
Catholic schooling				.062
No Catholic schooling	19	4.052	.593	
Secondary school	19	4.060	.621	
Primary school	10	3.871	.492	
Primary and junior and 1 other stage	30	3.976	.682	
Catholic schooling throughout	33	4.307	.520	
Leadership role				.085
RE	12	4.583	.401	
KLA	45	4.076	.593	
Wellbeing	54	3.997	.605	

Note. N=Number; M=Mean; SD=Standard Deviation; η^2=ETA^2; RE=faith related leadership roles; Academic=faculty or subject related leadership roles; Wellbeing=welfare or pastoral leadership roles

The ANOVA using the construct "Catholic values in teaching" as the dependent variable indicated there were no significant differences on the factors of gender and Catholic schooling. (p>.05). On the factor of leadership role (RE, KLA, Wellbeing) the univariate F tests were significant at p<.05 as shown in Table 20.

Table 20

ANOVA results for Teaching within Catholic Values (C scale)

Scale	MS Between	MS Within	F	sig
Gender	.023	40.085	.063	.802
Catholic schooling	2.468	37.640	1.738	.147
Leadership role	3.392	36.716	4.988	.008

4.3.2.3. Evangelisation – expression of faith as a teacher

The expression of faith as teachers in Catholic schools is seen as essential, expressed in the literature as "teaching is a calling that requires constant renewal of mind, heart, and spirit" (Jackson & Jackson, 2002, p. 285). One leader summed up this sense of teaching when they

said, *"I would see myself as a bit of a fraud if teaching in a Catholic school and only seeing that as a 9–3 job"* (I2). Another leader expressed the same sentiment: *"the Jesus' message was love. As a teacher, religious or not, we need to treat every student with respect, with love and an interest in what they are learning"* (I8). This leader went on to explain that they saw this way of teaching as *"a very simple way of living out the new evangelisation"* (I8). An analysis of the semi-structured interviews with middle leaders identified the following themes as expressions of faith as teachers: professional learning, pedagogy and classroom practice, and Gospel values.

In answering the question of whether formation is part of professional learning, not all leaders agreed. One leader expressed the difficulty in separating the two: *"yes it is and I think it needs to be ongoing"* (I7). Another leader made a clear distinction between faith learning and professional learning, emphasising a difference. They commented that:

> *if it's part of professional development and staff were forced to do a certain thing, I don't think it's authentic. So, it feels if it was purely only done for professional development or to tick a box, I don't think it would be as successful as it could be. But then on the other hand, if you are in a Catholic school, you've got an obligation to support the teachings of the Catholic Church. So, it's a tough question.* (I8)

This viewpoint was supported by another leader who indicated that formation was *"a little bit like professional learning"* (I1). They did stress that *"it's something that I think Catholic school teachers, and in particular, middle leaders should be doing more of"* (I1). Another leader suggested it was both: *"I think it's both. I think it's part of professional learning, but also I think it's part of your own personal learning"* (I3).

Middle leaders agreed on the importance of having a pedagogical style that promotes the values and mission of the Church and the theme of pedagogical approach emerged from the analysis. Pope Francis (2014) posited that "the educator in Catholic schools must be first and foremost competent and qualified but, at the same time, someone who is rich in humanity

and able to be with young people in a pedagogical style that promotes their human and spiritual growth" (p. 6). One leader summed up the importance of their pedagogical approach in this way:

> *through my actions, through my words, the way I deal with challenging students, the way I mark their work, their assessments, the way I give feedback, the types of activities that engage the different types of students, I think I need to be inclusive. I think that inclusiveness, non-judgmental way, and I think that's really important.* (I7)

Another leader spoke of how they try to engage students and have them "*involved in a variety of activities in the classroom that promote Christ*" (I7). The same leader spoke of the "*need to encourage students to talk openly about Christ and all things related to Him*" (I7). This follows another who spoke of how "*the essence of everything is Christ and what is connected to Christ, so not only in the programs that I have written but also in the lessons that I prepare, in what we offer to the students at the school*" (I2). One leader spoke about the tension of expressing their faith in the classroom: "*so there's definitely a tension in what we teach, but the kids pick up on them as well, because they are smart enough to know about these clear Gospel values and the beatitudes are all about*" (I8).

The classroom provides an opportunity for teachers to express their faith. One leader spoke of the "*power of the classroom to plant seeds for the future*" (I8). This was best exemplified by one leader who stated that teaching is a "*way to bring the key messages of the Gospel – love, forgiveness and mercy – into the lives of those who may not necessarily go to Church*" (I1). This was supported by another leader when they stated:

> *It's just about trying to treat all the students in your classroom as equals by being equitable to everyone in your class, showing the same justice to everyone in your class, not playing favourites, and having a love or a genuine interest for the people, the students in your classroom.* (I2)

The Congregation for Catholic Education (1982) emphasises the importance and sanctity of the Catholic lay educator. The Church recognises the ability of teachers in Catholic

schools to guide young people to follow Gospel values as members of the Church. In all interviews, there was consensus on the importance of Gospel values being lived out in all classrooms. One leader summarised: "*it's like I said. It's a little strange because the way I teach is all about respect and being a role model*" (I8). This leader continued: "*it's about teaching students the difference between right and wrong in an appropriate way*" (I8).

One leader emphasised that the expression of faith in the classroom does not always come from one's beliefs when they said:

> *I'm very much about trying to treat everyone as individual. Trying to treat the students with the respect they deserve and expect, trying to always do the greater good and things like that. Now, I know they're underpinned by Gospel beliefs and things like that, but again, coming back to my upbringing, that's not based on Gospel, that's based on my family values of what it means to be a good person. So, the way that I teach, while it is underpinned by Gospel values, it doesn't come from the Gospel values, if that makes sense. It comes from what I've been taught as a person, what I've learnt from those important role models in my life. And while they weren't religious, it's the same lessons. It's the same thing. It's the same values and whatever else. That's the way that I see it.* (I6)

The data collected on this aspect of expression of faith showed differences between the leaders' responses. One point of difference was the leaders' view of pedagogy. There was a named tension about what should be taught in a classroom that meets the expectations of the Church while meeting students where they are, and, how the Holy Father would challenge us to engage in the new evangelisation, as a new means to interpret the Gospel in light of the signs of the time. One leader summed up this tension by saying, "*we are now in a period of time now that we have to really broaden our thinking of the Church and how we deliver that as well, and how we live it*" (I4).

4.3.3. Expression of faith as a leader

Part D of the survey was designed to elicit information from respondents related to their expression of faith as leaders. Each part of the survey formed a construct that became the basis for the subsequent development of scales for further data analysis. In general, there was a high level of agreement among respondents regarding most of the statements in the stem items contained with Part D.

4.3.3.1. Descriptive statistical analysis of Part D

Part D of the survey examined the participants' expression of faith as leaders. The five stem items explored participants' beliefs about evangelisation as expressed in beliefs about their role as a leader in a Catholic secondary school. Frequency distributions were used to determine the sample's understanding of their expression of faith as a leader and the responses are presented in Table 21.

Table 21

Frequency distributions and descriptive data – Expression of faith as a leader

D Stem Items	SD (N)	D (N)	Ne (N)	A (N)	SA (N)	Median	Mean	St Dev	SIR
1 To promote the dignity of each person I encounter	0	0	1	17	93	5	4.83	.402	0
2 To promote the parish as the centre of the local Catholic Church	1	2	38	46	24	4	3.81	.826	0.5
3 To promote an active partnership between home, parish, school and community	0	0	20	46	45	4	4.23	.735	0.5
4 To lead a range of communal prayer experiences in my school	1	3	33	33	41	4	3.99	.929	1.0
5 To work to ensure the school is recognisably Catholic.	1	1	11	47	51	4	4.32	.763	0.5

Note. N=111; SD=Strongly Agree; D=Disagree; Ne=Neither Agree nor Disagree; A=Agree; SA=Strongly Disagree, SIR=Semi Inter Quartile Range.

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The frequency distributions presented in Table 21 show that 99 per cent of the respondents strongly agreed/agreed with item D1, promote the dignity of every person. For this item, only one of the sample responded with neither agree nor disagree. With a mean of 4.32, item D5 showed strong agreement from the sample. For the item with the lowest mean of 3.81 (D2), promote the parish as the centre of the local Catholic Church, 37 per cent of the respondents neither agreed nor agreed (or even strongly disagreed or disagreed) with the statement. Additionally, the semi-interquartile range is larger for leading a range of communal prayer experiences in their school.

All five items in Part D had a mean above 3.81, indicating overall agreement with each of the stem items. Overall, the standard deviation ranged from .402 (item D1) to .929 (item D4), indicating that the responses were relatively tightly clustered around the mean. The data indicate that a significant majority of respondents felt that '*leading faith*' as defined for this study and as determined by the five items in this scale was a trait that was strongly supported and identified by the middle leader respondents and suggested to the researcher that respondents appear to agree that they express their faith at a leadership level.

The mean response value of each individual stem item was computed. These five means were then scaled into one construct: 'leading faith'. The empirical evidence of the validity of the constructs were guided through factor analysis. Figure 5 shows the frequency of each scaled mean for the construct.

Figure 5

Descriptive statistics – Frequency of scaled means for 'leading faith'
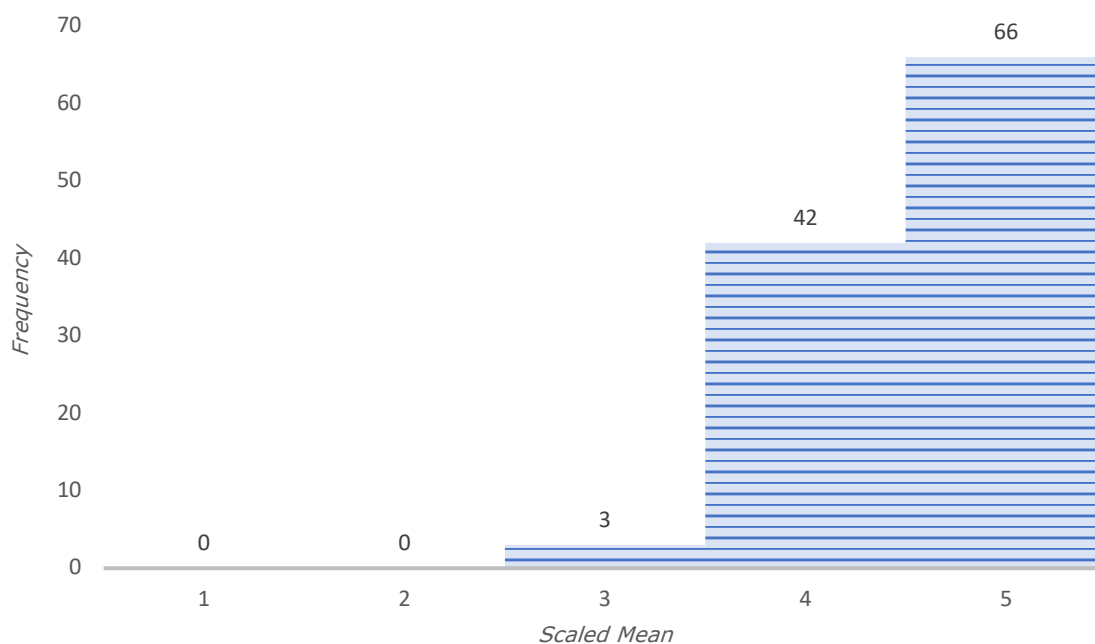
"Leading faith" indicates zero frequencies with a scaled mean of 1 or 2. The scaled means of 4 and 5 had a combined frequency of 108 (97 per cent of the sample). The overall mean score was 4.234 with a standard deviation of 0.580, indicating that "leading faith" as defined for this study and determined by the five items in this scale was strongly supported by respondents and that Part D was most supported by the sample.

4.3.3.2. Inferential statistics

The one-way ANOVAs (analysis of variance as described in 4.1) using the construct "leading faith" as the dependent variable and three categories of gender, Catholic schooling and leadership role (RE, KLA, Wellbeing) as independent variables were computed. Effect sizes (i.e. $\eta 2$) of 0.01 or less are considered small while effect sizes of approximately 0.06 are commonly considered moderate (Cohen, 1992). The one-way ANOVAs descriptive statistics summary for the mean and standard deviations for "leading faith" are displayed in Table 22.

Table 22

ANOVA summary of Mean and Standard Deviations for Leading Faith (D scale)

Scale	N	M	SD	η^2
Gender				.007
Male	58	4.189	.585	
Female	53	4.283	.577	
Catholic schooling				.064
No Catholic schooling	19	4.105	.637	
Secondary school	19	4.284	.530	
Primary school	10	4.020	.599	
Primary and junior and 1 other stage	30	4.140	.628	
Catholic schooling throughout	33	4.430	.490	
Leadership role				.042
RE	12	4.483	.646	
KLA	45	4.297	.533	
Wellbeing	54	4.125	.589	

Note. N=Number; M=Mean; SD=Standard Deviation; η^2=ETA^2; RE=faith related leadership roles; Academic=faculty or subject related leadership roles; Wellbeing=welfare or pastoral leadership roles

The ANOVA using the construct "leading faith" as the dependent variable indicated there were no significant differences on the factors of gender, Catholic schooling and leadership role (RE, KLA, Wellbeing). The univariate F tests are shown in Table 23.

Table 23

ANOVA results for Leading Faith (D scale)

Scale	MS Between	MS Within	F	sig
Gender	.241	36.869	.714	.400
Catholic schooling	2.357	34.752	1.798	.135
Leadership role	1.560	35.550	2.369	.098

4.3.3.3. Evangelisation – expression of faith as a leader

An analysis of the semi-structured interviews with middle leaders identified the following themes as expressions of faith as leaders: lay leadership, advocacy of Gospel values, prayer and co-leadership with the parish.

The importance of expressing faith as a leader was emphasised by all participants. One leader said, "*in terms of developing our leaders as leaders, I think there are opportunities to look at what Catholicism has to offer leaders, and I think that would come through in terms of presence and authenticity and those sorts of things*" (I4). This leader went on to say, "*I think a little more preparation for leaders as leaders would be useful*" (I4). This was reinforced by another leader who highlighted the concept of leadership when they said:

> *I don't know whether it's a question so much, but just an idea that occurs to me is that looking very much at religious formation of the leaders, it opens up the opportunity to look at the formation of leaders generally, and whether people are formed as leaders and then given roles or are they given roles for some other reason and then formed? I think sometimes we get the relationship backwards.* (I5)

Some leaders questioned whether "*all leaders have taken the opportunities on offer*" (I2). Another leader noted the need for formation for middle leaders when they responded:

> *like I know there's year coordinators here who don't feel comfortable doing this sort of stuff. But then again, they haven't made the most of the opportunities that have been afforded to us. So, it's really what you're willing to do that will help you out.* (I6)

The middle leaders interviewed pointed to the added dimension of leadership that comes with leading in a faith-based school. These are in addition to the skills necessary for leadership required in every school. One leader summed this up by stating that "*we are all on a journey*" and "*I do not think there is ever really an end point where you are religiously formed*" (I8). This leader went on to talk about formation for leadership in addition to the faith dimension that could complement faith formation. This leader demonstrated a willingness to engage when they stated, "*I think I would like to study theories of leadership and I am particularly drawn to authentic leadership, which is very much in line with the Catholic approach, or at least it seems to be*" (I8).

The expression of faith as a leader was felt to be easily identifiable by others within the school community. This was summarised as, "*Yeah, I think it's more trying to be genuine. Because students particularly, and staff as well, have pretty good radars if you come across as fake*" (I8). Another leader acknowledged the "*responsibility of every teacher to lead by example and promote this new evangelisation, the Gospel values, the ethics and morals that relate to Catholicism, and just being a good citizen of humanity*" (I7). Comments such as those listed above were evident across the cross section of participants.

The Church recognises the ability of the laity to guide young people to follow Gospel values as members of the Church. Leaders emphasised the importance of Gospel values informing and permeating their work as leaders. One leader indicated that it is these values that guide their leadership:

> *I keep going back to the Gospel values. I think they're the core in religious formation. It's about the formation of both staff and students. That's my understanding of it. I think that it has to come from your leaders in your school. And for me, it's working with those Gospel values and actions and words in the school.* (I7)

When referencing how Gospel values inform leadership, participants were able to describe it in the following ways:

> *For me, it means that, with your Gospel values, that you're trying to lead those to the best of your ability. So, love, forgiveness, being non-judgemental in your actions, in your dealings with people, in your dealings with the students, in your dealings with your colleagues, in your dealings with somebody you meet down the street. That's your theological understanding, and you get a deeper understanding.* (I3)

> *For me, the essence of everything is Christ and what's associated with Christ'* this leader went on to express that you're leading by example, and putting the Gospel values into practice, not just by your words, but also by your actions. *And that preferential treatment of the poor, and I think, essentially, that's what Catholic schools are about, if you want to go beyond the curriculum.* (I7)

All the leaders were asked to respond to the connection they have with the parish as middle leaders in a Catholic school. One leader spoke of their role as "*providing opportunities and letting the community know that we are an extension of the parish, and the parish is an extension of the school*" (I8). This leader also noted, *"but I am a realist, they may never go back to Church"* (I8). Another leader noted the importance of building links with the community when they said, "*but if they turn 25 and want to come to Church, or if they have a child and want to be baptised, they know where to go and there's a Church if they stay around waiting for them to come back*" (I2).

The community nature of Catholic schools and links beyond the parish were also mentioned. One leader commented on building links with the parish:

> *so there are probably a few of the things that we do to build those parish partnerships. And we're very grateful with some of the families as well. We have a couple of mothers and fathers that are part of parishes, that help acolyte at our liturgies. So whenever we have a full school mass, we try to go to the parish, but we're actually too big for the parish now.* (I8)

As was evidenced in the quantitative data, leading a range of communal prayer opportunities was supported by the sample. This belief of the importance of prayer was highlighted by one leader as an expression of their faith as a faith leader in their school who spoke in the following way: *"as a leader, prayer is important. Prayer nourishes me. Yes, I pray as a leader in the school but it is actually part of who I am. You can't fake that sort of stuff"* (I1).

4.3.4. Summary

The data obtained from the survey (Sections B, C and D) and the one-to-one semi-structured middle leader interviews were presented to respond to Research Sub-Question 2 "How do middle leaders in Catholic secondary schools understand their evangelising role?" The Catholic Church foresees the school as having an ecclesial identity (Pope John Paul II, 2001)

and lay middle leaders in Catholic schools are expected not only to be leaders in the content of their subject area or in their pastoral responsibilities, but also to find authentic and effective ways of engaging students with their Catholic faith. This highlights the role of lay middle leaders in the evangelising mission of the Church through their presence and work in Catholic secondary schools.

Findings indicate that middle leaders have a clear understanding of the evangelising role they play in Catholic secondary schools and that they also have an understanding that this can be expressed from a personal, educational and leadership perspective. Middle leaders noted a tension with the currency of their understanding of key Church teachings from a personal perspective, yet felt they had an adequate understanding of the scriptures to guide their faith. Overall, middle leaders had a positive orientation to the new evangelisation and spoke of the importance of prayer and authenticity. Expression of faith at a personal level as expressed as "informed personal renewal" was well supported and identified by the middle leaders.

From a teaching perspective, middle leaders believe themselves to be culturally sensitive but indicate less support for the understanding that Jesus is central in their classroom. Responses confirmed the belief that their evangelising role as a teacher of faith extended beyond the confines of the classroom or timetabled hours. Expression of faith as a teacher, as expressed as *Catholic values in the classroom*, was a trait that was strongly supported and identified by the middle leaders.

Expression of faith as a leader expressed as *leading faith,* as defined for this study, was strongly supported by respondents and that *leading faith* was the most supported by the sample. There was strong support that middle leaders, in their leadership role to evangelise, promote the dignity of each person. All leaders spoke of the importance of having Gospel values permeate their leadership. There was less support for how they, as leaders, promote the parish as the centre of the Church, with one tension raised by middle leaders as the lack of

perceived connection with the parish. The importance of expressing faith as a leader was emphasised by all participants.

Finally, the findings suggest that personal characteristics, such as Church attendance and leadership role also influenced middle leaders' understanding of their evangelising role in achieving the purpose of the Catholic school.

4.4. Research Sub-Question 3

The data presented in this section addresses the third sub-question of the study, namely:

RSQ3 How do middle leaders in Catholic secondary schools perceive their

preparation (formation) to meet their evangelising role?

This section presents data obtained from the analysis of the policy documents, the survey (Part E), and the one-to-one semi-structured middle leader interviews. Part E of the survey examined participants' perceived engagement in formation. The 15 stem items examined religious formation as experienced by middle leaders in Catholic secondary schools. The responses are presented to show engagement in formation opportunities at three levels: from personal, educational and leadership perspectives. Items H1–H3 indicate engagement in formation opportunities at the personal level, items I1–I6 relate to engagement in formation opportunities as a teacher, and finally items J1-J6 relate to engagement in formation opportunities as a leader.

4.4.1. Engagement in formation – Section 1 personal perspective

 Part E (Section 1) of the survey was designed to elicit information from respondents related to their engagement in formation opportunities from a personal perspective. Each part of the survey formed a construct that became the basis for the subsequent development of scales for further data analysis. In general, there was a high level of agreement among respondents regarding most of the statements in the stem items contained with Part E (Section 1).

4.4.1.1. Descriptive statistical analysis of Part E

Part E (Section 1) of the survey examined participants' engagement with formation

opportunities from a personal perspective. The three stem items examined participants' beliefs

about the role of religious formation at a personal level. Frequency distributions were used to

determine the sample's understanding of their engagement in formation opportunities. The

responses are presented in Table 24.

Table 24

Frequency distributions and descriptive data – Engagement in formation opportunities (Section 1)

H Stem Items	NVJ (N)	SD (N)	D (N)	Ne (N)	A (N)	SA (N)	Median	Mean	St Dev	SIR
1 Religious formation helps me grow in my faith	18	0	4	0	54	35	4	3.59	1.708	0.5
2 Religious formation helps develop a deeper understanding of God	16	0	4	0	52	39	4	3.70	1.655	0.5
3 Religious formation helps develop a deeper relationship with God	16	0	4	0	56	35	4	3.67	1.637	0.5

Note. N=111; NVJ=I cannot make a valid judgment; SD=Strongly Agree; D=Disagree; Ne=Neither Agree or Disagree; A=Agree; SA=Strongly Disagree. SIR=Semi Inter Quartile Range.

Table 24 shows that 80 per cent of the respondents strongly agreed/agreed with item

H1 that "religious formation helps me to grow in my faith". Only four of the respondents

disagreed with the statement that "religious formation helps me to grow in my faith".

Interestingly, for H1, 18 frequencies of "cannot make a valid judgment" were recorded,

representing 16 per cent of the sample. H2 and H3 both had frequencies of 16 (and 14 per cent

respectively) with the same sample response. This indicates to the researcher that the sample

may have been uncertain about the importance of religious formation. This was the highest

percentage of the sample that was unable to make a valid judgment on all parts of the survey.

Items H1–H3 had mean scores that ranged from 3.58 to 3.67, indicating that the

sample moderately agreed with the statements. The standard deviations ranged between 1.637

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and 1.708. Item H1, with a standard deviation of 1.708, was the item with the highest variance in the responses in Part E of the survey: engagement in formation opportunities.

The mean response value of each individual stem item was computed. These three means were then scaled into one construct: 'formation for personal faith'. The empirical evidence of the validity of the constructs were guided through factor analysis. Figure 6 shows the frequency of each scaled mean for the construct.

Figure 6

Descriptive statistics - Frequency of scaled means for 'formation for personal faith' (Section 1)
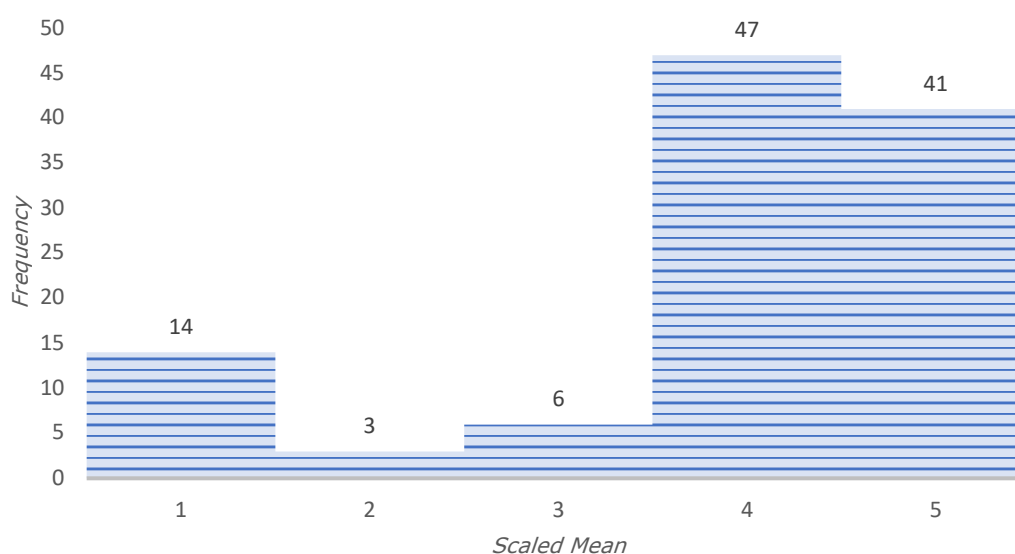
Formation for personal faith displays a combined frequency of 17 with a scaled mean of 1 or 2, representing 15 per cent of the sample. Scaled means of 4 and 5 had a combined frequency of 88 (79 per cent of the sample). The overall mean was 3.655 with a standard deviation of 1.580, which was the largest standard deviation for any of the means in the entire survey and indicates the greatest variance in responses. 'Formation for personal faith' as defined for this study and as determined by the three items in this scale was moderately supported by respondents.

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4.4.1.2. Engagement in formation – personal

The second open-ended question asked middle leaders "What do you understand by the term *religious formation*?" The responses provided insight into what middle leaders understand by the concept of religious formation. This question followed Part D of the survey and preceded the questions that asked for details about formation experiences. The purpose was to collect data and answer the following sub-question:

RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

Seven themes were most prevalent in the open-ended responses. Five themes related to Section 1: Personal perspective. These themes were: orientation towards the role of religious formation; religious formation has a focus on student only; religious formation is concerned with deepening knowledge; religious formation is concerned with deepening faith; and religious formation is more than just a theoretical construct. One theme related to Section 2 – Teaching perspective. This theme was: differentiation between religious formation for teacher and for student. One theme related to Section 3 – leading perspective. This theme was: religious formation supports leadership. Table 25 shows the themes for Section 1, along with sample quotes for each of the three categories that emerged within each theme, and the frequency and percentage for each category for open-ended Question 2.

Table 25

Themes – open-ended Question 2

Theme	Category	Example citation	F	%
Orientation towards the role of religious formation	A positive orientation	Religious formation is to facilitate the knowledge and practice of the Catholic faith at all levels of development, interest and need. It begins when we begin our lives in faith and remains with us until we die or leave the earth.	82	73
	An ambiguous orientation	The development of awareness of and commitment to the practices and beliefs of a particular religion.	14	13
	Orientation not given	I'm not familiar with the term as such but possibly its meaning without realising.	15	14
			111	**100**

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Theme	Category	Example citation	F	%
Religious formation has a focus on student only	A focus on students only	Helping to ensure students understand the role of religion in life	19	17
		The education of (young) people in an understanding of Religion and spirituality. This hopefully enhances the development of their faith.		
	Not just a focus on students	How a person's values, beliefs, ideas about being Catholic are developed (formed)	80	73
	Unclear as to the focus of religious formation	I'm not sure	11	10
			111	**100**
Religious formation is concerned with deepening knowledge	Religious formation is concerned with deepening knowledge	Developing a deep understanding and actions of religious beliefs. This is a lifelong process.	64	58
	Religious formation is not concerned with deepening knowledge	Participation in and support of Catholic faith	37	33
	Unclear or not given	Unsure	11	10
			111	**100**
Religious formation is concerned with deepening faith	Religious formation is concerned with deepening faith	developing the faith of those around us.	69	63
	Religious formation is not concerned with deepening faith	Getting everyone involved	30	27
	Not clear or not given	I'm not sure	12	11
			111	**100**
Religious formation is more than just a theoretical construct	Religious formation is not just a theoretical construct	Continued learning and support of people involved in formal and volunteer capacities in the Church.	61	55
	Religious formation is just a theoretical construct	Studying the faith of the religion including study of scripture (bible study), Church groups, etc.	39	35
	Not clear or not given	I'm not sure	11	10
			111	**100**

Note. F = Frequency; % = percentage

Table 25 shows that 82 respondents answered this question with a positive orientation towards religious formation. These responses implied an understanding of the concept of religious formation, with many respondents pointing to the importance of formation in the context of Catholic secondary schools. An example of such comments was: *"it is the formation of a personal identity that is informed by the values and teachings of the Catholic Church. As a teacher in a Catholic school, our responsibility is to be aware of the need to*

assist in this formation of our students" (LID 13). It should also be noted that no responses

indicated a negative orientation towards the concept of religious formation.

A total of 80 respondents indicated that religious formation in Catholic secondary

schools is not only focused on the students. An example of a common response was: *the*

development of religious faith in people of all ages" (LID 43). A significant portion of the

sample indicated through their responses that religious formation is concerned with deepening

knowledge. A number of responses also indicated that this knowledge is essential for staff: *"it*

is the formation of a personal identity that is informed by the values and teachings of the

Catholic Church. As a teacher in a Catholic school, our responsibility is to be aware of the

need to assist in this formation of our students" (LID 13). 69 per cent of responses indicated

that religious formation is explicitly concerned with the deepening of faith and respondents

often made the link between the concept of formation and faith development. This is

illustrated in the following comment: *"Religious formation is living the Catholic way in all*

forms of our lives. It is not about being private about our faith but being opening and

including it in everything we do. Formation and faith go hand in hand" (LID 34).

Finally, 61 respondents perceived that religious formation is not just a theoretical

construct. A number of responses mentioned experiences of religious formation and that

members of the community were involved in actions that led to formation. Sample comments

included:

> *developing one's spiritual health/connection by bringing people together*
> *through Christian practices such as prayer, scripture, role modelling Gospel*
> *values in everyday situations, Church teachings, reflection days, etc.* (LID
> 153), and

> *Christian formation is to facilitate the knowledge and practice of the Catholic*
> *faith at all levels of development, interest and need. Christian formation is not*
> *confined to any definitive period of time; it truly begins when we begin our*
> *lives in the faith and remains with us until our service on earth is through.*
> *(*LID 148)

An analysis of the semi-structured interviews with middle leaders identified engagement in formation opportunities this way:

> *I think it's important to be able to offer courses and opportunities for middle leaders that help them in their formation. It's developing one's faith, developing and deepening one's faith and spirituality. I think it's really important that leaders have a very good understanding of their own faith formation and their own spirituality. (*I2)

When participants were asked to describe a positive experience with religious formation, there were a significant number of positive responses. Examples of such comments included: "*I managed to experience two of those encounters which I thought were outstanding*" (I3); "*Last year I was given the opportunity to attend, to participate in an excellent residential experience called 'Growing in Faith' and it was an opportunity that could count toward my Master's*" (I2); and "*All these new things that I've learnt have all helped*" (I5). This sentiment was summed up by one leader in the following way:

> *… not only for your own individual spirituality and formation, but also it gave an insight into listening to your colleagues, and them sharing their experiences, and really bond together as Catholic teachers. So I really felt those spirituality experiences influenced, in a very positive way, Catholic teachers at our school.* (I3)

Leaders expressed the outcome of such positive formation opportunities in the following ways: "*through those experiences, I'm more confident*" (I1); "*It just gave me that opportunity to reignite any questions, any doubts, and really affirm my spirituality*" (I3); and "*Because I've got a better understanding, I feel more confident doing it*" (I6). Middle leaders frequently described the relevance of formation opportunities as "*I understand religious formation as an opportunity to learn and grow*" (I1), and "*opportunities to reconnect with my faith*" (I5), and "*I like that it is invitational*" (I5), and "*It is a personal opportunity with a view to evangelise*" (I1).

The analysis of the second open-ended question that asked middle leaders "what do you understand by the term *religious formation*?" provided insight into their individual concepts of religious formation. Comments indicate that the formation experience of the leaders focused on both staff and student formation, that formation focused on religious literacy and that formation experiences provided settings to deepen the faith of participants. There was, however, very little by way of formation experiences, as reported by the respondents, on how to lead faith in their middle leadership roles.

4.4.2. Engagement in formation – Section 2 teaching perspective

Part E (Section 2) of the survey was designed to elicit information from respondents related to their engagement in formation opportunities from a teaching perspective. Each part of the survey formed a construct that became the basis for the subsequent development of scales for further data analysis. In general, there was a high level of agreement among respondents regarding most of the statements in the stem items contained with Part E (Section 2).

4.4.2.1. Descriptive statistical analysis of Part E

Part E (Section 2) of the survey examined participants' engagement in formation opportunities from a teaching perspective. The six stem items examined participants' beliefs about the role of religious education at a teaching level. Frequency distributions were used to determine the sample's understanding of their engagement in formation opportunities, and responses are presented in Table 26.

Table 26

Frequency distributions and descriptive data – Engagement in formation opportunities (Section 2)

I Stem Items	NVJ(N)	SD (N)	D (N)	Ne (N)	A (N)	SA (N)	Median	Mean	St Dev	SIR
1 Religious formation helps me grow professionally	0	0	1	25	59	26	4	3.99	.707	0.0
2 Religious formation is critical to each person's role in Catholic education	0	0	2	34	46	29	4	3.92	.799	0.75
3 Religious formation is critical to what is taught in the classroom	0	1	5	35	49	21	4	3.76	.844	0.5
4 Religious formation is part of professional learning	0	1	2	26	59	23	4	3.91	.769	0.5
5 Religious formation is necessary to adequately teach in a Catholic school	0	3	8	32	48	20	4	3.67	.947	0.5
6 I engage in formation opportunities only as a means to maintain accreditation	0	19	33	30	22	7	3	2.68	1.160	1.0

Note. N=111; NVJ=I cannot make a valid judgment; SD=Strongly Agree; D=Disagree; Ne=Neither Agree or Disagree; A=Agree; SA=Strongly Disagree. SIR=Semi Inter Quartile Range.

Table 26 shows a combined frequency of 85 respondents strongly agreed/agreed with item I1 that religious formation helps me to grow in my profession. This represented 77 per cent of the sample. Only one of the sample respondents disagreed with item I1 stating that religious formation helps me grow professionally. Items I2 to I5 had similar frequencies with 77 per cent (I2), 76 per cent (I3), 77 per cent (I4) and 72 per cent (I5) agreeing (strongly agree/agree) with the stem items. The mean scores for these items ranged from 3.67 to 3.99, indicating moderate agreement with the items.

Item I6 "I participate in formation opportunities only to maintain accreditation" had a mean of 2.68, indicating neither strong agreement nor disagreement with the item. Item I6 had a standard deviation of 1.160, indicating a higher degree of variance between responses compared to the other times in this section of the survey. These data indicate that a significant majority of respondents perceived items I1–I5, as determined by the six items in this scale, as

a trait that was strongly supported and identified by middle leader respondents. Item I6 did not show the same strong support from middle leader respondents.

The mean response value of each individual stem item was computed. These six means were then scaled into one construct: 'formation to enrich teaching in Catholic schools'. The empirical evidence of the validity of the constructs were guided through factor analysis. Figure 7 shows the frequency of each scaled mean for the construct.

Figure 7

Descriptive statistics - Frequency of scaled means for 'formation to enrich teaching in Catholic schools' (Section 2)
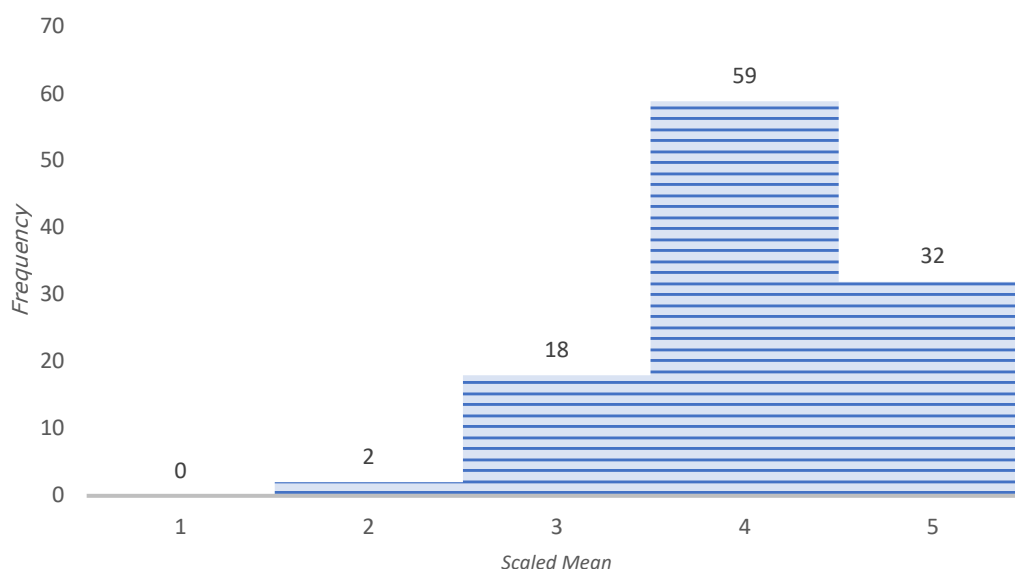
"Formation to enrich teaching in Catholic schools" shows a combined frequency of 91 of the sample with a scaled mean of 4 and 5, representing 82 per cent of the sample. The overall mean was 3.813 with a standard deviation of .725, indicating that there was general agreement with the stem items across the sample. The standard deviation indicated little variance in the responses. "Formation to enrich teaching in Catholic schools", as defined for this study and as determined by the six items in this scale, was supported by the middle leader respondents.

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4.4.2.2   Engagement in formation – teaching

The second open-ended question asked middle leaders "What do you understand by the term *religious formation*?" One theme related to Section 2 – Teaching perspective. This theme was: differentiation between religious formation for teacher and for student. Table 27 shows the themes for Section 2, along with sample quotes for each of the three categories that emerged within each theme, and the frequency and percentage for each category for open-ended Question 2.

Table 27

Themes – open-ended Question 2

Theme	Category	Example citation	F	P
Differentiation between religious formation for teacher and for student	There is a differentiation given	To bring faith close to all, by ensuring all have a formed conscience and that all actions mirror the actions of Christ.	25	23
	There is no clear differentiation given	My understanding is the deepening of Gospel values leading to a better informed knowledge of scripture and the place of God in one's life. One is also then better able to spread the teachings and love of Christ to fellowmen.	75	68
	Differentiation not given	Not a religious teacher so unsure	11	10

Note. F = Frequency; P = percentage (%)

This theme identified that a total of 75 middle leaders noted no difference in their responses between the religious formation of the students or teachers. In contrast, 23 per cent of responses indicated a difference between religious formation for staff and students. The following comment illustrates:

> *religious formation is our response to God's call to Christian life. It can most definitely be one's journey towards a "Religious" vocation or our formation as a member of our Church community. Formation is not simply about the individual but also about the community's journey together.* (LID 47)

Comments from the semi-structured interviews that related to engagement in formation from a teaching perspective revealed a belief that religious formation was important for the teacher. One teacher put it this way:

so again, even with the staff, it's just about providing opportunities. And there's schools that have strong staff that are really Catholic and supportive, every school have some staff that are not so, but you still provide the opportunity for every staff member to come to those. (I8)

Furthermore, when speaking of the need for religious formation for the teacher the same leader said, "*well, I think a teacher that's working in a Catholic school has an obligation to have an understanding, at the very minimum, of religious formation*" (I8).

There were difference of views concerning religious formation and if it was part of professional learning or professional development. One comment indicated:

so, it feels if it was purely only done for professional development or to tick a box, I don't think it would be as successful as it could be. But then on the other hand, if you are in a Catholic school, you've got an obligation to support the teachings of the Catholic Church. (I7)

However, other middle leaders illustrated that religious formation is part of professional learning and included:

to me, formation, it's a little bit like professional learning. It's a little bit like professional development. It's something that I think Catholic school teachers and, in particular, middle leaders should be doing more of. I know the Catholic Education Office of Sydney Catholic Schools also has buy-in to the formation of their staff and they have their own pilgrimage opportunities. And I know they're being taken up. I just think the tricky thing is for your general staff to have a desire to be part of that because I think you nourish your own soul and it enables you to come back with more enthusiasm and more stories to bring back to these kids in terms of evangelisation. (I1)

4.4.3. Engagement in formation – Section 3 leading perspective

 Part E (Section 3) of the survey was designed to elicit information from respondents related to their engagement in formation opportunities from a leadership perspective. Each part of the survey formed a construct that became the basis for the subsequent development of scales for

further data analysis. In general, there was a high level of agreement among respondents

regarding most of the statements in the stem items contained with Part E (Section 3).

4.4.3.1. Descriptive statistical analysis of Part E

Part E (Section 3) of the survey examined participants' engagement in formation

opportunities from a leadership perspective. The six stem items examined participants'

beliefs about the role of religious formation for leadership. Frequency distributions were used

to determine the sample's understanding of their engagement in formation opportunities, and

responses are shown in Table 28.

Table 28

Frequency distributions and descriptive data – Engagement in formation opportunities (Section 3)

J Stem Items	NVJ (N)	SD (N)	D (N)	Ne (N)	A (N)	SA (N)	Median	Mean	St Dev	SIR
1 The Catholic Education Office offers appropriate leadership formation opportunities	0	0	10	12	79	10	4	3.80	.724	0
2 Middle leadership requires participation in religious formation to be relevant	0	2	13	9	56	31	4	3.91	.996	0.5
3 Religious formation assists me in my leadership	0	2	13	9	54	33	4	3.93	1.006	1.0
4 I need to have developed profound Christian faith to function as a leader in a Catholic school	0	2	12	16	59	22	4	3.78	.948	0.5
5 I understand the policy requirements to lead in a Catholic school	19	1	6	0	65	20	4	3.36	1.683	0
6 I engage in formation opportunities only as a means to maintain accreditation	17	6	25	0	40	23	4	3.52	1.29	1.0

Note. N=111; NVJ=I cannot make a valid judgment; SA=Strongly Agree; D=Disagree; Ne=Neither Agree or Disagree; A=Agree; SA=Strongly Disagree. SIR=Semi Inter Quartile Range. The polarity of Item J6 was reversed.

Table 28 shows that not all respondents indicated that they were able to make a valid

judgement on all stem items. A total of 19 respondents were unable to provide a valid

judgment on J5 "I understand the policy requirements to lead a Catholic school", and 17 respondents indicated the same on Item J6 "I engage in formation opportunities only as a means to maintain accreditation". Given the wording of Item J6, the polarity of the responses were reversed and displayed a combined frequency of 63 respondents either strongly agreeing or agreeing with the item, representing 57 per cent of the sample.

Items J1–J4 had mean scores ranging from 3.78 to 3.93, indicating moderate agreement with the items in the sample. A total of 31 respondents (27 per cent of the sample) strongly agreed that participation in religious formation is relevant to middle leadership (Item J2), while Item J3 had a frequency of 33 respondents strongly agreeing with the item "religious formation assists with my leadership". This represented 30 per cent of the sample. The standard deviation for items J1–J4 ranged from .724 to 1.006, indicating little variance between responses.

The mean response value of each individual stem item was computed. These six means were then scaled into one construct: 'formation to support middle leadership'. The empirical evidence of the validity of the constructs was guided through factor analysis. Figure 8 shows the frequency of each scaled mean for the construct.

Figure 8

Descriptive statistics – Frequency of scaled means for 'formation to support middle leadership' (Section 3)
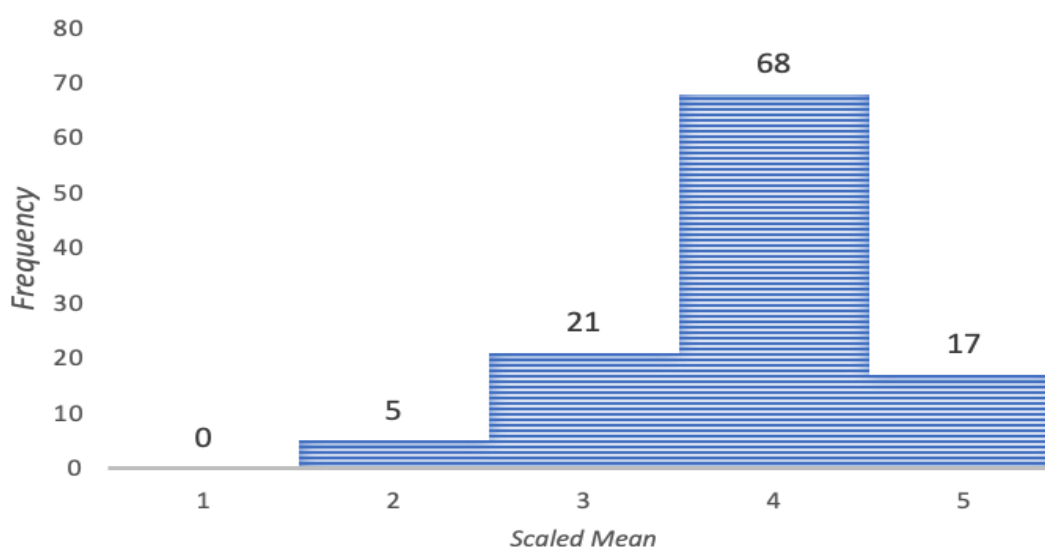
Formation to support middle leadership displays a combined frequency of 85 of the sample, with a scaled mean of 4 and 5, representing 77 per cent of the sample. The overall mean score was 3.808 with a standard deviation of .660, indicating that there was general agreement with the stem items across the sample. The standard deviation showed little variance in the responses. "Formation to support middle leadership", as defined for this study and as determined by the six items in this scale, was supported by the respondents.

4.4.3.2   Engagement in formation – leading

The second open-ended question asked middle leaders "What do you understand by the term *religious formation*?" One theme related to Section 3 – Leading perspective. This theme was: "religious formation for middle leadership". Table 29 shows the themes for Section 3, along with sample quotes for each of the three sub-themes that emerged within each theme, and the frequency and percentage for each sub-theme for open-ended Question 2.

Table 29

Themes – open-ended Question 2

Theme	Sub-Theme	Example citation	F	P
Religious formation for middle leadership	Religious formation supports leadership	Providing individuals with the skills and knowledge necessary to develop a strong sense of their own faith and leadership.	23	21
	Religious formation does not support leadership	The development of ideas around religion and the role of an individual within their community.	76	68
	Not clear or not given	Not a religious teacher so unsure	12	11
			111	**100**

Note. F = Frequency; % = percentage

Only 23 responses (21 per cent) made a link between the religious formation and how it supports middle leadership. The data indicates that 68 per cent of the respondents, who made comments regarding their understanding of religious formation, feel that religious formation experiences do not support or help them in their middle leadership role.

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Data from the semi-structured interviews indicated that two leaders summarised the need for formation to meet leadership requirements as follows: "*it is contradictory. It's hypocritical. It's a conundrum I find myself battling with a lot because it goes against the core of what we do, but I feel as though we are pushed into that position*" (I6), and

you do need to have the paperwork to back you up, even though I know that I'm practicing that faith, and I'm practicing those values to the best of my ability. But I think, in this world, you need the paperwork to back you up. And I think it's also a higher level of understanding, of the depth of your formation. (I7)

This view on formation opportunities for leadership was supported by one leader who stated:

well, there's certain people who are touched for a leadership role, and they're put into the leadership role sometimes before they're ready, sometimes a long time after they're ready. And then we worry about training them, except that we don't really worry too much about training them, we just sort of expect them to hit the ground running and go for it. So, I wonder whether there aren't opportunities to develop our staff earlier than we do. (I5)

4.4.4. Summary

The data obtained from the survey (Section E) and the one-to-one semi-structured middle leader interviews was presented to respond to Research Sub-Question 3: "How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?" Findings indicate that middle leaders understand the nature of the formation opportunities available to them. The data indicates that the sample may have been uncertain about the importance of religious formation and its role in helping one grow in faith, developing a deeper understanding of God, and developing a deeper relationship with God. This section of Part E recorded the highest variance in responses. However, the open-ended responses indicated that middle leaders had a positive orientation to the role of religious

formation and that there was a religious formation focus on staff. "Formation for personal faith", as defined for this study, was moderately supported by respondents.

Formation opportunities from a teaching perspective identified that middle leaders believe that religious formation helps them to grow professionally, and it is critical to their evangelising role and to what is taught in Catholic schools. Although formation opportunities from a teaching perspective were strongly supported by the middle leaders, there was little support for the notion that they engage in formation opportunities only as a means to maintain accreditation. It was also identified that middle leaders did not see a differentiation between religious formation for teachers and students, which might suggest their view is that religious formation applies to all members of the school community. Overall, formation opportunities from a teaching perspective as expressed as "formation to enrich teaching in Catholic schools", as defined for this study, was supported by the middle leader respondents.

Engagement in formation opportunities from a leadership perspective identified, in general, a high level of agreement among respondents. Middle leaders identified that religious formation assists them with their leadership, and that religious formation is relevant to middle leadership. Middle leaders identified very little support for the notion that they engage in formation opportunities for leadership only as a means to maintain accreditation. Engagement in formation opportunities from a leadership perspective expressed as "formation to support middle leadership", as defined for this study, was supported by the respondents.

Finally, at the leadership level, the findings suggest that personal characteristics such as Church attendance, Catholicity, leadership role and Catholic schooling also influenced middle leaders' understanding of the nature of religious formation opportunities offered to them.

4.5. Research Sub-Question 4

As part of the mixed-methods approach to data collection, the data presented in this section addresses the fourth research sub-question of the study, namely:

RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

This section presents the data obtained from the document analysis, survey and one-to-one semi-structured interviews with middle leaders. An analysis of the key documents provides information about the policies and programs offered in the diocese where the research was undertaken. An analysis of the survey data that requested information from respondents on formation, and the positive and less positive formation experiences in which they participated – as well as the semi-structured one-to-one interviews – also provided the researcher with data to address the research sub-question.

4.5.1. Key policy documents

Document analysis (as presented in 4.2) helped the researcher to understand the ecclesial expectations of Catholic school leaders and to determine the purpose, mission, identity and values of Catholic secondary schools. This provided information about the expectations of the Church and, for the purpose of this study, to understand the expectations of the Church for leaders, especially middle leaders, in Catholic secondary schools. These expectations of the Church are clearly stated in *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) where it is stated that Catholic schools should serve as centres for the new evangelisation and that there has to be a critical mass of Catholic educators and leaders in Catholic schools. Also, this document calls on all those working in Catholic education to work to ensure that Catholic schools are truly Catholic in identity, and that students achieve a high level of Catholic religious literacy and practice.

Following the document analysis, three overarching themes emerged that illuminate the ecclesial expectations of school leaders in Catholic secondary schools, and how they specifically apply at the personal, educational and leadership levels for the middle leaders who are the subject of this study. The analysis identified evangelisation and the expression of faith from a personal, educational and leadership perspective.

4.5.2. Personal formation

New Horizons Inspiring Spirits and Minds: Strategic Improvement Plan 2018–2020 (2019) asserts that the goal of Catholic schools is for every student to have a personal encounter with Jesus. Personal formation is animated by *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) and *New Horizons Inspiring Spirits and Minds: Strategic Improvement Plan 2018–2020* (2017) as they propose that all who work in Catholic schools proclaim the Good News by word and deed, and by the example of their lives. This commitment to the mission of the Catholic school is expected to be supported by alignment with one's own specific universe of values.

As presented in 4.3.1, Part B of the survey explored participants' personal beliefs about evangelisation within themselves as reflected in their individual behaviour and relationships with others. The tightly clustered results indicate that a significant majority of respondents believe that "expression of faith on a personal level" is a characteristic strongly supported and identified by middle leadership respondents. It is noticeable that the semi-interquartile range was greater for the stem items *"I self-articulate my Catholic values confidently", "I believe that Jesus is central to my life"* and *"I explicitly express my Catholic beliefs within my community"*. This indicates greater variance in the sample responses, which will be discussed in Chapter 5.

The adequacy of current policies and programs related to personal religious formation to prepare middle leaders to carry out their faith-based responsibilities was explored in the

first open-ended question of the survey, which examined middle leaders' understanding of the term *new evangelisation*. Sixty-five per cent of respondents had a positive attitude toward the spiritual nature of the school and felt that religious formation was critical to the school's success in fulfilling its mission. This was summed up by one leader as, *"Catholic schools have an increasing responsibility in the evangelising mission of the Catholic Church" (*LID 4). Sixty-four per cent of respondents recognised the Catholic school's mission to evangelise directly, and one respondent saw it as *"a fresh approach to spreading the Word of God that will inspire a renewed and deepened faith among Christians"* (LID 27). Respondents acknowledged that living out the values of the Gospel is crucial and that demonstrating the faith is a key component of the new evangelisation. This suggests that those involved in Catholic education have personal faith and can express it. One leader described: *"it's the call of the baptised to bring forth in their lives the Gospel message today through their action and words. To be a witness of the Gospel in the modern world and to make a difference"* (LID 84).

The role of the school, as expressed by the Bishops of New South Wales in *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007), is directed towards Catholic mission and this is articulated in the mission statement of each Catholic school. Middle leaders made a direct connection between the new evangelisation within the school and Catholic mission, and see the role of the school in the following way: *"to me, the new evangelisation is to bring the mission of Christ alive and well in our young people today. To build up the kingdom of God and the Church in such a way that it lives on in the generations to come"* (LID 29). *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) points to a shared responsibility to evangelise. This was evidenced in the sample by comments such as: *"I believe this is related to the role of all teachers in the spiritual and religious education of*

students" (LID 123) and *"bringing young people into the Catholic Church by presenting the teachings of the Church in a way that young people can identify with"* (LID 36).

Mission and purpose, religious literacy, prayer, personal faith life and personal involvement in the parish were all themes mentioned in the semi-structured interviews. Religious formation was noted as a need. One leader stated, *"but I also think there are a lot of misunderstandings about what we actually believe as Christians and Catholics"* (I7). This underlines the need for personal religious formation, because religious literacy is necessary. This view was supported by one leader who stated, *"I think it is really important that leaders have a very good understanding of their own faith formation and their own spirituality and that they also understand that students may not be at that level"* (I4). In contradiction to the documents, some leaders observed the reality of religious literacy as an expression of their faith: *"well, I guess I try to be as faithful as possible to the teachings of the Vatican, but we can still be Catholic and not agree with that particular Church teaching"* (I8). A crucial part of the Church's mission and purpose is played by lay educators and leaders in Catholic schools. One leader summed up this importance by saying, *"if we keep going back to the example of Jesus and loving our neighbour, we can make it pretty easy for ourselves"* (I8). Leaders also acknowledged that faith evolves and formation happens over time. One leader noted: *"the attitude I had towards religion ten years ago is very different from the one I have now, and I am sure it will be very different again in ten years. So it is an ongoing process, I do not think it ever stagnates. It is constantly changing, it is dynamic"* (I8).

It is clear from the documents that the extent to which the Catholic school achieves its goal depends on those who work in the school. One leader noted that personal faith is about *"being as genuine as possible"* (I8), and another: *"I see my role as one that makes that connection between the Church, but then makes that connection and makes them see that significance as well"* (I6). Teaching children about the Church's authoritative teachings while the Church was experiencing a crisis in its authority may have caused dissonance among

teachers and leaders, given the current climate and difficulties the Catholic Church in Australia is facing in the wake of the *Royal Commission into Institutional Responses to Child Sexual Abuse's* revelations (McPhillips, 2018). This was highlighted by one middle leader who said, *"I think I am confident about my own beliefs, but I think I am super-sensitive about the way I see society right now"* (I3).

A crucial built-in construct for laypeople's formative development has long been viewed as weekly mass attendance and parish participation (Dixon, 2005). From this it can be seen that attendance at mass is seen as one-way to support personal religious formation. One leader described attendance at mass as *"pretty significant"* (I8). Not all middle leaders view parish involvement in the same way. One leader noted, *"I have not found an opportunity to engage the community as much"* (I5). Leaders' perspectives were not always positive. One leader noted an increase in Church attendance, but wondered how this affected their faith, and then felt that it affected their ability to express their faith to others in the school: *"I think it's important that if we are going to have Catholic leaders in Catholic schools, we need to know what it's all about"* (I6). Another leader saw attendance at mass in this way: *"I think that being part of a parish gives you a pretty good formation as far as the faith is concerned"* (I8). The way staff in Catholic schools talk to students about attending mass was also mentioned as important by one leader:

> *I think it's really important that the boys see me talk the talk but also walk it. So what I mean by that is I think it's important for the boys to see me set the example. And it's not only just by attending mass and encouraging them to attend, but it's also in the manner in which I speak with them about attending Church, about attending their own parishes with their families. I think it's important dialogue, particularly because there seems to be a dislocation between the family and the Church, the local parish Church. So, I think it's important, as a leader, that we have discussions around why and why not they attend mass.* (I3)

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This underlines the different perceptions of the leaders about the importance of attending mass and the relevance that the parish has for their personal formation. The need for authenticity was supported and there was no separation between "the who" and "the what" of their role as faith leaders in a Catholic school. It was clear from the conversations that evangelisation and the centrality of Christ are seen as both the mission and the goal of the Catholic school. One leader said: *"it's a given that you evangelise, that you spread the word, and that is why we teach in a Catholic school and that is part of the gig"* (I3). This suggests that the concrete witness of Catholic identity is necessary and that *"it is important to be a role model"* (I5). Another added to this idea by saying, *"you lead by example and put Gospel values into practice, not just through your words but also through your actions"* (I7). This leader further emphasised the importance of their faith life by adding: *"essentially, that's what Catholic schools are about if you want to go beyond the curriculum"* (I7). The need for a personal, authentic, concrete witness to Catholic values was expressed by one leader as follows: *"I think I fail my students and teachers in general if I do not publicly articulate and live out my own Catholicity and if I do not encourage others to do the same"* (I8).

As outlined in 4.5.1, Part E (Section 1) of the survey explored participants' engagement with formation opportunities from a personal perspective. Respondents moderately agreed with the three main questions. Of note was the frequency of *"cannot make a valid judgement"*, which was an indication to the researcher that the sample may have been uncertain about the importance of religious formation from a personal perspective; this was the highest percentage of the sample that were unable to make a valid judgement on all parts of the survey. The median score for each stem item was 4 and there was no difference in the semi-interquartile range.

4.5.3. Formation for teaching

The guidelines for faith accreditation of staff in the Archdiocese of Sydney are outlined in the *Accreditation Policy to Work, Teach, and Lead in Sydney Catholic Schools*. The policy was originally approved by the Board of Sydney Archdiocesan Catholic Schools in 2011. The policy was then approved by the Sydney Catholic Schools Leadership Team on 13 August 2015 and by the Executive Director of Sydney Catholic Schools on 29 January 2016. The policy came into effect on 1 February 2016, and was successfully reviewed and approved by the Sydney Catholic Schools Board of Directors Trust Board (formerly Sydney Archdiocesan Catholic Schools) on 27 March 2019 (Sydney Catholic Schools, 2021). The Sydney Catholic Schools Accreditation Policy was introduced to respond to the Bishops' call in 2007. Choosing to work in Catholic education is both a challenge and a privilege, requiring a specific dedication to caring service to students, parents, and colleagues as part of the Church's mission, according to the policy's rationale. (Sydney Catholic Schools, 2016). This is explicitly stated:

> Teachers in Catholic schools, then, are in a most privileged position. It is they who can provide vital guidance and support to parents and students, and instil in them a sense of the Gospel challenge to acknowledge God's integral place in their lives – to believe in [his] Word. This challenge demands certain essential qualities. It requires careful preparation, a facility for reflection, and a constant readiness for professional renewal and conversion of heart. Such teachers bring to their task an extraordinary giftedness and a profound sense of mission which significantly impact on their school communities, on their students and on their own effectiveness. (Sydney Catholic Schools, 2011)

In New South Wales and the Australian Capital Territory, the Bishops instructed that through the interaction with lay staff, students in Catholic schools be "brought to the knowledge and, as far as possible, to the love of the person, life and teaching of Christ and of the Trinitarian God of Love", through the evangelising work of teachers, leaders generally

and middle leaders specifically (*Catholic Schools at a Crossroads*, 2007). Teachers and leaders must make a significant personal commitment in order to use the teaching methods, relationships, and commitment required to produce such a profound result. They are also expected to share their faith experiences with their students outside of the classroom in ways that can influence the students' own religious hermeneutics. Pope Francis urged teachers (and we can assume the Holy Father includes middle leaders) to "above all with your life be witness of what you communicate" (Pope Francis 2013, p. 8).

The Catechism of the Catholic Church (Catholic Church, 1997), which is based on the bible and summarises the codified beliefs and theological knowledge acquired over two millennia, is regarded as vital for middle leaders in their roles as both teachers and leaders and was published in 1997 by the Catholic Church. The Catholic Church recognises the crucial role of teachers in this endeavour: "the importance and the need for catechetical instruction in Catholic schools cannot be sufficiently emphasised. Here young people are helped to grow towards maturity in faith" (Congregation for Catholic Education 2009, p. 51). Here, middle leaders, as teachers, in Catholic schools are expected to communicate the teachings of the Church to their students and to help them grow in their faith and religious knowledge. This component of teaching and leading in Catholic schools requires a certain level of knowledge of the Church's teaching and the teaching methods necessary to communicate this teaching to their students.

As outlined in 4.3.2, Part C of the survey explored participants' beliefs about evangelisation as reflected in their own beliefs and practices in pedagogy, curriculum design and programming. The relatively tightly clustered results indicate that a significant majority of respondents believe that "expression of faith as a teacher" is a characteristic that is strongly supported and identified by middle leadership respondents. All items in Part C had a mean score above 3.81, indicating general agreement with each item in this part of the survey. It is noticeable that the semi-interquartile range was greater for the stem items "Jesus is central in

my classroom" and "I articulate the teachings of the Catholic Church to my students". This indicates a greater variance in the sample responses, which will be addressed in Chapter 5.

The responses of the interviewees presented in 4.3.2.3, were grouped into the themes of professional learning, pedagogy and classroom practice, and Gospel values. Not all middle leaders agreed that formation was part of professional learning. One leader put it: *"if it's part of professional development and staff were forced to do a certain thing, I don't think it's authentic"* (I8). Another leader described the importance of formation for teaching for Catholic teachers as:

> *'Head, Heart and Hands', is that the one? Yeah? Yeah, that I managed to experience two of those encounters which I thought were outstanding. And not only for your own individual spirituality and formation, but also it gave an insight into listening to your colleagues, and them sharing their experiences, and really bond together as Catholic teachers. So I really felt those spirituality experiences influenced, in a very positive way, Catholic teachers at our school.*
> (I3)

The practical application of formation for teaching was also noted where teaching was seen as instrumental to their faith formation:

> *I think it was a very spiritual experience. It's hard to put my finger on it but it was the opportunity to engage in a number of spiritual experiences, prayer, liturgy, those practical sessions as well. There was a lot of talk about having or gaining the knowledge or gaining the experience in that sort of material to get in a path of REC. I think a combination of the practical expression of your faith and then the actual experiential part of it I think was probably what clinched me, what sort of pulled me back. And I really do think it was ...God works in strange ways. God sort of grabbed me and said, 'Right-o, we need you back'.* (I3)

For one leader, the experience of teaching and interacting with students as a practical expression of faith was the core of formation: "*for me, it's been more the contact with the students and the inspiration that comes from them than the contact with the leaders. I think*

there has been some opportunities, but I do not think there has been enough opportunities in terms of a school context" (I7). Being authentic and having real experiences to share as a teacher was important for one leader who stated, *"being in Jerusalem in particular and walking in the footsteps of Christ was a great learning for me personally and is now part of my story that I take into the classroom. And I can talk about making the Gospel come alive"* (I1). This kind of formation then carries over into the teaching, which the same teacher describes as very personal and enriching *"almost life-changing. It is hard to articulate because it is a personal story, but it is a growth in me and in my soul that is reflected in my teaching and in what I bring back"* (I3).

The adequacy of current teacher education policies and programs in preparing middle leaders to carry out their faith-based responsibilities was explored in 4.5.2 Engagement in formation Part E (Section 2) of the survey, which examined participants' engagement in formation opportunities from the teachers' perspective. The data explored participants' beliefs about the role of religious formation in teaching. All respondents were able to make valid judgements and there was general agreement on the stem questions with an overall mean of 3.813 and a standard deviation of 0.725. Of note were the responses to the statements "religious formation is vital to everyone's role in Catholic education" and "I engage in formation opportunities only as a means to maintain accreditation". The first response had a semi-interquartile range of 0.75, while the second response had a semi-interquartile range of 1.0. The latter also recorded the lowest median (3) and the lowest mean (2.68). All other responses in this part of the survey had a semi-interquartile range of 0.5 or less. This will be discussed in Chapter 5.

4.5.4. Formation for leadership

The Sydney Catholic Schools policy *Accreditation to Work, Teach and Lead* (2016) was the only document that specifically named middle leaders as opposed to leaders in general. The

accreditation policy supports the school's mission to engage all staff in the Catholic life of the school. Sydney Catholic Schools, while striving to promote formation for mission, faith development and ongoing professional growth of all staff members, recognise the range of gifts and depth of Catholic faith and knowledge each individual brings, much of which far exceeds the minimum requirements of an accreditation structure.

As was outlined in 4.2.2.1, Category C of the accreditation policy is of particular interest to this study as it addresses formation at the personal, pedagogical and leadership level for middle leaders. The strategic improvement plan 2018–2020 points to opportunities to deepen one's faith life. The *Religious Education and Faith Formation Calendar* (Sydney Catholic Schools, 2018) outlines the formation opportunities to achieve the goals of the strategic improvement plan, with that document being closely aligned with the *Accreditation to Work, Teach and Lead* Policy (Sydney Catholic Schools, 2016). There are programs tailored to teachers, middle leaders and those in higher leadership positions, such as principals and assistant principals. Only one program, the middle leaders retreat, was specifically aimed at middle leaders.

The *Religious Education and Faith Formation Calendar* (Sydney Catholic Schools, 2018) also includes a number of national and international pilgrimages and immersion experiences. In addition to these opportunities, there are a number of professional learning days for staff in religious education leadership positions and opportunities for aspiring religious leaders. This underscores the changing environment of Catholic education that necessitates the continuous identification and development of excellent future leaders who are capable of overcoming a range of obstacles. Religious leadership is highlighted as a priority. Engagement in such faith formation opportunities was expected by all middle leaders who were required to complete a minimum of 45 hours of formation over a five-year period in order to receive and maintain their accreditation.

As outlined in 4.4.1, Part D of the survey explored how participants expressed their faith as a leader and what they thought about their role as a leader in a Catholic secondary school. The relatively tightly clustered results indicate that the majority of respondents felt that "leading faith" is a characteristic that is strongly supported and identified by middle leader respondents. All items in Part D had a mean score above 3.81, indicating general agreement with each item in this part of the survey. It is noticeable that the semi-interquartile range for the stem item "to lead a range of communal prayer experiences in my school" was greater. This suggests greater variance in middle leaders' perceptions of leading prayer in their school context and is discussed in Chapter 5.

Survey respondents were asked to provide an example of a positive formation experience. The responses are shown in Table 30.

Table 30

Positive experience of formation

Formation Experience	F	%
Staff Spirituality Day	20	18
Student Retreat	14	13
Immersion	12	11
Staff Retreat	8	7
Prayer	8	7
Pilgrimage	3	3
Social justice activity	3	3
Further study	2	2
World Youth Day	1	1
Did not name experience	40	35

Note. N=111.

In support of the survey data presented in Table 30, the middle leaders, when interviewed, gave examples that indicated positive engagement with formation opportunities. Comments illustrating this perception included: *"formation opportunities highlight the importance of story and storytelling, and I think that is an important part of faith formation. Linking the story to Gospel stories as well"* (I3); *"to participate in a residential was probably*

a turning point for me. I have always regarded myself Catholic, but that was like a calling for me, and the importance of practicing my faith became evident for future leadership aspirations" (I2); and *"it was not just about dancing and didgeridoos. I was working side by side, eating with them and doing small projects. And also with the elders, not only with the children. It's just powerful stuff"* (I4). The same leader added about immersion: *"so yeah, it got me. I understand now why things happened there, but I think it connected me to Jesus' journey. And we even went up to Nazareth. It was beautiful up there"* (I4). How to make it a positive experience was summarised by a middle leader respondent in the following way:

> *oh, vary it. Appeal to the different types of staff members that you've got. Know your staff first, and then, you'll know how to target your formation opportunities. Something that's engaging, just like your authentic learning. Same thing for your staff. Is it meaningful for your staff? Is it engaging?* (I7)

Survey participants were asked to nominate an example of a less positive formation experience. Responses are displayed in Table 31.

Table 31

Less than positive experience of formation

Formation Experience	F	%
Staff Spirituality Day	24	22
Prayer	3	3
Tertiary study	3	3
Programming day	3	3
Did not name experience	78	69

Note. N=111.

Table 31 indicates that only 30 per cent of respondents named a formation experience. Supporting the data from the survey as displayed in Table 31, the middle leaders when interviewed gave examples that indicated less positive engagement with formation opportunities. Comments illustrating this perception in relation to spirituality days included: *"I thought there was one at my previous school where we had some guest speakers come and I felt as though that what they delivered hurt our spirituality more than helped"* (I3). Other

Chapter 4: Presentation of Results

comments about less positive experiences included: *"I think maybe we should update some of the courses offered"* (I7). Another leader noted that not enough faith formation for leadership is done for leaders: *"I said this to our REC just the other day and she totally agreed with me. I do not think we do enough faith formation here. We have a staff day, which is mandatory. I would like us to do more than just tick a box"* (I2). It is important that formation is invitational and meets participants where they are. One leader summarised this as follows:

> *... and we've got people that are at different levels in their faith. I know that I'm comfortable in my faith, and I know that for me, the Creator Being, the God that I believe in, is very real. I'm constantly speaking with God. I'm constantly acknowledging God's presence, but I think with some of those Spirituality Days, if they come down as forced, I think that turns people off.* (I7)

The need for formation to meet participants where they are at is illustrated by the point:

> *... I think unless people make a decision to go on these sorts of retreats or conferences about Faith Formation, and you sort of take yourself away from your day-to-day activities, people just won't find the time to develop their faith. So maybe if every contract renewal or something, as part of a contract renewal you've got your middle managers to go on a two-day retreat or something, that links in their contract renewal to their faithful nation.* (I8)

How to make engagement in formation a more positive experience was summed up by one middle leader respondent in the following way:

> *The only one that was difficult for me was one that was put on in my first year here by the Catholic Education Office, where it was an overnight retreat style. And it's hard for me to even remember it because it didn't hit the mark, and part of the reason I think it didn't hit the mark is that there was no preparation for it. I simply turned up to it, and there were elements to it that I didn't feel comfortable with. And I don't mind being taken out of my comfort zone, but one of the very first activities was to stand up and to link arms and to chant,*

and immediately it was something I ... It damaged the rest of it, damaged it and I didn't engage with it and I'm very critical of it. (I1)

The response rate to the last open-ended question of the survey "please share an example of how a formation opportunity has influenced your leadership" was low with only 34 per cent of the sample providing an answer. All those who responded gave a positive example. Examples of how formation opportunities positively impacted one's leadership skills included: *"time out to look at myself and my relationship with God. A better relationship and understanding of myself and of God I think helps in relationships with others"* (LID 17); and *"as a non-Catholic but practising Christian I have a much deeper appreciation of the structure of the Church and its doctrines. I can confidently pass that on to the students I teach"* (LID 83). One interviewee noted that there is a lack of formation opportunities for middle leaders. They stated, *"I think it is important to provide courses and opportunities for middle leaders to help them with their training. You can do your own thing, but it would be good if Catholic schools could offer a lot more"* (I7). This view was supported by another leader who stated, *"I think a little more preparation for leaders as leaders would be useful. I also think a little more preparation for teachers as teachers would be useful"* (I5).

In contrast, there were two examples of how the formation opportunity had supported the leader personally. These were:

> *formation has influenced my leadership skills by making me realise that to be a good leader I have to be a good minister to the students and staff under my care. The way I model my faith in my interactions with staff and students can have a positive influence on them* (LID 23), and

> *taking time out from the business of school to participate in formation events like Footsteps at Mittagong, allow me to re-evaluate constantly what is important to me in my faith, and allows an opportunity to work out the best ways to deliver faith opportunities for others.* (LID 45)

In addition, some leaders mentioned ways to improve the relevance of formation opportunities, such as: "*being asked to actively participate, these opportunities would be*

much more engaging" (I6) and "*they could be more relevant if I were a teacher from RE*" (I4). This was reinforced by another middle leader who stated, "*we are not just in religious education, we are all Catholic school teachers, and how can we put the new evangelisation into practice? There must be opportunities*" (I2). Some questioned the relevance of certain experiences and replied: "*spirituality days are nice. I am not quite sure how they relate to religious formation*" (I4). Another spoke about the timing of faith formation opportunities by stating *"... and they are put in the leadership role and then we worry about training them, except we don't really worry too much about training them, we just sort of expect them to hit the ground running and go for it*" (I5). One leader even suggested combining the concepts of authentic leadership and instructional leadership as a model to enhance faith formation opportunities:

> *I'm particularly attracted to authentic leadership, and I think that's very much consistent with the Catholic approach to things, or at least it seems to be. And I like the idea of instructional leadership as well. So, sort of putting those two together in a kind of a model and thinking about how I feel leadership could best happen in a situation like this, it helps me think, well, what do I contribute to that? How do I make that happen in this situation?* (I5)

Participants expressed mixed views on the adequacy of formation for the leadership opportunities offered: "*No, I do not think they are adequate. I think we could do a lot more for faith formation*" (I2) and "*I think it's difficult because it's expensive, it's difficult to get resources when the teacher is not there and everyone is so busy with their own lives that you have to drive 180 miles and have 50 things to do when you get back*" (I8). Another leader raised the issue of opportunities for those who have been in a position for longer: "*I think we need more opportunities, especially for teachers who have been teaching for a long time*" (I7). As noted in the *Religious Education and Faith Formation Calendar* (2018), there are limited faith formation opportunities for middle leaders. One respondent stated, "*They target the people who are in REC positions and maybe teach more religion than others, but they*

sometimes forget everyone else. And I am invited by my role to many things, but often not the religious-based" (I4). Finally, one leader also felt that the annual staff spiritual days did not go far enough: "*I do not think we have enough of them. At the school where I work, there is one such day for staff per year. I think it is important to go beyond that*" (I7). There was also the perception of one leader who believed the adequacy was limited and that financial support for participation in further studies as a form of formation was the impetus for engagement.

> *Well, I think the proof is the fact that Sydney Catholic Schools will pay for you to engage in a Master's of Theology. They will pay your way through, and that's the path you need to gain these different levels of accreditation. And that's, I believe, what attracts the majority of staff to that. I think without that, without having to reach a credential and without having it paid for you, I would doubt whether you'd have many people sitting in a classroom, me included.* (I1)

The engagement of respondents in formation opportunities from a leadership perspective in formation policies and programs in preparing middle leaders to carry out their faith related responsibilities was explored in 4.5.3 Part E (Section 3) of the survey.

This data assisted in understanding the participants' beliefs about the adequacy of role of religious formation for leadership. Not all respondents were able to provide a valid judgement on all stem questions, but there was general agreement on the stem questions with an overall mean of 3.856 and a standard deviation of .819, indicating little variance in responses. Of note were the responses to the statements "religious formation assists me in my leadership" and "I engage in formation only as a means to maintain accreditation". The first statement had a semi-interquartile range of 1.0, while the second had a semi-interquartile range of 1.0. All other responses in this part of the survey had a semi-interquartile range of 0.5 or less.

4.5.5. Summary

The data obtained from the document analysis, survey responses and the one-to-one semi-structured middle leader interviews was presented to respond to answer Research Sub-Question 4: "Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?" The key documents Sydney Catholic Schools *Accreditation Policy to Work, Teach and Lead* (2016) and the Sydney Catholic Schools *Religious Education and Faith Formation Calendar* (2018) detailed the policies and programs offered in the diocese where the research took place. From this it is clear that there are very few formation opportunities specifically aimed at middle leaders. While there was strong quantitative support for the Catholic Education Office providing adequate leadership formation opportunities, the qualitative results showed very mixed results from the middle leaders' responses, which overall raised issues with the adequacy of formation provided for faith leadership in secondary schools from the middle leaders' perspective.

4.6. Chapter summary

The research question that guided the analysis and the findings was:

> *What is the nature and aspects of religious formation that is provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school?*

This question was explored using the various sub-questions:

RSQ1 What are the ecclesial expectations of school leaders in general and middle leadership in particular?

RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?

RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

The discussion is detailed in the following chapter, but the overview of the findings is provided below:

The first research sub-question was addressed using data obtained from the document analysis. The findings suggest that key Church documents provide information about the expectations of the Magisterial Church, which helped the researcher to understand the ecclesial expectations of leaders and, in particular, middle leaders in Catholic secondary schools. However, while these key ecclesial documents provide clarity on the Catholic Church's expectations of the role of school leadership, there is a lack of specificity in terms of how middle leaders carry out their role to achieve the purpose of the Catholic school.

The second sub-question was addressed using the data obtained from the survey (Sections B, C and D) and the one-to-one semi-structured middle leader interviews. The results indicate that middle leaders understand the evangelising role of the Catholic secondary school and also understand that this can be expressed from a personal, educational and leadership perspective. It was recognised that their understanding of key Church teachings is not always current. The expression of faith at a personal level, expressed as "informed personal renewal", was well supported and recognised by middle leaders. The expression of faith as a teacher, expressed as "Catholic values in the classroom", was a trait strongly supported and identified by middle leaders. The expression of faith as a leader, expressed as "leading faith", as defined for this study, was strongly supported by respondents and "leading faith" was most supported by the sample. Personal characteristics such as Church attendance and leadership role also influenced middle leaders' understanding of their role in achieving the Catholic school's purpose.

The third research sub-question was addressed using data from the analysis of the policy documents, the survey (Part E) and the one-to-one semi-structured middle leader interviews. The results indicate that middle leaders understand the type of formation opportunities available to them from a personal, educational and leadership perspective. The data indicated to the researcher that the sample may have been uncertain about the importance of religious formation; overall, however, the middle leaders had positive attitudes about the role of religious formation and that there was a formation focus. While formation opportunities were strongly supported by middle leaders from a teaching perspective, there was little support for the notion that they perceived formation opportunities only as a means to maintain accreditation. Middle leader respondents were generally supportive of formation opportunities from an instructional perspective, described as "formation to enrich teaching in Catholic schools". Respondents agreed that there was generally a high level of support for participation in formation opportunities from a school leadership perspective. Middle leaders indicated that religious formation helps them in their leadership work and that religious formation is relevant to middle leaders. Personal characteristics such as Church attendance and leadership role, Catholicity and Catholic school education also influenced middle leaders' understanding of the type of religious formation opportunities offered to them.

The fourth research sub-question was addressed using data from the document analysis, survey and one-to-one semi-structured interviews with middle leaders. The results indicate that key policy documents provide information on current policies and programs related to the formation of middle leaders. The survey found that middle leaders moderately agreed that the Catholic Education Office provides appropriate opportunities for leadership formation. There were mixed results when mentioning positive or negative formation experiences, and responses from participants varied widely, raising questions about the overall adequacy of the formation programs offered to middle leaders to assist them in carrying out their faith role in furthering the goals of the Church. The findings revealed and

confirmed inconsistencies in the adequacy of formation offered to middle leaders in Catholic

secondary schools.

Chapter 5 will discuss the analysis of these findings.

Chapter 5: Discussion of Results

5.1. Introduction

The focus of this study was on the nature and aspects of religious formation offered to middle leaders and how these middle leaders view their formation experience for leadership. The literature review, as explored in Chapter 2, derived the relevant elements on the purpose of Catholic secondary schools and the preparation (formation for mission) of lay leaders of these schools. The following research question was developed and explored using a mixed-methods case study approach: "*What is the nature and aspects of religious formation that is provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school?*" The major research findings, as explored in Chapter 4, are presented below according to each of the following research sub-questions, which helped guide the gathering of relevant data that enabled the researcher to provide a comprehensive answer to the research question.

RSQ1 **What are the ecclesial expectations of school leaders in general and middle leadership in particular?**

The findings in this research draw attention to the expected ecclesial responsibilities and expectations that are linked with the role of leader in Catholic secondary schools, with a focus on middle leadership in particular. A synopsis of the current literature and analysis of pertinent documents revealed, in particular, two distinct differences between the ecclesial expectations of leading Catholic schools and the specific formation policies and procedures to support the realisation of these expectations.

RSQ2 **How do middle leaders in Catholic secondary schools understand their evangelising role?**

The findings of this study consistently show that middle leaders in Catholic secondary schools are aware of the significant role they play in fulfilling the evangelising mission of the Church. Faith leadership in schools today is predominantly the responsibility of lay leaders, with the need for intentional, ongoing and reflective formation programs being evident. While past religious leadership research has concentrated on principals, it might be argued that principals occupy a classic middle leader role, and so parallels can be established for the purposes of this study.

RSQ3   How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

The findings of this study indicate that if Catholic Schools are to succeed in their mission to evangelise upcoming leaders, the formation of those who have an evangelising role is critical. Findings suggest that the middle leaders in this study perceived their religious formation as relevant to their leadership role and supportive of them in their evangelising role. The importance of lay staff in Catholic schools is emphasised. However, the study revealed that there are limited formation opportunities for middle leaders and there is no evidence that a "one size fits all" approach is appropriate.

RSQ4   Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

The study revealed that Sydney Catholic Schools do provide opportunities for religious formation for leadership but the adequacy of these opportunities is questioned. While a number of strengths of current policies and programs were identified, there were also a number of gaps. Middle leaders in Catholic secondary schools understand the mission of the school and, although current policies and programs aim to support their religious formation, middle leaders believe that the adequacy of religious formation opportunities are optimised when they are characterised by purposeful, relevant and engaging opportunities.

In this chapter, the results reported in Chapter 4 are discussed under the headings that directly answer and are guided by the research question in order to highlight the analysis of data. First, the role of middle leadership within the context of the Catholic secondary schools included in this study is explored, followed by the religious formation of the middle leader participants. Then a reconceptualisation of formation policies and programs offered to middle leaders is presented. This reconceptualisation allows for an understanding of the formation processes at the personal, teaching and leadership levels, and considers Church expectations, personal understanding and orientation of the middle leaders to whom it applies. It also bears witness to the context of the increasingly secular nature of our society.

5.2. Middle leadership in Catholic secondary schools

This study highlights the reality that middle leaders in Catholic secondary schools have additional ecclesial responsibilities beyond the leadership responsibilities of middle leaders in all similar secondary educational contexts. The literature reveals (2.4.1) a clear and engaging argument for the important role of middle leaders (Grootenboer et al., 2020) and that the operational position of middle leaders, allows them to "bridge the educational work of classrooms and the management practices of administrators/leaders" (Grootenboer et al., 2014, p. 509). Middle leadership is separate from principalship, and the two are not interchangeable concepts, despite their similarities (Lipscombe et al., 2021). Middle leaders in Catholic secondary schools bear a significant leadership responsibility, having the educational expectations and responsibilities of all school middle leaders. Middle leaders in Catholic secondary schools are called to exercise pastoral, social, physical and academic leadership responsibilities while, at the same time, exercising ecclesial responsibilities to take forward the religious mission of Catholic schools for which little research has been conducted.

5.2.1. The nature and purpose of secondary Catholic school middle leadership

This section responds to Research Sub-Question 1:

RSQ1 What are the ecclesial expectations of school leaders in general and middle leadership in particular?

The findings revealed, in particular, two distinct differences between the ecclesial expectations of leading Catholic schools and the specific formation policies and procedures to support the realisation of these expectations. The ecclesial expectations of Catholic school leaders – in particular, those in senior leadership roles – is well articulated in both the literature and key magisterial documents, which emphasise the role, purpose and mission of Catholic schools. The same cannot be said for middle leaders in Catholic secondary schools for whom ecclesial expectations are held and who hold an important evangelising role. The study identified that the ecclesial expectations of middle leaders are not explicit and do not specifically address their role. Furthermore, there is no clarity within the policy documents or programs to define the conditions that are seen as essential to ensure the Catholicity of those who hold middle leadership positions within Catholic schools. Although the Bishops sought to appoint committed Catholics to leadership positions, no specificity has been provided to support middle leadership in how to bring these expectations to fruition. Only one policy document, the Sydney Catholic Schools *Accreditation Policy to Work, Teach and Lead in Sydney Catholic Schools* (2016) specifically names middle leaders as opposed to leaders in general. As a result, the findings of this research show that the ecclesial expectations of Catholic school middle leaders are not clearly translated in the myriad of policy documents and religious formation programs available.

The data that form the basis for this discussion of the findings are the magisterial documents presented in Section 4.2. The results show that there is key Church documentation

that emphasises the role, mission and purpose of Catholic schools as part of the Church. As a result, the Catholic Church has very specific, well-defined expectations of personnel in Catholic schools, because the *raison d'être* of the Catholic school, as Gleeson (2015) puts it, is to educate in the Catholic faith. The findings of this study consistently show that middle leaders in Catholic secondary schools are conscious of the critical role they play in the Church's evangelisation mission.

The results of this research indicates an expectation that all those involved in Catholic schooling will dedicate themselves to ensuring the Catholicity of Catholic schools. The aim of the Catholic school is "to proclaim the kingdom by developing within it an ethos and structures that mirror transformation through the living of values that Jesus proclaimed" (McLaughlin, 2000, p. 34). Furthermore, those working in Catholic education, are expected to animate the ecclesial identity of the Catholic school in all aspects of their work and relationships. The magisterial documents reviewed, consistently indicate that schools can only be centres of "new evangelisation" if they are staffed and led by people who contribute to this goal (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007). The data findings show that if schools are to achieve this goal through the life and activities within the school, it must be animated and exemplified through the words, actions and interactions of those working in the school. Middle leaders are expected to actively promote the school's Catholic mission and identity, as well as to willingly and readily evangelise by expressing the message of the Gospel (Pontifical Council for Promoting New Evangelization, 2020).

The results of this study support the Catholic Church's argument that middle leaders' perceived faith is crucial for the long-term preservation of Catholic schools' distinctively religious character, which is confirmed by the work of Buchanan (2020). However, tension exists between these ecclesial expectations and the reality of those who staff Catholic schools. The documents assert that Catholic schools are to be led by faithful Catholics who are ready to embrace the mission of the Catholic Church, are committed to and understand the goals of

Catholic education, and are practicing Catholics who understand and profess the faith through witness and daily example in their lives. Moreover, Catholic school leaders are expected to meet these expectations while humanising education and contextualising the personal, moral and social abilities of those they encounter. This presents an enormous challenge for leaders generally and, for the purpose of this study, middle leaders in particular, as the documents do not delineate how these expectations might be carried out or expressed by middle leaders. This tension is supported by Convey's (2010) earlier study, which highlights the difficulty of determining who understands the mission of the Church and who does not, and from the difficulty of measuring one's own understanding of mission. If evangelisation is crucial to the Church's mission and the Catholic school is the principal arm of the Church, it becomes apparent that it must also be crucial to the school.

The demographic data in this study (Tables 11 and 12) show that, in addition to leadership responsibilities, middle leaders have teaching responsibilities. Middle leaders also possess an evangelising role in the Catholic school, which was affirmed by Pope Paul Vl (1975) who stated that the deepest identity of the Church is that of evangelisation. Because the Catholic school's mission is drawn from the Church's mission, this deep identity of the Church is, by extension, a deep identity of the Catholic school. However, the evangelising role of middle leaders is in addition to the pastoral, social, physical and academic leadership responsibilities they hold. This evangelising role of middle leaders, as presented in Chapter 4, is expressed at a personal, educational and leadership level.

5.2.1.1. Personal witness of middle leaders

The data in this thesis identified Church expectations with regard to the personal witness of faith for staff generally and, for the purposes of this study, of middle leaders in particular. The findings indicate that the NSW and ACT Bishops were clear about the role lay staff should play in relation to faith, life and culture in Catholic schools. The Bishops affirmed that "all

who work in our schools should value their role in welcoming and proclaiming the Good News by word and deed and by the example of their lives" (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007, p. 15). These Church expectations in relation to personal witness are highlighted in the Sydney Catholic Schools *New Horizons Inspiring Spirits and Minds: Strategic Improvement Plan 2018–2020* (Sydney Catholic Schools, 2017), which encourages Catholic schools to hire teachers who are capable of giving Christian witness and contributing to the Church's mission and emphasised the centrality of Catholic schools to the evangelising work of the Church. Although not explicitly stated by the Bishops in *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007), it is assumed that, through their personal witness to the faith, those who work in the school contribute to its Catholic identity and evangelising mission.

The findings reveal that the Church recognises that personal religious witness cannot be imposed and must be accepted or rejected voluntarily (Sydney Catholic Schools, 2017). In the Catholic school, there is a genuine opportunity for staff to engage in a vibrant personal encounter with Christ, and the data show that expectations for all staff are very clearly, openly and transparently stated. The school's Catholic identity and mission are reinforced for leaders and staff upon their appointments, and they are expected to commit both professionally and personally to this objective. This commitment to the Catholic school mission is, therefore, expected to be supported by alignment with their own universe of values. This raises an issue with the expected faith leadership role of leadership – and for the purposes of this study middle leadership – in Catholic schools.

The data findings highlight that explicit attention and direction has not been given to defining exactly what the expectations of the Church are with regards to the personal witness of faith for middle leaders, unlike more senior leadership positions. While the literature recognises that faith is difficult to define (Tillich, 1957), one definition states that it is more

than knowledge of creeds and doctrines (Schipani, 1997). In essence, the "more" of which Schipani (1997) speaks has not been stated explicitly. The Sydney Catholic Schools recruitment policy (Sydney Catholic Schools, 2019), which can also be read in conjunction with the *Accreditation Policy to Work, Teach and Lead in Sydney Catholic Schools* (Sydney Catholic Schools, 2016), states: "recruitment and appointment to particular roles is to be in line with the relevant enterprise agreement, with guidelines applicable to their position and in accordance with the Catholic ethos" (Sydney Catholic Schools, 2019, p. 2).

The results show that while the Sydney Catholic Schools' recruitment policy (2019) specifically aims to define the requirements that are thought to be necessary to ensure the Catholicity of those who hold senior leadership positions within Catholic schools, there is no clarity in the policy to define to define the process and the criteria to achieve the aspired formation for faith within the Catholic tradition. This lack of clarity is also demonstrated in *New Horizons Inspiring Spirits and Minds: Strategic Improvement Plan 2018–2020* (Sydney Catholic Schools, 2017) where it stated: "It is the responsibility of all who work, teach and lead in Catholic schools to nurture partnership in faith, hope and love among students, parents, staff and priests and to embrace evangelisation as a responsibility of the whole school community" (2017, p. 3). The Bishops made it a priority to set expectations for leadership in Catholic schools, and they wanted to make sure that anyone chosen for a leadership position was a faithful Catholic who was willing to accept the current mission of the Catholic school. However, no guidance has been given to middle leadership on how to carry out these expectations.

The data findings indicated that the personal witness expectations for middle leaders are unclear despite a clear message that personal witness of such leaders is important if a Catholic school is to achieve its purpose. The practical application of one's faith – personal witness – is understood by the concept of *praxis*, an Aristotelian term originally referring to any public activity marked by reflection and purpose (Belfiore, 1983). Groome (2014)

presents the concept of *praxis* as a type of reflection demonstrated in outcomes that involve the head (mind), heart (feelings) and hand (actions) of being. For the purpose of this study, and in considering the personal witness expectations of middle leaders, Christian *praxis* is the process of reflection that brings faith to life and life to faith (Sultmann, 2011). This suggests a connection between personal identity and faith, which are intertwined in all aspects of the Christian life. The findings of this research are supported in the literature by Sultmann and Brown (2019), who argue that all members of staff are called to ministry in a Catholic school because each contributes in different ways individually and collectively by witnessing, engaging and acting within the religious dimension of the curriculum, the religious dimension of the school and the religious culture prevalent in processes, structures and systems. The Catholic school promotes God's kingdom and Jesus' person as the core of education and the means by which each human being might be fulfilled. The attributes of God's kingdom are manifested in relationships of love, peace and justice; and the development of a person in Christ is expressed in the individual's behaviours, ideas and judgments from a Christian perspective (McLaughlin, 2000). In other words, the reign of God is shown in the personal witness of faith of those who animate the spirit in Catholic schools.

The personal witness of faith can be expressed in a myriad of ways to contribute to the religious dimension of the school, one such example, as suggested in the documents, being attendance at mass. An expectation from the Church is that leaders in Catholic schools be connected to the parish, as indicated in the policy documents: "leaders must display a demonstrable commitment to the teachings of the Catholic Church in the area of faith and morals along with regular participation in Sunday Eucharist and, more generally in the life of a parish community" (Sydney Catholic Schools, 2019, p. 3). As outlined in Chapter 2 (2.6.3), the literature suggests that worship attendance is declining rapidly. As Rolheiser (2008) explains, "they have not left their Churches, they just do not go anymore. We are not so much post-Christian as post-ecclesial. The problem is not so much atheism or even religious

affiliation, but Church participation" (p. 1). Importantly, this lack of involvement in the Church has not led to staff no longer wanting to work in Catholic schools. When Rolheiser (2008) speaks of Catholic school staff, he says, "They admit their need for God and for spirituality, but not their need for the Church" (p. 1). This suggests that there is a possible gap between what is perceived as core values and the importance of participation in the Church. This highlights the conundrum of how those who work in Catholic schools are authentic through their personal witness of faith and how their work is consistent with that of the Church as one moves further and further away from it. McLaughlin (2002) supports the claim that the majority of Catholic educators, like the Catholic society as a whole, have misgivings about the current Catholic Church and do not practise.

The findings show that personal witness to the faith is critical to the Catholic school's culture, and that the everyday practise of the Gospel is what keeps the relationship with Jesus alive. Miller (2007) supports this notion by stating "what educators do and how they respond is more important than what they say, inside and outside the classroom. This is how the Church evangelises" (p. 58). What staff do and say can be seen as an example of their faith and spirituality, where, specifically, spirituality is "how faith looks in everyday attitudes and behaviours" (Dreyer, 1996, p. 13). Christian spirituality, the individual's response to the Gospel in voice and deed, is a style of life modelled after Christ's person and example. To put it another way, spirituality manifests itself in personal witness.

5.2.1.2. The evangelising role of teachers

The findings of Research Sub-Question 1 confirmed the Catholic Church's expectations of the evangelising role of teachers. The Australian Bishops clearly articulated these expectations by pointing to the important role teachers play in transmitting Catholic faith, life and culture:

> evangelising, forming and otherwise educating our next generation is a task
> for the whole Church; but the Bishops look especially to those involved in our
> schools to make the most of what Pope John Paul II called 'the sense of

adventure' involved in renewing Catholic education.   (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007)

These findings are consistent with not only the work of Rymarz (2010), who articulates the crucial role that teachers play in the religious identity of the school, but also the discussion in *Educating to Fraternal Humanism* (Congregation for Catholic Education, 2017). Based on faith and discernment of the signs of the times, this vision for Catholic schools sees the school's role as developing a civilisation of love and comprehending what it means to be fully human.

This study's findings confirm that the Catholic middle leader as teacher, exercises their most effective and powerful evangelisation through their example, interaction and action, their articulation of faith, and through their participation in the life of the Church. This confirms the earlier magisterial statement:

> in the Catholic school, prime responsibility for creating this unique Christian school climate rests with the teachers, as individuals and as a community. Teaching has an extraordinary moral depth…we must remember that teachers and educators fulfil a specific Christian vocation and share an equally specific participation in the mission of the Church, to the extent that it depends chiefly on them whether the Catholic school achieves its purpose.   (Congregation for Catholic Education, 1997)

This highlights the fundamental precept of *Catholic Schools at a Crossroads* (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007) of the importance to appoint committed Catholics, and emphasises the relevance of lay staff in Catholic schools to advance the mission of the Church. Given dwindling participation rates and Catholic educators' doubts about the modern Catholic Church (McLaughlin, 2002), this may not be realistic or possible. The resulting challenge is to ensure that Catholic schools have sufficient numbers of people who bear personal witness to the mission and purpose of the school. To contextualise this reality, in 2016 only 11.8 per cent of the Catholic population attended mass every week and 61 per cent of Catholic secondary school teachers identify themselves as

Catholic, of whom only 25 per cent regularly attend religious services (National Catholic Education Commission, 2016). Given the importance of lay staff in Catholic schools who carry on the mission of the Church, it is noted that "for most staff, the Catholic school is their only regular experience of Catholicism" (National Catholic Education Commission, 2016, p. 11).

In addition to the demands of systemic responsibility and modern pedagogy, the work of lay teachers and leaders in Catholic schools is difficult because they are also entrusted with major expectations linked to the evangelisation mission of Catholic schools. They are called to acknowledge the presence of God in the milieu of their daily life and to share this with those they teach. This is underscored by Pope Francis (2014) who reminds us that a Catholic school teacher "must be first and foremost competent and qualified, but at the same time someone who is rich in humanity and capable of being with young people in a style of pedagogy that helps promote their human and spiritual growth" (para. 6). *The Catholic School on the Threshold of the Third Millennium* (Congregation of Catholic Education, 1998) even goes so far as to say that teachers must remember that it "depends chiefly on them whether the Catholic school achieve its purpose" (para. 19). For people to perceive their own lives through the same religious hermeneutic, the sharing of oneself is at the centre of evangelisation. How teachers communicate the transcendent features of the Christianity is supported by "the integration of culture and faith [which] is mediated by the other integration of faith and life in the person of the teacher" (Garrone, 1977). This is, however, becoming a more difficult and challenging task, as described by Wilkin (2019), because it requires making an effort to interpret and model the Gospel's message in a way that not only complies with Catholic tradition but also makes the message applicable to students.

Students in Catholic schools will be evangelised by teachers, according to the Bishops of NSW and ACT and "be brought to a knowledge and, as far as possible, love of the person, life and teachings of Christ and of the Trinitarian God of Love" (Catholic Bishops of New

South Wales and the Australian Capital Territory, 2007, p. 14). Teachers in Catholic schools are called to be witnesses to their own religious faith and to communicate their faith experiences with their students in a way that influences students' religious hermeneutics. Pope Francis (2013) urges teachers to "above all, with your life be witnesses of what you communicate" (para. 8). In order to achieve this vision of Pope Francis, Catholic educators need a "formation of the heart: they need to be led to that encounter with God in Christ which awakens their love and opens their minds to others, so that educational commitment becomes a consequence arising from their faith" (Congregation for Catholic Education, 2007, n. 25). The beliefs that middle leaders have about their perception of their role as teachers and as faith leaders are explored in 5.2.2.

5.2.1.3. The evangelising role of middle leaders

This research found that, while exercising the evangelising responsibilities expected of a teacher in Catholic secondary schools, middle leaders also have additional ecclesial responsibilities and, as a result, the Church continues to be concerned about maintaining a critical mass of Catholic staff (including leaders) in Catholic schools (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007). This is highlighted by Grootenboer et al. (2020), who refer to middle leaders as leaders in schools who have an acknowledged leadership position and some teaching responsibilities. These additional ecclesial responsibilities are supported in the literature by Travis and Shimabukuro (1999), who suggest that all leaders in a Catholic school, including middle leaders, should see the Catholic faith as an essential component of the Church's educational mission; that each leader be a person of faith who can share their faith with others; and that they be a person who lives by Gospel values and serves as a role model for students, parents and colleagues. The nature and degree of middle leaders' understanding of the Catholic faith that Travis and Shimabukuro speak of is discussed in the next section of this chapter. However, what has not

been identified, described or quantified is what constitutes a "critical mass", which could be an area for further research.

Consequently, the Sydney Catholic Schools Accreditation Policy (Sydney Catholic Schools, 2011) clarified the desire to ensure this critical mass of Catholic leaders by indicating that "it is the responsibility of all who work, teach and lead in Catholic schools to nurture partnership in faith, hope and love among students, parents, staff and priests and to embrace evangelisation as a responsibility of the whole school community" (p. 1). To follow this strategic direction and embed it in policy, according to the recruitment policy (Sydney Catholic Schools, 2019), which reads in conjunction with the Sydney Catholic Schools Accreditation Policy (Sydney Catholic Schools, 2011), the conditions of appointment include that "all candidates applying for school leadership positions must demonstrate, as an 'essential criterion', a genuine commitment to and support of their Catholic faith and active involvement in a local parish community" (p. 3). The results of the data show that when speaking of school leadership, the intentionality (and focus) is directed mainly towards senior leadership (assistant principal and above) and not middle leadership.

The data also suggest that middle leaders are expected to meet minimum requirements of engagement in formation for mission opportunities to maintain accreditation in order to be eligible for retention in their positions of responsibility. The findings indicate that the accreditation policy (Sydney Catholic Schools, 2011) is another key instrument by which the Archdiocese attempts to ensure that such a critical mass of leaders is appointed. This policy intends to promote the school's objective of including all staff members in the school's Catholic life, with a focus on professional and academic formation, in addition to gaining academic expertise in the areas of religious education and Catholic school administration. The data results also show that this is the only policy that specifically mentions middle leaders. The policy outlines (Table 13) that, in an attempt to ensure the evangelising role of the middle leader, "it is expected that all coordinators and middle managers will complete a minimum of

forty-five hours of formation over a five-year period as a means of maintaining their ongoing accreditation" (2016, p. 6). The involvement of middle leaders in such formation is discussed in Section 5.3.

The findings of this study indicate that, in their pastoral letter, the Bishops suggest that middle leaders in Catholic schools should have sufficient ecclesial understanding to engage in the evangelising mission of the Church that is congruent with that of the Church. *Catholic Schools at a Crossroads* explicitly states that "leaders and staff understand and are firmly committed to the Catholic identity of the school" (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007, p. 10). The challenges for this leadership in the new millennium require leaders to focus on "Jesus and his teaching about God, to help [leaders] become aware of the presence of God's Spirit in them and among them, and to challenge [leaders] to bear strong witness to the presence of that Spirit through the way they live" (Morwood, 1997, p. 114). It is these middle leaders – future senior leaders in Catholic schools operating in a globalised post-modern world – who need to come to terms with the changing Catholic context. These professional and academic challenges for middle leaders in faith leadership are supported by the Bishops in *Catholic Schools at a Crossroads* (2007) who highlight the communal nature of the challenge by suggesting that "evangelising, forming and otherwise educating our next generation is not the task of our schools alone: it requires a common effort from all our families, parishes and agencies" (p. 20). What is not clear from the results is the extent and degree of connectedness middle leaders have to the wider Church community and, in particular, to the parish, as well as the level of support from that community. This too, could be the focus of further research.

5.2.2. Factors that shape middle leadership – perceptions of their evangelising roles

This section responds to Research Sub-Question 2:

RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?

The findings of this question revealed the influence middle leaders have and the instrumental role they play in affecting change within their school context. Although the study demonstrated a match between the intentions and expectations of the Church, and the understanding and expectations of the middle leaders, the formation of middle leaders to prepare them for their religious leadership role has received little attention. Lay middle leaders in Catholic secondary schools are expected not only to be leaders in the pastoral, social, physical and academic domains, but also to find authentic and effective ways of engaging students with their Catholic faith.

The data that form the basis for this discussion of the findings are the quantitative and qualitative data from the survey and the qualitative data from the semi-structured one-to-one interviews. Leadership in faith in Catholic schools is now predominately the responsibility of lay leaders and the middle leaders, who were the subject of this study. The results show that middle leaders in Catholic secondary schools are aware of the significant role they play in fulfilling the evangelising mission of the Church and believe that their evangelising role as a teacher and leader of faith extend beyond the confines of their classroom and offices.

The findings of this study indicate that, while it appears that there is alignment between the expectations of the Church and the understanding of middle leaders, little attention has been paid to the formation of middle leaders to prepare them for their evangelising role, which can be exercised from a personal, educational and leadership level. The literature revealed that middle leadership in the contemporary context of Catholic schooling is complex. Research has shown that middle leadership is crucial for enhancing schools and fostering teacher growth and it is becoming an increasingly essential school leadership position (Bryant, 2019; Gurr & Drysdale, 2013; Lipscombe et al., 2021). However, current research has focused mainly on the learning and teaching aspect of middle leadership

(Bassett, 2016; Gurr & Drysdale, 2013) and little research has been conducted on formation for mission for middle leadership. As noted in the literature, Catholic schools were founded to support the evangelising mission of the Church, which gives rise to an ecclesial responsibility for middle leaders and indeed all staff in Catholic schools. This was aptly summed up by Pope Paul VI (1965), who asserted that teachers and leaders must remember that whether the Catholic school fulfils its purpose depends, above all, on them. One leader spoke simply about the mission and role they play in the school:

> *and if we can do that simply, and if we can do that well, if we just keep bringing it back to the model of Jesus and love for our neighbour, we can make it pretty simple. Sometimes we can over complicate things when we're talking about evangelisation, I just keep coming back to that message* (I8).

5.2.2.1. Personal factors

The results of this study indicate that there is a high level of agreement between middle leaders' personal beliefs about evangelisation, which is reflected in their individual behaviour and relationships with others. All six items in Part B of the survey (Table 14) had a mean score above 3.66, indicating general agreement with each of the questions. Participants' perceptions of a tension between the currency of their personal grasp of major Church teachings and their belief in their appropriate understanding of the scriptures to lead their faith were particularly noteworthy. Overall, middle leaders had a positive orientation to the new evangelisation which is supported by the notion that the Catholic Church foresees the school as having an ecclesial identity.

The results indicate that middle leaders understand the evangelising expectations of the Church (Table 17). The short responses illustrate the understanding of these expectation and were aptly described thus: *"evangelisation no longer occurs in the traditional forum of the Church on Sundays as Church attendance is low. As such, Catholic schools have an increasing responsibility in the evangelising mission of the Catholic Church"* (LID 4).

Respondents acknowledged that the expectation of evangelisation is part of the school: *"it's a given that you evangelise, you spread the Word and that is why we are teaching in a Catholic school and that is part of the mission"* (I3). These findings are consistent with the literature that emphasises the evangelising role of the Catholic school (Congregation for Catholic Education, 1998) and the mission of the Catholic school. These expectations place an enormous responsibility in the hands of those who work, teach and lead in a Catholic school and contribute to the academic and religious formation of their students. The importance of a personal understanding of evangelisation was underpinned by the study of Simonds et al. (2017), which found that seminarians reinterpret the meaning of evangelisation as an effective means of communicating the perennial message of the Gospel. Catholic schools are valuable for the future of the Church, which highlights the important impact that lay teachers and leaders can have in evangelising students in Catholic schools.

This study draws attention to middle leaders' perceptions of the currency and relevance of Catholic teachings. The data points to the challenges associated with the currency of the middle leaders' religious literacy and the impact this has on their ability to self-articulate Catholic values confidently. One leader commented, *"I may not always know off the top of my head, but I know where I need to go"* (I7). This admission would support the middle leaders' strong agreement that they have an adequate understanding of the scriptures that guide their faith. One leader noted the impact of teaching religious education on religious literacy, saying, *"I think I am probably not as up-to-date because I have not taught religious education in a while"* (I4). Another leader took a differing view to religious literacy by indicating *"we can still be Catholic and not agree with a particular church teaching"* (I8). This middle leader went even further to suggest that *"some Archbishops might not necessarily agree with this viewpoint"* (I8). This is supported by the research of Thompson (2011) who found that for such leaders, a commitment to the Catholic Church's doctrines and religious literacy in the Catholic faith are necessary. Although Thompson's study looked specifically at

the role of the principal, it is relevant here because these principals have been through middle leadership and, as indicated earlier, there is little comparable research on the role of middle leadership in Catholic schools.

The perceived lack of religious literacy, as highlighted in this study, could also be explained by the work of Elliott (2019). His research suggests that:

> a corollary to the theory explaining the higher self-efficacy of inexperienced, non-Catholic, non-spiritual teachers may be that teachers with more experience and a stronger intrinsic spirituality have the belief that, because of their experience and spirituality, they acknowledge that there is much they do not know about the doctrines and theology of the Catholic religion. (p. 213)

It could be that the middle leaders in this study are aware of how extensive their field of knowledge is because of their experience in middle leadership, and that they consider their own knowledge to be relatively limited. This view of religious literacy is consistent with Palmer's view that "authenticity is related to teacher identity and integrity" (1998, p. 13). Palmer (1998) noted that it is significant for lay teachers in Catholic schools to link their teaching experiences to scripture and the tradition of the Catholic Church in order to strengthen their authority, identity and integrity. This could be an area for further research.

The results of this research show that the variables of gender, Catholicity and Catholic schooling do not have a significant impact on middle leaders' perceptions of "informed renewal of personal faith". However, the research found that Church attendance and the type of leadership role (Religious Education (RE), Key Learning Area (KLA), wellbeing) held by the respondent (Table 16) did have a significant impact on middle leaders' perceptions of "informed renewal of personal faith". Church attendance had an impact on middle leaders' perceptions, with the data collected showing that there were differences between the leaders' views on the importance of attending mass and the relevance of the parish to their formation as a middle leader. When asked about parish involvement, some indicated that it was an important aspect of their personal expression of faith. One leader described attending mass as

"pretty significant" (I8). Another described attending mass as "*a personal choice for me to take the family there most weeks. Everyone is busy and I understand that the number of regular churchgoers is decreasing, and I think that is a bit of a reality in a secular world"* (I1). In contrast to this view, one leader noted that their own Church attendance had increased but wondered what impact this had had on their faith.

The challenges and impacts of poor Church attendance highlighted in this study were identified by Hughes (2008), whose research found that many of those entering Catholic schools did not personally endorse the teachings of the Catholic Church on important issues. These findings again reinforce that traditional patterns of formation through regular Church attendance can no longer be assumed and this could be seen as one reason for how the sample assessed their ability to confidently articulate Catholic values. As Catholic parents, students and employees turn away from their local Church, the strain on religious leadership becomes even greater. These pressures are also highlighted in the research on Catholic school leadership, which lists a number of influencing factors including a predominately secular workforce, a sizable and significant proportion of non-Catholic students, and non-Catholic staff (Grace, 2002; Quillinan, 2002; Rossiter, 2013). Leadership in faith is embedded in the world in which we live.

The findings of this study reinforce the importance of personal relationships to express faith on a personal level for middle leaders. Following the example of Jesus in all interactions was emphasised by one leader: "*it is the call of the baptised to bring forth in their lives the Gospel message today through their action and words. Being a witness to the Gospel in the modern world and making a difference"* (LID 84). This finding is supported by the research of Gleeson et al. (2018) on teacher identity, which found that faith-based relationships are key because such relationships connect individuals to the Church, and believe these interpersonal connections encourage the growth of the full individual, including their social, academic, and religious development. Leaders affirmed the importance of their personal faith life and how

this translates into their relationships. Personal faith has an impact on all aspects – implicit and explicit – of the role of middle leader, not just on the religious aspect of their leadership. This concept is also supported by Grootenboer et al. (2020), who speak of relational trust being at the core of middle leadership and that it is built through authenticity and modelling. Middle leaders are most effective when they have positive and trusted relationships with students, parents, teachers and senior leaders. As a result, they influence and are influenced by a wide group of people in order to have a beneficial impact on teaching and learning (Lipscombe et al., 2021). This implies that relationships are quintessential in the practice of middle leadership.

Respondents acknowledged the importance of living and modelling their personal faith life. As one leader put it, "*it is important to be a role model*" (I5). Another added to this idea by stating, "*you're leading by example, and putting the Gospel values into practice, not just by your words, but also by your actions*" (I7). Faith life and role modelling are difficult to measure, and when faith is active it needs to be lived and witnessed, seen and expressed. Palmer (1998) believes that "integrity emerges from a complex, demanding and lifelong process of self-discovery" (p. 13) and from a commitment to "live an undivided life" (p. 168). Integrity is a must for a competent teacher to "stand where personal and public meet, dealing with the thundering flow of traffic at an intersection where 'weaving a web of connectedness' feels more like crossing a freeway on foot" (1998, p. 17). This suggests that all our actions emerge from our inner lives. For this reason, Palmer (1998) suggests that teachers need to "become more real" (p. 13). This notion was supported by one middle leader who spoke of a need to be more open when dealing with issues of sexuality and gender. This leader indicated that "*inclusiveness and a non-judgmental way are really important*" (I7). Another leader put it as "*sometimes your viewpoints are not expressed because it might be contrary to the Catholic church. People have an opinion and I have an opinion and it's tricky and you need to be real*" (I1). It is the everyday actions and relationships that animate faith; teachers' efforts are

assessed not only by their quantitative outcomes or accomplishments but also by "how faithfully they treat others with empathy, openness, unconditional love and compassion" (Groome, 1998, p. 148).

In this study, middle leaders were found to strongly endorse and understand their role as faith leaders on a personal level, and responses indicated that middle leaders feel confident in their ability to lead faith from a personal perspective. This strong understanding of their role as faith leaders at a personal level show that there is no separation between the "who" and the "what" of their role as faith leaders in a Catholic school. This highlights the imperative of *nemo dat quod non habet* (no one can give what they do not have); in other words, you need to be formed in your own faith before you can then engage in the faith development of others. An understanding of this faith role was expressed by one non-Catholic middle leader who stated "I think I know more about Catholicism and how to demonstrate it than a lot of other Catholics" (I5).

5.2.2.2. Teaching factors

The findings confirm the effective and powerful evangelisation expressed by the Catholic middle leader as "teacher" through example, interaction and action, and through the articulation of faith in the life of the school as a representative of the Church. These findings add to the literature about whether or not a Catholic school is achieving its purpose is directly related to the teacher (Congregation for Catholic Education, 1997). The Bishops of NSW and the ACT (2007) were clear about the role that lay teachers must play in relation to faith life and culture if schools are to become centres of the new evangelisation. The literature confirms that the teacher as faith leader is crucial to the school achieving its mission and purpose. This is supported by Travis and Shimabukuro (1999), who suggest that all leaders in a Catholic school, as faithful school leaders, should have an understanding of the Catholic faith as integral to the teaching mission of the Church. Participants' ecclesial understanding is

important because it is based on the teaching of the Catholic tradition, which emphasises "that each believer has through the Spirit, the *sensus fidei*, the capacity both to identify what constitutes authentic faith and to choose ways of acting that will embody that faith authentically" (Lennan, 2005, p. 403).

The findings of this study suggest that there is a high degree of alignment among middle leaders' beliefs about evangelisation reflected in their own beliefs about practices in pedagogy, curriculum design and program design. That is, they believe in their evangelising role as teachers. All seven questions in Part C of the survey (Table 18) had a mean score above 3.81, indicating general agreement with each of the questions. This study draws attention to the middle leaders' belief that *"Jesus is central in the classroom"* and that they can "articulate the teachings of the Catholic Church to students". The qualitative findings suggest that middle leaders feel confident in communicating the teachings of the Catholic Church to their students and that teaching develops in students an appreciation of Catholic values. This was expressed by one leader who stated, *"Jesus' message was love. As a teacher, religious or not, we need to treat every student with respect, with love and an interest in what they are learning"* (I8)*,* and that teaching was *"a very simple way of living out the new evangelisation"* (I8). Pope Benedict XVI points out that education is an essential part of the Church's mission to proclaim the Good News (2008). In the New Testament, Jesus is referred to as teacher more than any other epithet, and with great reverence and admiration (Mark 10:17; Matt. 22:16). This can be expressed through the data in this research in that there is strong support for the "centrality of Jesus" in the classrooms of middle leaders.

The results of this study show that there are no differences in the perceptions of the respondents on the composite scale of "Catholic values in teaching" and evangelisation. However, the research found that Church attendance and the type of leadership role (RE, KLA, Wellbeing) held by the respondent had a significant influence on middle leaders' perceptions of "Catholic values in teaching" (Table 20). These findings support the notion

discussed in Section 5.2.2.1, that Church attendance could be considered as a key built-in formative construct for lay people (Dixon, 2005). Those in religious education middle leadership roles (RE) were more likely to perceive a stronger expression of faith at the classroom level than those in curriculum leadership roles (KLA) or welfare roles (Wellbeing).

The study's findings demonstrate that middle leaders are cognisant of the Catholic school's goal and understand its significance for them to uphold in their capacities as educators. These findings, which show that the faith life of teachers is important, are supported by the research of Convey (2010) who highlighted that the faith dimension of teaching in a Catholic school is significant. While Convey's findings confirm the use of religious motivations in choosing to work in Catholic schools, which is a key factor in predicting teachers' job satisfaction, they also highlight the tension that arises from the difficulty in determining who understands the Church's mission and who does not; it is difficult to measure one's understanding of the mission (2010). The results of Cho's (2012) study, which emphasises the significance of faith from the teachers' perspective and concluded that, compared to non-Catholic teachers, the main factors that led Catholic educators to choose to serve at their current Catholic high schools were directly correlated with their religious convictions.

The results in this study show that evangelisation is expressed in the classroom through the teaching and modelling of Gospel values. The findings highlight how leaders see the way they treat people in their classrooms as an expression of their faith. One leader summarised this: *"so, being equitable to everyone in your class, showing the same justice to everyone in your class, not playing favourites, and having a love and genuine interest for the students in your classroom"* (I2). Another leader expressed it in this way: "*it is about looking at ways of bringing the key Gospel messages; love, forgiveness and mercy"* (I1). The classroom is thus seen as a vehicle for the transmission of faith, and the research findings expressed as "Catholic values in the classroom" was a feature strongly supported and

identified by middle leaders. Willems et al. (2012) recognised that teachers can be seen as important socialising agents for their students as role models of virtue. They noted that the importance of this role modelling takes on a deeper dimension in a religious, faith-based school where more than just civic virtues are offered.

The middle leaders in this study felt that Gospel values inform their pedagogy and that as teachers they demonstrate these in a variety of ways. One middle leader stated, *"I think it is the responsibility of every teacher to lead by example and promote this new evangelisation, the Gospel values, the ethics and morals that relate to Catholicism, and just be a good citizen of humanity"* (I7). This is supported in the literature by Havey (2007) who points out that "all staff in our [Catholic] schools can bear a powerful witness to the Gospel through the quality of their relationships with their pupils, who expect knowledge, understanding and respect from their teachers" (p. 334).

The findings show that middle leaders express their faith through pedagogy, and that there is strong support for their articulation of the teachings of the Catholic Church in their classrooms. In light of the literature's descriptions of diminishing Church attendance, this is crucial for the school's evangelising mission. Educational leaders are aware that for the majority of students and families, school is the most significant "Church" experience (Sultmann & Brown, 2019). This is supported by McQuillan's (2009) study which found that staff strongly endorse the importance of religious belief and practise to the life of the school. Mayotte (2010) discusses the function of the teacher and how it is their duty to provide students with a range of means by which to demonstrate their religion. In the classroom, faith must be expressed and made known via encounters, or pedagogy. It needs to be made apparent both during happy times and difficult ones. The faith leadership role of teachers becomes clear when one considers the context. As more people turn away from institutionalised Churches, the number of Catholic secondary students in NSW Catholic schools is increasing (Catholic Education Commission New South Wales, 2011). 69 per cent

of students in Catholic schools reported being Catholic compared to 31 per cent who identified as "non-Catholic" (National Catholic Education Commission, 2016), highlighting the significant challenge of maintaining a "strong Catholic identity" in schools and the important ecclesial responsibility placed on teachers to express their faith through pedagogy in Catholic secondary school classrooms. This challenge is contextualised in the lived reality of schools and there are voices that suggest that, as one middle leader put it "seemingly, traditional ways of church are not working with some of our younger generations" (I8).

While there was strong support for the evangelising role of middle leaders in classrooms, and that "*it is really important that leaders have a good understanding of their own faith formation and their own spiritualty*" (I3), there was a dissonance in the findings that faith formation was seen as part of teachers' overall program of professional learning. One leader expressed the difficulty in separating the two: *"yes, it is [part of professional development] and I think it needs to be ongoing"* (I7). Another leader made a clear distinction between faith formation and professional learning, emphasising the difference: *"I think if it was done just for professional development or to tick a box, it would not be as successful as it could be"* (I8). For one middle leader, faith formation was *"a bit like professional learning"* (I1) and they felt that *"middle leaders should do more of it"* (I1). As a result, teachers require time and opportunity to share their reflections on scripture and tradition with one another. This sounds easier than it usually is in the constant hustle and bustle of teachers' work and lives. In 5.3, middle leaders' perceptions of their involvement in such faith formation opportunities, as well as the appropriateness of this learning, are explored.

In order to shed light on the research findings reported in this paper, and to understand the faith leadership exercised by middle leaders as teachers, it is necessary to look at the experiences of their work in Catholic schools. Every teacher – and in turn middle leader – in the Catholic school community is called to ministry as they contribute to the religious life of the school through their witness, commitment and action in the religious life of the school

(Sultmann & Brown, 2019). Groome (2002) says that theology is the study of how to reconcile faith and living and advises individuals to "consider their lives from the viewpoint of faith and their lives from the viewpoint of faith" (2002, p. 12). Professional development for teachers is mostly about "what" they do or "how" they do their work, but too rarely does it consider the "why". Furthermore, research has found that "teachers are often so preoccupied with the demands of their work that they have little time to reflect on the core values on which their work is based" (Battams, 2002, p. 343). If, as Battams suggests, teachers find little time to reflect on the core values and the "why" of their work as part of their professional learning, one might wonder how their role as faith leaders is nurtured in the classroom. This seems counterproductive to the evangelising expectations of the Church.

5.2.2.3. Leadership influences

The findings of this study suggest that there is a high degree of agreement of middle leaders' beliefs about evangelisation as expressed in their beliefs about their role as leaders in a Catholic secondary school. The data underscore that faith leadership as a lay leader, advocating for Gospel values, leading prayer and building connections with the community is a complex process for middle leaders on which there has been little research. This is supported in the literature, which reveals limited comprehensive investigation of leadership at the middle leadership level unlike that of the role of a secondary principal (Davison, 2006; McEvoy, 2006; Thompson, 2010), a primary principal (Coughlan, 2009; Neidhart, 2016; Neidhart & Lamb, 2011) and a primary and secondary principal (Belmonte & Cranston, 2009; Neidhart & Lamb, 2011; Neidhart & Lamb, 2013) in Catholic schools. The literature draws parallels with this study of middle leaders' faith leadership and is supported by the research of Neidhard and Lamb (2016) who express the need to pay attention to a new generation of faith leaders and to provide training opportunities for future leaders who might not have the necessary knowledge, abilities, or attitudes to take on the burden of serving as a faith leader in

Catholic schools. This could explain why, according to Stern and Buchanan (2020), an insufficient number of appropriately qualified middle leaders are presently seeking positions as principals in Catholic schools. The future of Catholic schools depends on the middle leaders on whom this study is focused and their willingness to take up the challenges of religious leadership in secondary schools.

The findings of this study suggest that middle leaders, through their leadership practices, carry the evangelising mission of the Church. That is, they believe they carry out the evangelising mission of the Church in their role as middle leaders. All five survey items in Part D of the survey (Table 21) had a mean score above 3.81, indicating general agreement with each of the questions. The expression of faith at the leadership level "leading faith" (Figure 5) was the most strongly supported by middle leaders in this study. Evangelisation is worthy of consideration because it is not just a role of the principal but also a significant role played by middle leaders. If leadership in curriculum must be shared, as Hobby (2016) asserts, and the leadership of learning cannot be the sole responsibility of the principal (Renihan et al., 2006), then it stands to reason that the same would apply to the evangelisation responsibility, too. In McEvoy's (2006) study, it was found that religious leaders (principals) need a strong faith because they are surrounded by people who do not place much importance on that faith and they sometimes feel alienated or ridiculed by others. This research does not support this assertion when it comes to the middle leaders who are the subject of this study, given they recognise the ecclesial responsibility they have in Catholic schools and the importance of that responsibility. Hobby (2016) affirms the crucial importance of middle leaders, claiming that middle leaders influence standards more frequently than principals do on a daily basis. Simply put, middle leaders are closer to the action. The most common sources of leadership for teachers and students are their middle leaders. This suggests that the principal cannot successfully fulfil the school's mission to evangelise alone: "even the best principals cannot single-handedly transform a school" (National Staff Development Council,

2000, p. 6). For the purposes of this study, this underscores the importance of the influence that middle leaders, in conjunction with the principal, have on faith leadership and evangelisation in the community.

This influence of middle leaders is of importance as they often operate and are positioned between senior leadership and teaching staff, being members of both groups. Managing the demands and expectations from both above and below is a challenge of the role. The research of Marshall (2012) describes it as "being caught in between or sandwiched between senior management to whom they are accountable ... and subordinates for whom they have some functional and often moral responsibility" (p. 511). This positionality within the school can make the role of middle leader extraordinarily complex as middle leaders "undertake their practices between the principals leadership and the pedagogical practices of the classroom teachers" (Grootenboer et al., 2020, p. 9). Whilst Grootenboer et al. (2020) posit that middle leaders are key change agents and understand and empathise first-hand the context of teaching, they also highlight the concern that there is a dearth of professional learning specifically designed for middle leaders given "they are in the action and everyday practices of the classroom, doing the grounded work of education in practical ways" (p. 10). This tension may well be exacerbated by the additional ecclesial responsibilities expected of middle leaders in Catholic schools which permeate and add to the generic leadership expectations required of middle leaders in all schools.

Interpersonal skills, cooperation, and teamwork (Buchanan et al. 2021) must be recognised as crucial in the role of middle leader since middle leaders operate across many echelons within the school and within various cliques of influence and change. This suggests that collaboration, teamwork, and the creation of strong relationships ought to be at the core of middle leadership rather than merely a feature of it. According to Campbell (1997), "power is a person's ability to influence others, to allocate resources, or to control situations," while "authority is a person's legitimate right to influence others, to allocate resources, or to control

situations" (p.86). French and Raven (1959), in their classic study of power, proposed five forms of power by which a person can be able to influence others: "reward power," "coercive power," "legitimate power," "referent power," and "expert power" (pp. 155–156). The first three were referred to by Daft (2005) as "position power" and the last two as "personal power" (p.480). This perceived need for power to be influenced from above was supported in the qualitative data as one leader stated, *"We've got new leadership, and they're actually listening and responding and I think that people feel that they are listened to and are therefore happy to go with those leaders, and head that way"* (I3).

The results of this study show that the variables of gender, Catholicity, Catholic schooling, and the leadership role held by the middle leader do not have a significant impact on the perception of the middle leader of leading faith in their school community. However, Church attendance was found to be a significant variable for middle leaders' perception of leading faith. Again, the results support the notion discussed in Section 5.2.2.1, that regular Church attendance is an important formative experience. Declining rates of Church attendance and a diminishing connection with parish places increasing pressure on faith leaders in Catholic schools as they are immersed in the contemporary world in which Catholic schools are set, and that middle leaders need to be formed in their own faith themselves so as to actively engage in the faith development of others. The challenge for faith-based schools is to form people in this living faith and the importance of attending mass and connecting with the parish is significant for middle leaders and is confirmed by the qualitative data. One leader stated:

> *It's a personal choice for me to take the family there (Church) most weeks.*
> *Everyone's busy, and I understand that there are the falling rates of*
> *Churchgoers on a regular basis, and I guess that's a bit of a reality in a*
> *secular world. But for my family, we think it's important to try to support the*
> *parish on an ongoing basis, not only for the community aspect, but also for our*
> *personal aspect.* (I1)

The findings of this study found that mass attendance did impact the perceptions of middle leaders on their religious leadership. One leader noted this impact both as an educator and educational leader when contending, *"does it make me a better religious educator? Yes, it does of course. And I think that is important that if we are going to have Catholic leaders in Catholic schools, we need to know what we are on about"* (I6), and *"if I am part of the Catholic system, I would feel inclined to support the extension of the Catholic school, which is obviously the parish"* (I6). These opinions support Coughlan's (2009) assertion that the present paradigm of what it means to be a true "Catholic" – i.e., an active participant in the Church's liturgical life – has changed. Similar to this, middle leaders in a Marist school were able to identify with the Marist charism, according to a study by Elvery (2013, p. 180), regardless of their membership to the Catholic Church (parish) or even their believe in Jesus. While the importance of expressing faith as a leader was emphasised by all participants, there was a perceived lack of connection with the local parish.

The research findings pertaining to diminished participation in Sunday Mass attendance and the perceived impact on the middle leader's religious leadership is well documented in the literature, which explores the extent to which the Catholic community is engaged or disengaged in the parish and the connection between the Catholic school and the local parish. As Weiss (2007) observes, "the traditional parish plant – Church, rectory, convent and school – all conveniently located next to each other on a parcel of land, is a fast-vanishing model" (p. 7). The impact this has on the leadership of Catholic schools is confirmed by the work of Tinsey (1998) who highlights the critical separation within the local Church and the ability of the principal and parish priest to work in partnership. This leads to confusion about the nature of the relationship between the school and the Church (Belmonte et al., 2006). This tension and disconnect between the parish and principals in Catholic schools, seen as outgrowths of the parish (Ferrari & Dosen, 2016), has implications for the faith leadership of middle leaders. Questions arise about the relationship between middle

leaders and the Church, the role the Church plays within the school, and how the Church supports the evangelising purpose and mission of the school to help middle leaders fulfil their ecclesial Church responsibilities.

In the context of this study, for Catholic secondary schools in the Archdiocese of Sydney, it is noted that the majority of secondary schools, unlike their primary counterparts, are not geographically located with the Parish. Given this reality, whilst secondary school students may well be drawn from a number of parishes, each school is linked to a specific parish. Whilst the parish priest is viewed as part of the hierarchical structure of the Catholic primary school this is not the lived reality in Catholic secondary schools. The active involvement of parish priests, as resource persons to support the evangelising role of Catholic secondary schools, would support middle leaders in their role.

The results of this study show that middle leaders recognise the importance of connecting with the parish, but they also indicate that the connection is not as strong as it once was. As one leader stated, *"I think at one point there was that connection between the parish and the schools. I think that has been lost"* (I3). Another leader spoke of the need to communicate the role of the parish to students in such a way that *"they know that we are an extension of the parish and the parish is an extension of the school, so we should not be seen as separate entities"* (I8). The need for a connection to the community was highlighted by one respondent who tried to *"get them to attend some of the Church activities in our local community"* (I3). At the same time, the context in which Catholic schools operate was acknowledged: *"it's quite difficult because you are trying to connect to something that is very old and that the students do not have much of a connection to"* (I5) and *"I really do not see much connection to the parish and I have not found an opportunity to integrate the parish so much"* (I5). The context of the Catholic secondary school is different from that of the primary school. As one of the interviewees stated, *"I think the primary schools are different from what I understand because I think the priests have a little bit more to do with the primary schools.*

But they have nothing to do with the high schools" (I2). The link with the parish, seen as important by middle leaders and essential by Church authorities, is diminishing, leaving religious leaders in Catholic secondary schools with greater ecclesial responsibilities.

One such ecclesial responsibility is leading a range of communal prayer opportunities in the school, which created tension among the middle leaders in this study. This is echoed in the literature of Neidhart and Lamb (2013) who stated, "Principals were apprehensive that future religious leaders may lack the knowledge, skills and attitudes to take on the challenge of religious leadership in Catholic schools" (p. 36), even going so far as to say, "staff are increasingly less confident in leading staff prayer, which was evidenced by their choosing secular orientated reflections over prayers" (p. 36). The importance of prayer was highlighted by one leader as an expression of their faith as a religious leader in their school. This leader spoke of the importance of prayer in the following way: *"as a leader, prayer is important. Prayer nourishes me. Yes, I pray as a leader in the school, but it is actually part of my being. You cannot fake something like that"* (I1). The importance of prayer and the distinction between personal and communal prayer was highlighted by a middle leader who explained, *"there are your personal opportunities and your communal opportunities. So, yes, prayer is absolutely important, especially in a Catholic school"* (I7). The same teacher did not want to overemphasise or exaggerate prayer: "*I like that we start the day with a prayer. It would be nice to end with a prayer as well, but we will see how we go with that one"* (I7).

The results of this study highlight that middle leaders emphasise the importance of relationships in their role. The example of Jesus in all interactions was expressed by one leader as, *"it is the task of the baptised to proclaim the Gospel message in their lives through their actions and words. To be a witness of the Gospel in the modern world and to make a difference"* (LID 84). This suggests that personal faith as expressed through relationships affects all aspects of middle leadership, not just the religious aspect of leadership. In this way, the middle leaders in this study underscore the complexity of exercising faith leadership. At

the same time, middle leaders view relationships as critical to their faith leadership. These findings are consistent with research by Bassett (2016) who asserts that effective leaders form effective relationships, and that managing these relationships is often the most difficult part of middle leaders' work. The power of relationship is also supported by the research of Grootenboer et al. (2020), which demonstrates that when middle leaders talk with one another about their practices they are not only creating a dialogic space that sets up conditions for deepening their understandings, they are also creating a relational space that makes trust possible. The research suggests that relationships and relational trust underpin the important work of middle leaders.

The results suggest that Gospel values influence the leadership of middle leaders. As one leader described it, *"for me it means that with your Gospel values that you're trying to lead those to the best of your ability"* (I3). This was supported by another: *"you're leading by example and putting the Gospel values into practice, not just by your words but also by your actions, and I think essentially, that is what Catholic schools are about"* (I7). This leader went on to say*, "I keep going back to the Gospel values ... I think that has to come from the leaders in your school. And for me, it's working with those Gospel values and actions and words in the school"* (I7). Mellor (2005), who supports the relevance of Gospel values forming faith leadership also believes that the school has a tremendous evangelising influence on families through the promotion of "Gospel values" (p. 305).

This study draws attention to the challenges associated with the evangelising responsibility held by middle leaders and the multidimensional, multilayered role they play. Middle leaders have responsibilities in a variety of different areas, including the faith dimension of the Catholic school. Studies of the demands on leaders in Catholic schools (Cannon, 2004; Elvery, 2013; Lavorato, 2017; Mellor, 2005; Sinclair & Spry, 2005) describe the difficulties faced by leaders in Catholic schools when confronted with demographic changes, dissonance between parish and school, and ongoing social change. This is supported

by Wilkin's (2019) examination of the aspirations of emerging Catholic school leaders who are reluctant to take on leadership roles because of overwhelming administrative tasks and increased role expectations. In a faith-based school context, this is even more important as there are not only increased administrative role expectations, but also those of an ecclesial nature. Other studies have found that Catholic principals and staff are concerned about the number of duties and tasks required as part of the school structure, and that formation for mission is another (optional) excessive expectation (Bracken, 1997; Marden, 2009). This underlines the need for middle leadership formation and ecclesial preparation for faith leadership.

Principals as faith leaders, about whom much research has been done, recommend offering leadership formation opportunities for teachers (and middle leaders) as future school leaders (Neidhart & Lamb, 2013; Thompson, 2010). This study contends that middle leaders are already faith leaders in Catholic secondary schools and that their current formation opportunities need to be considered. As evidenced by the data in this study, it is critical that faith leaders engage in Christian *praxis* while being attentive and intentional about the challenges of the context in which Catholic schools exist. Notwithstanding these challenges, the nature of leadership in a Catholic school draws inspiration from the Gospel.

5.2.3. Summary

The findings consistently indicate that the Catholic school wants to actively contribute to the evangelising mission of the Church and that the ecclesial expectations of the Catholic Church be clearly articulated. However, it is recognised that no single document or collection of documents can fully convey the meaning of the Catholic school's identity, mission, and purpose. The documents reviewed for this study expand on the tradition and culture of the school in its aspiration to be an authentic evangelising agent of the Church and draw attention

to the context and the central role that the Church and Catholic schools play in providing opportunities for the formation of middle leaders to fulfil their ecclesial responsibilities.

The documentary material (as presented in Section 4.2) provided comprehensive and explicit evidence of the Catholic Church's expectations of the role of school leadership in general, and middle leadership in particular, in achieving the purpose of the Catholic school. The findings show that the Church, through key magisterial documents and complementary Sydney Catholic Schools policy documents, has exerted a continuous challenge and pressure to ensure that schools are staffed and led by people who contribute to the evangelising goals of the school. There is also evidence that middle leaders are expected to meet minimum requirements for participation in formation opportunities to maintain accreditation in order to be eligible for retention in their positions of responsibility. This can be problematic if there is a discrepancy between the intentions and expectations of the Church and the understanding and expectation of middle leaders.

While it is impossible to assume that all teachers and leaders are fully committed to the Catholic faith or actively involved in their local parish, the call to evangelisation is addressed to all members of the Church and is a call to live the Gospel in a way that reflects Christ's person and message. Given the diversity of faith viewpoints, an "uncritical awareness of the Catholic school as a faith community can hide a less than ideal reality" (Belmonte et al., 2006, p. 7). If the Church authorities are not attuned to this critical awareness, then Battams' (2002) analogy of the Church becoming a "fringe-dweller" of the Catholic educational enterprise may apply. Fulvio's (2009) research highlights a potential dissonance between the Catholic school and the Catholic Church, as it questions the authenticity of the Catholic school and the educational leadership of the schools, concluding that the Church and educational authorities need to work together to address this situation and respond to the "post-ecclesialism" that can be so common in school settings.

The findings of this study consistently show that middle leaders in Catholic secondary schools are aware of the significant role they play in fulfilling the evangelising mission of the Church. Faith leadership in schools today is predominantly the responsibility of lay leaders, and the need for intentional, ongoing and reflective formation programs is evident (National Catholic Education Commission, 2017; Rymarz, 2002, 2009). Good leadership is a critical factor in schooling, and leadership is not just the prerogative of the principal. Grootenboer et al. (2020) point out that middle leaders have not received much attention in development and research forums. While previous research on faith leadership has focused on principals, it may be said that they play a conventional middle leader role, and so analogies can be established for the sake of this study. Middle leaders work within the school's many echelons and cliques to influence and affect change. While it appears that there is a match between the intentions and expectations of the Church and the understanding and expectations of middle leaders, the development of middle leaders to prepare them for their role as religious leaders has received little attention. This is backed up by Harris et al. (2019), who assert that despite the extensive literature on middle leadership, there is still a significant gap in empirical understanding. Given the role that middle leaders play in schools and the fact that their work is integral to the mission of the Church, further exploration of middle leadership formation is both warranted and overdue.

5.3. Formation for mission for middle leaders

This section responds to Research Sub-Question 3:

RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

The findings of Research Sub-Question 3 revealed that middle leaders in Catholic secondary schools, like all school middle leaders, have leadership responsibilities in the pastoral, social, physical, wellbeing and academic domains. It was noted by Grootenboer

(2020) that there is a current lack of dedicated professional learning opportunities and professional development specifically directed towards leading from the middle in pastoral, social, physical, wellbeing and academic domains and that much of the learning on offer is directed at classroom teaching or administration given that middle leaders also occupy a space within the teaching ranks. However, in addition to these responsibilities, Catholic school middle leaders also exercise an evangelising role, which transcends all other responsibilities and permeates all aspects of the school. This study identifies a gap in the provision of religious formation for mission opportunities to support middle leaders in executing this additional leadership responsibility whilst at the same time acknowledging the potential transferability of skills needed to lead pastorally, administratively and academically. This is supported by Grootenboer et al. (2020) who consider the competencies of middle leadership as teaching, student learning, professional learning, leading and administration, and researching and evaluation (p. 9). Middle leaders are consistent in their beliefs about their evangelising role and the need for their religious formation at the personal, educational and leadership levels. Middle leaders realise that religious formation is where their soul and their role converge, yet there are limited religious formation opportunities specifically directed at the role of middle leader. In addition, middle leaders recognise the need for purposeful, relevant and engaging formation for mission experiences to carry out their evangelising responsibilities. The personal formation experience of middle school leaders is critical to fulfilling ecclesial responsibilities and expectations as they project the state of their souls to their students. There is a need for middle leaders to engage in formation experiences for themselves – as teachers and as leaders – in order to support their preparation (formation for mission) for their ongoing evangelising role. This is supported in the literature by Buchanan et al. (2021), who suggest that middle leaders' professional learning must be tightly matched to the specific demands of their role.

The analysis of policy documents, quantitative and qualitative data from the survey, and qualitative data from semi-structured individual interviews serve as the foundation for this discussion of the findings. The Church has made it clear that faith, like a seed newly planted in the soil of the human heart, needs water and light (Catholic Bishops of New South Wales and the Australian Capital Territory, 2007). If Catholic schools are to succeed in passing on the Catholic faith to future generations, they must strive to develop Christian disciples with the right worldview, character and behaviour. As a result, developing our Catholic school leaders (including middle leaders) and teachers is crucial to achieving these goals. In order for the true self and the community to flourish, formation involves bringing the soul and the role together in a life-giving synergy (Palmer, 2004).

The data in this study indicated to the researcher that while the middle leaders were aware of the types of formation opportunities available to them, and were positive about the role of religious formation, they may have been unsure of the importance of religious formation in assisting them in their evangelising roles. At the same time, middle leaders indicated that religious formation helped them in their leadership and believed that religious formation is relevant to their leadership. This is confirmed in the literature by several researchers and authors who see ongoing formation as vitally important for sustaining, nurturing and renewing the vocation of teachers (Cho, 2012, Groome, 1998; McMahon, 2003; Palmer, 1998; Simone, 2004, Sultmann et al., 2022). Adequate formation is thus critical for future leadership in Catholic schools given the context in which they exist. Personal characteristics such as Church attendance, leadership role, Catholicity and Catholic school education also influenced middle leaders' understanding of the nature and overall adequacy of religious formation opportunities offered to them. For the purposes of this study, middle leaders perceived their experience of formation from an individual (self), educational (teacher) and leadership (leader) perspective.

5.3.1. Policies, programs and features

Formation for leadership (4.4.3) presented the data on the formation policies that apply, and formation programs offered to middle leaders in Sydney Catholic schools. The need to strengthen faith formation and religious leadership opportunities for staff to deepen their faith life is identified as a policy in *New Horizons Inspiring Spirits and Minds* (Sydney Catholic Schools, 2017) strategic plan. The plan emphasises the importance of lay staff and reaffirms the Church's commitment to support faith formation for all staff. The document is closely aligned with the *Accreditation Policy to Work, Teach and Lead in Sydney Catholic Schools* (Sydney Catholic Schools, 2011). This Archdiocesan policy is the only document that specifically names middle leaders as opposed to leaders in general. The accreditation policy aims to support the school's mission to engage all staff in the Catholic life of the school, promote professional and academic formation, ensuring that leaders in Catholic schools have the necessary academic knowledge and abilities for leading a religious community. Sydney Catholic schools strive to promote formation for mission, faith development and ongoing professional growth of all staff members, as well as to recognise that many staff members bring a range of gifts and depth of Catholic faith and knowledge to their school community that far exceeds the minimum requirements of an accreditation structure. It requires that all staff participate in one professional development day per year that addresses faith formation. This approach is supported in the literature as the importance for the need for ongoing faith formation for lay educators has been identified (Buchanan et al., 2021; Cho, 2012).

The data indicate that there are limited formation opportunities for middle leaders and that there is no evidence that a "one size fits all" approach is appropriate. In fact, specific formation for middle leaders is mentioned in only one section of the *Religious Education and Faith Formation Calendar* (Sydney Catholic Schools, 2018). There are programs tailored to those in their first through tenth year of teaching, those in higher leadership positions (such as

principals and assistant principals) and those seeking higher religious leadership positions. The findings also suggest that other formation opportunities exist for those in religious positions of responsibility, but there are no distinctions made between the type of leadership role in which the middle leader is engaged. This gap in formation opportunities aimed and specifically directed towards middle leaders demonstrates a short-sighted approach by Catholic educational authorities to the religious formation of those who will be appointed to higher senior leadership positions in the coming years. This gap is highlighted in the literature where Gallagher (2007) alludes to the difficulty for aspiring leaders to express the faith dimension of leadership and the need for Catholic schools to help and encourage teachers who aspire to leadership posts within the unique ethos of Catholic schools.

Religious leadership is highlighted as a priority in the *Religious Education and Faith Formation Calendar* (Sydney Catholic Schools, 2018). Engagement in such faith formation opportunities was expected by all middle leaders with a need to complete a minimum of 45 hours of formation over a five-year period in order to obtain and maintain their accreditation under the *Accreditation Policy to Work, Teach and Lead in Sydney Catholic Schools* (Sydney Catholic schools, 2011). Category C is of particular interest to this study, as it addresses formation at the personal, educational and leadership level for middle leaders. It consists of participation in staff faith formation days, professional development, and/or formal higher education studies in recognised areas, including Catholic Education Office approved training and immersion programs. However, these national and international pilgrimages and immersion experiences are geared toward those in senior leadership positions rather than those who are predominantly in middle leadership positions. In addition to these opportunities, there are a number of professional learning days on mission and identity for those in religious education leadership positions (Religious Education Coordinator and Youth Ministry coordinators). The calendar also includes formation opportunities for aspiring and emerging religious leaders. Catholic education's dynamic environment calls for the ongoing

identification and training of future leaders of high calibre who are equipped to tackle a wide range of issues (Sydney Catholic Schools, 2017). While the programs identified a myriad of formation opportunities, they were not specifically aimed at supporting middle leaders to carry out their evangelising role.

5.3.2. Middle leader formation for mission experiences

Middle leaders perceived their experience of formation from an individual (self), educational (teacher) and leader perspective.

5.3.2.1. Formation for mission experiences for Self

The findings of this study indicate that there was moderate agreement among middle leaders' beliefs about the role of religious formation at the personal level. All three items in Part E (Section 1) of the survey (Table 24) had mean scores ranging from 3.59 to 3.67, indicating general agreement with each of the questions. Mass attendance, as discussed in 5.2.2.1, affected middle leaders' beliefs about formation at the personal level. One leader noted that changes in their family situation affected their Church attendance, stating "*Church attendance, probably over the last three years has increased. More so as I have a young family, so it has become more important to me again. My beliefs have not changed, but I think now that as I have matured and have different look at life and, I suppose, it is becoming more of a priority for me again*" (I6). The same leader saw Church attendance as having very little impact on their religious formation stating "*even when I started teaching and did not go to Church, it had very little significance to me. Nothing has changed because I am going to Church more, I have a greater connection to the Church. It's who I am. It's what I've always been taught to be. Does that make sense?*" (I6). Another leader suggested that their connection to the Catholic school as a faith community negated their need to attend mass: "*I, in fact, stopped attending Church for a while, but certainly found that my connection through*

the Catholic schools that I've been a part of has fulfilled the void of that attendance" (I1).

Another similarly stated, "*I suppose I don't go to Church as much as I used to go. However, I do go to Church at school every Wednesday morning and I try and make that a regular occurrence"* (I3). However, this same leader acknowledges the importance of mass attendance as a leader in Catholic schools by stating, "*I think it's an important dialogue, particularly because there seems to be a dislocation between the family and the Church, the local parish Church. So, I think it's important, as a leader, that we have discussions around why and why not they attend Mass"* (I3). The literature indicates a "movement away from ritual and Church attendance, yet openness to belief and a sense of God when seen from a psychological and personal level" (Gowdie, 2011, p. 299). With 31 per cent of the respondents in this study not attending mass regularly, but 94 per cent of the respondents strongly supporting Catholic values as expressed in "informed renewal of personal faith" the research findings support the idea that one's own personal sense of faith, however articulated, serves as the foundation for engaging in religious formation. This finding is confirmed by Bracken (2004), who discovered that people are open to seeking and are at different stages of their spiritual journey.

This individual sense of faith and the personal nature of formation was confirmed by the qualitative results of the survey, in which one leader viewed religious formation as "*an individual understanding of my own faith journey, my religious growth, and personal relationship with God within a structured organisation such as a school"* (LID106). This view was supported by others who viewed formation as: "*to develop understanding of the faith as well as personal faith"* (LID 28), "*an individual's openness to Christ in their lives and how that directs our decisions"* (LID 66), and "*building a personal faith guided by the teachings of the Catholic Church*" (LID 15). These qualitative survey results indicated middle leaders' positive orientation toward the concept of religious formation and that such formation is seen as "*the development of Catholic values within an individual over time"* (LID 132). The

results of this study confirmed that middle leaders were very open to engaging in religious formation.

The data findings indicate that religious formation for mission needs to be seen as both purposeful, relevant and related to its claimed purpose. One leader noted the need for relevance and purposefulness of the formation, and that some formation experiences are not related to their claimed purpose by saying, "*spirituality days are nice. I'm not exactly sure how they relate to religious formation. The yoga session and the coastal walk were lovely and opportunities to reconnect with the world, but not really religious in a traditional sense*" (I5). Another leader suggested that "*it depends on if you are talked at the whole time and whether the speakers come across too preachy. If they come down as forced it turns people off*" (I7). This theory is supported by the research, which notes that the two main barriers to participation in formation opportunities are a lack of time and a lack of a sense of perceived relevance (Crotty, 2003). The need for relevance and meaning is even greater considering the findings of Bracken (2004), which indicate a general reluctance of staff to participate in offered retreats and formation programs regardless of content.

While the subjects in this study viewed religious formation in a personal way, there was strong support for it being personal to all members of the school community, including staff and students. This underscores the communal nature of the formation for mission experience. One leader expressed religious formation in Catholic schools as "*developing religious faith in people of all ages*" (LID 43), and another as "*bringing the faith to all by ensuring that all have a formed conscience and that all actions reflect the actions of Christ*" (LID 54). This personal and communal nature of formation for mission is affirmed in the literature by Sultmann and Brown (2014), who point out that formation entails processes of individual and collective reflection that rely on tradition, taking into account the signs of the times, and encourage faith as an integral part of daily life for the individual and the community. One participant summarised the holistic and communal nature of religious

formation by saying, "*religious formation is our response to God's call to Christian living. Formation is not just about the individual, but also about the shared journey of the community. Religious* formation *encompasses everything that educates or informs us in our faith*" (LID 47).

The qualitative data of this study indicates that participants believe that religious formation has to do with deepening personal knowledge of faith, which is confirmed by Sultmann and Brown (2014) who suggest that the cultivation of faith is part of the daily life of the person and community. The Catholic Church's highest echelons encourage lay ministry and leadership as a sign that the theological and canonical dimensions of the laity's ministry within the Church have been deepened (John Paul II, 1994). For this reason, formation must take place in the context of the life and work of middle leaders. This expansion of one's theological and canonical understanding is both communal and personal, going beyond the original epiphany of recruitment (Mahan, 2002) that moves individuals initially to teach.

It is the formation of a personal identity that is informed by the values and teachings of the Catholic Church. This was seen by one leader as critical in their role: "*as a teacher in a Catholic school, our responsibility is to be aware of the need to assist in this formation*" (LID 13). A specific example of the importance of understanding Catholic culture and potential shortcomings in theological and canonical understanding was cited by one leader, who saw the need for religious formation as "*exposing people to experiences in the Catholic tradition as a way of deepening their faith experiences of liturgy, prayer, scripture, catechesis, service and others*" (LID 100). This perceived lack of theological understanding to underpin the formation of middle leaders is cited in the literature by Belmonte et al., (2006) as a failure to support their ongoing religious growth, and as such provides a significant challenge. In particular, middle leaders expressed a need for continued personal growth in their faith and needed further experiences. As one leader expressed it, "*I guess even for us as adults we're all on a journey. I don't think there's ever really an end point where you're religiously*

formed" (I8). Another expressed continuing formation in the following way: *"I understand that it is a fluid, organic thing that grows and develops"* (I4). These findings are supported by the research of Gowdie (2011), which found that the "current dissonance between members of Catholic school communities and the Church results in a lack of connection and meaning of traditional symbols, concepts, rituals, and other expressions of Catholic culture" (p. 315). These findings are consistent with other Australian research (Dorman & D'Arbon, 2003; Duignan, 2004; Duignan & Riley, 2008) and suggest that education and theological understanding are critical, particularly in the Catholic context.

This importance of prayer as a symbol, ritual and expression in personal religious formation was emphasised in this study by the middle leaders. John Paul II's main message to the Church in Oceania (2001) was to put out into the depths while doing so in a way that connects evangelisation with prayer (McGrath, 2014). Prayer nourishes our connection and relationship with Christ. It is in the absolute solitude of prayer that we are more connected. This was expressed by Moore (2008) as:

> we need to lose that particular, limiting self-consciousness and promote simple and ordinary contemplation ... The capacity in each of us to find the stillness in ourselves and in life that is the most productive place of all. The paradox is that we are most connected and most creative while living in that special kind of solitude. (p. 11)

Middle leaders spoke about the importance of prayer and reflection as a means of deepening and finding meaning in the events of their lives. This was confirmed by the literature, which discovered that prayer and thought suggest and foster a relationship with the Divine, one that not only seeks an encounter with the sacred through contemplative dialogue but also centres prayer. The importance of prayer as a means of faith is underscored by this relationship with the Divine, which serves as a vital link between spiritual paths (Sultmann & Brown, 2014). One leader described the personal importance of prayer as *"absolutely important, especially in a Catholic school. I like how we start off with prayer at the beginning*

of the day and it would be nice to end with prayer, as well" (I7). This perception of prayer is supported by the research of Conti (2002) on the spiritual lives of teachers, who emphasised the importance of silence and prayerful contemplation. He saw that the teachers included in his research project placed a high value on encouraging prayer and a sense of community. Conti (2002) claims "this is the core of their spirituality" (p.203) and notes that "the key to connection seems to be silence" (p.203), which can be found through prayer. According to Hehir (2010), prayer is a covenantal connection with God in mission, a basis for witness, and a means of combining formal and informal Church experiences and celebrations with sacramental consciousness practises. The opportunity to deepen faith through formation experiences such as prayer provides the opportunity to further engage in the evangelising mission of the Church. One middle leader summed this up by saying, *"my understanding is the deepening of Gospel values leading to a better informed knowledge of scripture and the place of God in one's life. One is also then better able to spread the teachings and love of Christ to fellowmen"* (LID 85).

The connection between personal formation and the evangelising role of the middle leader is difficult to make, especially in the contemporary context of a busy and fast-paced Catholic secondary school. The literature emphasises that despite the potency of the experience, even the greatest intentions of individual staff members are quickly lost in the speed and tempo of the daily school routine and the responsibilities following formation experiences (Groen, 2001; Lipscombe et al., 2021; O'Brien, 2005). Formation, like all professional learning, takes time. One of the main concerns expressed by participants regarding religious formation was the issue of time. One leader pointed out that people are so busy in school and in life that *people just won't find time to develop their faith"* (I8). This leader continued: "*... I think it is valuable for staff to get away from their daily activities and have time and silence to really reflect on their faith and spirituality"* (I8). The importance of time was underscored by comments such as, *"I actually have the time to step back and reflect*

in that setting on what is really good" (I6). This was echoed by another participant who said, *"I just think it's good to reflect on the past days, to reflect on the stories and experiences that the speakers tell, and to have time to think about it and discuss those stories. I think that makes all the difference"* (I2). The literature highlights the idea of a time-poor culture (McMahon, 2003), within which many schools operate.

All of the middle leaders participating in this study were classroom teachers. Many middle leaders typically have a range of responsibilities within their portfolio, including teaching responsibilities. In addition, many had responsibilities outside of school, including those with their families, which places an emphasis on the critical nature of time. This notion of time is supported by Grootenboer et al. (2020) who found that if anything was going to confound educational development in schools then it will often be time or lack thereof. Schools are busy places with curriculum innovations, wellbeing agendas, professional learning plans, compliance checks, personalised plans, intervention programs and a myriad of other agendas. While research on the demands placed on principals in modern Catholic schools, particularly time demands, have been conducted (Cannon, 2004; Mellor, 2005; Sinclair & Spry, 2005), one potential area for further research are the similar demands that exist for middle leaders in Catholic secondary schools.

Middle leadership respondents spoke of the importance of "doing" formation and *"actively engaging in faith"* (LID 9), *"having the opportunity to actively engage in experiences that highlight and reinforce Gospel values and practices"* (LID 96), and *"participating in a range of activities or experiences that develop an understanding of the central role of Christ in our lives"* (LID 120). This "doing" of formation also means leading by example: *"faith leaders lead by example, both clergy and laity"* (LID 42). Such experiences can be negated when, as one leader recounted *"I don't mind being taken out of my comfort zone but being asked to stand up, link arms and chant damaged the experience"* (I1). This active participation in formation leads to what Grace (2010) has called spiritual capital,

which is essential for those who work in Catholic secondary schools. Those in education whose formation involves the "acquisition of spiritual capital are not simply acting as professionals, but as professionals and witnesses" (p. 119). When one is actively involved in formation for mission, soul and role are woven together in a way that both the true self and the community can thrive (Palmer, 2004).

Thus, the findings of this study confirm that the personal formation experience of middle leaders is critical. This is supported in the literature by Shield (2008), who holds that a Catholic approach to formation and professional learning should be interactive, respectful of expertise, and provide a clear sense of direction. The notion that the novice stands alongside the expert and learns skills through observation, imitation, change and repetition is gone (Beckett, 2009), now seen as passé. Formation needs to be much more engaging and relational. Formation informed by the vision of the school as a faith community will foster the connection between school, family, and community that is necessary for evangelisation. This was emphasised by respondents who said, "*opportunities to incorporate and participate in one's faith life through the liturgical and prayer life of the school / parish / community are essential*" (LID 102) and are necessary to "*strengthen relationships between the school, families, and parish spiritually, socially, and educationally*" (LID 8). Formation offers individuals a credible opportunity to process meaning, form identity, make connections, and develop a spirituality. As one leader put it as:

> *religious formation is our response to God's call to Christian life. It can most definitely be one's journey towards a religious vocation or our formation as a member of our Church community. Formation is not simply about the individual but also about the community's journey together. Religious formation includes anything that educates or informs us in our faith.* (LID 47)

The findings confirm the need for a formation approach that is situated in a vocational and personal context. Formation provides the experiences from which staff grow in faith life and leads one toward the kingdom of God in secular, pluralised and individualised work.

Chapter 5: Discussion of Results

Personal renewal starts with paying attention to one's inner self and giving one's own personal testimony to Gospel values. This involves a "radical conversion, a profound change of mind and heart" (Pope Paul Vl, 1975, n. 10). Formation experiences should allow professional and personal witness to merge. In turn, formation for self is necessary before formation as teacher and leader can take place. It leads to a school community that is truly Catholic in nature and in harmony with the evangelising mission of the Church.

5.3.2.2. Formation for mission experiences for middle leaders as teachers

The results of this study indicate that there was a high level of agreement among middle leaders' beliefs about the role and commitment of religious formation experiences from a teaching perspective. All six items in Part E (Section 2) of the survey (Table 26) had mean scores ranging from 2.68 to 3.99, indicating general agreement with each of the questions. The results of this study support the need for formation experiences in the daily work and teaching of middle leaders. This was evident in the voice of one middle leader who said, "*it's your own personal development. There are times where life experiences may question your faith, but I think the professional development gave us an opportunity to reignite questions, doubts, and really affirm our spirituality*" (I2). This is supported in the literature by Downey's (2006) study, which relates the cultivation of spirituality to the experiences of teachers' daily work. The findings suggest that teachers' faith and spirituality are nurtured through the experience of community, particularly through connections with colleagues, students and their families. Downey (2006) also found that teachers' own spirituality and comprehension of their faith are influenced by witnessing the development of their students. The results of Hughes' (2008) study were consistent with the fact that participants found meaning in engaging in formation that aligned with their daily work and life experiences.

While the results of this study confirm the support middle leaders have for religious formation, it is also obvious that good teaching cannot be reduced to method, but rather stems

from the teacher's identity and integrity. One of the middle leader respondents spoke of formation opportunities as a way to "*nourish your own soul and [enable] you to come back with more enthusiasm and more stories to bring back to students which will support evangelisation*" (I1). The formation for mission of middle leaders as teachers in Catholic schools "is essential because teaching is a calling that requires constant renewal of mind, heart and spirit" (Jackson & Jackson, 2002, p. 285). Palmer (2004) notes that teachers' faith lives are too rarely taken seriously as a topic of professional development. Formation is important because when teachers teach, they project their state of mind onto their students, their subject and their way of being together (Palmer, 1998). This view is supported by Chittester (2003), who says, "what you are, your students will be" (p. 9). This is further supported in the literature by Hunt (2005) who believes that formation is especially important when lay personnel are not Catholic or, if Catholic, have not had the opportunity to understand the religious mission of the Catholic educational heritage. It could be argued that the importance of formation is even greater when one considers that teachers are called to teach rather than nurture a pre-existing faith, and that they therefore play a central role in the effective mission of the Catholic school. This is important in light of Bracken's (2004) research highlighting the influence of teacher co-leadership in shaping and reshaping the culture. Providing a program of formation to support teachers is necessary.

The findings indicate that, overall, middle leaders believe that religious formation is part of professional learning: "*formation is part of professional learning and it is like spiritual nourishment, but I think that why it is an important part of professional learning as it sort of normalises it and highlights its importance in our role*" (I2), and that it is most effective when placed in the context of participants' everyday reality. However, there a minority of voices did not see formation as part of professional learning, as expressed by one middle leader: "*if it is part of professional development and staff have been forced into it, then I do not think it is authentic. I feel like it would not be as successful as it could be if it was done*

just for professional development or to check a box" (I8). Another leader suggested that it was not part of professional learning but rather "to tick a box rather than genuinely trying to up-skill" (I4). According to the literature, adult education is most effective when it is related to the learner's professional or workplace environment (Hough, 2004; Kilpatrick et al., 2003; Sparks, 2003). The concepts of professional learning, which include an inclusive group of people driven by a common learning vision; supporting and cooperating with one another, and reviewing and reflecting on their beliefs, methods, structures, and practises, are thus, applicable to formation (Preedy et al., 2003). Respondents in this study see that religious formation helps them grow professionally, is critical to their role, is critical to what is taught in the classroom, is part of their professional learning, and is necessary to teach in a Catholic school.

The findings also confirm the understanding that formation should be ongoing to nurture and "support lay teachers and leaders in Catholic schools because, as scripture, asserts, vocation is not static" (Pope Paul VI, 1965, para. 29). Similarly, when speaking about formation, the middle leaders who participated in the research conducted in this thesis said that middle leaders *"should do more"* (I1), that *"it is an ongoing process"* (I8), and that it is *"ongoing all the time"* (I4). Groome (2002) recognised that these experiences lead lay teachers to "self-transcendence or continual maturation toward new horizons" (p. xix). Mahan (2002) states that these experiences were the result of the congruence between our "deepest desires and hopes and our unique gifts" (p. 11).

Every middle leader who was part of the sample for this study also had teaching responsibilities within the Catholic school. As discussed in (5.2.2), the multidimensional role and the myriad of expectations placed on middle leaders comes with a tremendous burden. The constant busy-ness reduces the opportunity for reflection, to maintain and nurture one's integrity and identity. Palmer (2002) found that this busy-ness does not allow the teacher time to nurture an inner life. As found in the literature, burnout comes from an over-abundance of

busy-ness (Graziano, 2005; Jackson & Jackson, 2002) which destroys the soul (Koester, 2002). The literature also shows (Intrator & Scribner, 2000; McMahon, 2003) that formation experiences that nurture and support teachers and encourage reflection, alleviate aspects of burnout for teachers. This affirms the importance of formation of lay middle leaders as teachers in Catholic schools, and that it is essential (Congregation for Catholic Education, 1982, n. 62, 65, 78 & 79; Pope Paul VI, 1965, n. 28).

5.3.2.3. Formation for mission experiences for middle leadership

It is clear from the documents that school leaders are expected to engage in formation processes because "the more we are formed, the more we feel the need to pursue and deepen our formation; just as the more we are formed, the more we become capable of forming others" (Pope John Paul II, 1989, p. 169). The role, mission and purpose of the Catholic school is supported through religious formation and incorporates the broader community as part of the Church. Consequently, the Catholic Church has very clear, well-defined expectations for staff in Catholic schools, as Catholic schools are to educate in the Catholic faith. Research (Chittester, 2003; Grootenboer et al., 2014; Grootenboer et al., 2020; Lipscombe et al., 2021; Starratt, 2004) has found that the effective creation and promotion of culture within a school community depends on the leaders' informal and official roles. In this way religious formation is fundamental for leaders, given the role of the Catholic school as a place that provides a sense of connection to Church, and that students, staff and parents, now make up a post-ecclesial community (Rolheiser, 2008). In this context, it is clear how important it is for leaders in general and middle leaders specifically to engage in formation experiences.

The results of this study indicate that there is a moderate level of agreement among the middle leaders' beliefs about the role of and engagement in formation experiences. The six items in Part E (Section 3) of the survey (Table 28) have mean scores ranging from 3.36 to

3.93, indicating general agreement with each of the questions. These results indicate that middle leaders understand the type of formation experiences available to them from a leadership perspective. However, the data also indicates to the researcher that the sample may have been uncertain about the importance of religious formation for leadership. Overall, middle leaders were positive about the role of religious formation and about having a formation focus in their schools. Respondents agreed that participation in formation experiences is generally strongly supported from a school leadership perspective. Middle leaders indicated that religious formation helps them in their leadership work and that religious formation is relevant to them. These findings are consistent with literature indicating that leadership formation programs aim to develop leadership skills and improve self-confidence and self-perceptions of leadership (Fincham, 2010; Flintham, 2007; Gallagher, 2007; Shields, 2018; Wallace, 2000). Cress et al. (2001) found in a study of university students that those who had participated in leadership programs reported much greater self-concept as well as the ability to set goals, clarify their values and take risks, than non-participants. This is also consistent with Pheko's (2008) study, which compared the perceptions of participants in a leadership formation program on their leadership roles with those of non-participants, and concluded that those who had not participated in the program had lower self-esteem in leadership positions, while participants developed more confidence in their leadership abilities. For middle leaders, the experience of formation in their role may help them realise their own potential to take on other leadership roles in Catholic education.

The data revealed that middle leaders who were the subjects of this study were unclear about the purpose of religious formation for their leadership roles. When asked "what do you understand by the term *religious formation*?", 68 per cent of the participants did not believe that religious formation had anything to do with leadership. The data (Table 29) suggest that they saw it in the context of their personal and educational development. One leader described it as "*the formation of a personal identity informed by the values and teachings of the*

Catholic Church" (LID 4). Similarly, others said *"deepening a person's understanding of the Catholic faith through retreats, discussions, and research* (LID 21) and *the individual journey one takes in gaining one's own religious identity through various connections with Christ"* (LID 26). This is supported in the literature, which finds that effective leadership (Bezzina et al., 2007) involves more than just experience and competence, but is based on who the leader is rather than how they apply leadership concepts or styles (Starratt, 2004). Participation and engagement in formation experiences should not be considered optional for middle leaders, even to maintain accreditation (Ranson, 2006). The results of this study indicate that middle leader respondents neither fully agreed nor disagreed with the statement "I participate in formation opportunities only to maintain accreditation". This item had a mean of 2.68 and a standard deviation of 1.160, indicating a higher degree of variance among responses. For engagement to be meaningful and purposeful, it must be both relevant and inviting.

The data indicate that middle leaders support formation for mission for leadership, and do not see formation as only a means to maintain accreditation. This was the item that received the least support and had the largest semi-interquartile range. Of note, 28 per cent of respondents agreed with this statement regarding accreditation, which raises the question of why they engage in such formation. This could be related to the relevance with which the middle leaders perceived their formation experiences. This finding is supported by Gowdie (2011), who found that the "structure of leadership training pathways in general and a mentality of paper chasing and a culture of checking boxes" (p. 345) have raised concern among teachers and leaders. One of the most persistent concerns with all formation experiences is that they become nothing more than programs that one must complete.

The middle leaders in this study support the notion that religious formation experiences must be relevant to support their leadership roles. This belief that leadership requires formation beyond classroom and administrative expectations is reflected in Ranson (2006), who argues that administrative skills in education are not sufficient to invite

individuals to imagine themselves with broader opportunities in leadership" (p. 421). For middle leaders to take on more senior leadership roles with Catholic schools, Ranson (2006) would argue that "individuals must be found who not only have administrative skills, but are also rooted in faith and have spiritual maturity, a sensitivity to vocation, and an awareness of ecclesial responsibility" (p. 421).

This study recognises the need for religious formation to assist middle leaders in Catholic secondary schools in their leadership. This is supported in the literature by Duignan (2006) who argues that the religious formation of leaders in Catholic schools should account for sociocultural changes and that "authentic educational leaders have the awesome responsibility of influencing the young people in their care to become significant and worthwhile human beings" (p. 147). Duignan (2006) thinks leadership development programmes should assist leaders to "open their eyes to the possibilities in themselves and in others and the development of their capability to frame new paradigms of leadership based on new orientations to relationships and presence in order to respond to … challenges and tensions" (p.147). This identified need for religious formation to support the leadership of middle leaders is also supported by Ranson (2006), who states that such "persons obviously don't come ready packaged" (p.421). Individuals identified with potential require ongoing education and formation. As Ranson (2006) suggests "both focused theological and spiritual formation are needed" (p. 421).

While traditional patterns of formation no longer apply (see 2.6.2), the data in this study reveals that the range of relevant and inviting religious formation experiences is inconsistent, with only one formation opportunity explicitly targeting middle leaders (Table 30). Hughes (2008) emphasises that "dialogue about interests and preferences is important" (p.40). Grace (2000) identifies the difficulties of lay leaders within traditional formation models when he states, "in a society increasingly marked by secularism, consumerism, and market forces, the need for strong spiritual leadership in Catholic schools is very clear. But it

is a daunting challenge" (p. 16). Grace (2000) goes on to explain that it is one thing to give a personal testimony of faith, but to provide inspiration to others spiritually is quite another. Middle leaders, while understanding the need for religious formation, are not as confident of leading in this area. This is supported in the literature by Burley (2001), who claims that conventional monastic and religious life models for Catholic development are unsuitable for today's lifestyles and demography of individuals in various Church ministries (including middle leaders in Catholic secondary schools for the purposes of this study). To some degree, this is at odds with Flintham (2007) who found that principals, when questioned on the foundations of their faith upon which their school leadership was based, summarised their responses with two words: inclusion and invitation. This is also highlighted by Wallace (2000), who discovered that principals had a strong sense of self-belief regarding their position as religious leaders. Although these studies did not specifically address middle leaders, the parallels can be drawn.

The middle leaders in this study indicated that they need to continually engage in formation for mission experiences. One leader said, "*it's an ongoing process, I don't think it's ever stagnant. It's always changing, it's dynamic*" (I8). This is supported by Gowdie (2011) who advocates burying the term *professional development* in favour of creating a culture and language of lifelong learning. Religious formation allows leaders to deepen their connection with Christ and respond to the formation of others. John Paul II's remarks from 1986, in which he presented teachers and leaders as collaborators motivated by religion at the centre of Christian society rather than merely teachers, served to bolster this.

As has been stated, there is little research in the literature on the formation for mission of middle leaders. Following the research on principals, the busy-ness of leadership in general is acknowledged by Fullan (1991), who reports on research showing that leaders' workdays are "sporadic, while characterised by brevity, variety and fragmentation" (p. 146). Fullan (1991) goes on to talk about leaders engaging themselves in the most current and pressing

situations and investing little time in reflective planning. One middle leader stressed this tension:

> *... and having that opportunity for myself, just a bit of quiet time to think and pray and reflect. Some of my best decisions are made on those Friday mornings, when I actually have the time to just have my own moment and to think about it within that kind of context, which is really good.* (I6)

Another middle leader expressed this as: *"it opens up the opportunity to look at the formation of leaders generally, and whether people are formed as leaders and then given roles or are they given roles for some other reason and then formed? I think sometimes we get the relationship backwards"* (I5). Collectively they represented the need for formation and the time needed for middle leaders to engage in religious formation experiences.

The findings of this study support the need for middle leaders, as potentially emerging senior leaders in Catholic secondary schools, to engage in religious formation experiences. This need is supported in the literature by Grace's (2000) assertion that, while "experienced principals draw on their resources of spiritual capital in discerning the way forward and in giving leadership on educational policies and practices of their schools, this spiritual capital is also a declining asset" (p. 237). Thompson (2010) goes so far as to suggest that formal formation programs for aspiring school leaders are urgently needed. This notion is also supported by the research of McEvoy (2006) who states, "most principals interviewed, felt that preparation for the religious dimension of their leadership had been at best, haphazard" (p. 236). Indeed, not only is formation for mission preparation lacking but also for preparation for leadership more generally. Bassett (2016) and Bassett and Shaw (2017) looked at middle leadership development generally in New Zealand and discovered that most middle leaders benefited from some type of leadership development, although many felt underprepared and learnt through trial and error rather than formally structured leadership development. An ongoing commitment to relevant and purposeful formation for mission experiences for middle

leaders for themselves, as teachers, and as a middle leader will support their preparation (formation) to fulfill their evangelising roles.

5.3.3. The adequacy of religious formation for middle leaders: strengths and gaps

This section responds to the Research Sub-Question 4:

RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

The findings of Research Sub-Question 4 identified gaps in the adequacy of the formation experiences offered to the middle leaders. One such gap was identified between the Church's understanding of the ecclesial responsibilities of middle leaders and what middle leaders saw as their evangelising role. There is a division noted between the Church and society, and the resulting gap between the Catholic school and the parish. Middle leaders in Catholic secondary schools are aware of their evangelising role in continuing the mission of the Church and, to that end, require an intentional, relevant and ongoing program of formation. The findings indicated that middle leaders play a significant role in Catholic education today, and require a need for adequate religious formation opportunities.

The policy document analysis, the quantitative and qualitative data from the survey, and the qualitative data from the semi-structured one-to-one interviews with middle leaders serve as the foundation for this discussion of the findings. The results of this study found that middle leaders moderately agreed that Catholic educational authorities provide adequate opportunities for religious leadership formation, and these findings were confirmed by the one-to-one interviews. There were mixed results when mentioning positive or negative formation experiences, and participants' responses varied widely, raising questions about the overall adequacy of formation programs offered to middle leaders to assist them in carrying out their evangelising role and furthering the goals of the Church. The findings revealed both

strengths and weaknesses in current policies and programs and confirmed inconsistencies in the adequacy of formation offered to middle leaders in Catholic secondary schools.

The results of this study indicate that middle leaders understand the ecclesial identity of Catholic schools and appreciate that the Catholic school forms part of the evangelising mission of the Church. Middle leaders also understand the evangelising role they play in Catholic secondary schools, which is supported in the literature by Rymarz (2010), who specifically states that the identity of Catholic schools is essentially derived from the people involved with it, and that Catholic identity is dependent on a large number of people who provide actual testimony to the Church's beliefs. For this reason, the role of middle leaders, about which little research has been conducted, is of paramount importance. Given the important purpose and mission of the Catholic school and the pivotal role and responsibility of middle leaders in Catholic education, the consequent need for adequate formation becomes even more apparent.

5.3.3.1. The necessity for adequate formation experiences

Providing proper formation experiences is a major difficulty, and Australian dioceses have explored a variety of options (Hughes, 2008). The Catholic Church places a strong focus on formation as a means of assisting families and as a motivating factor for the grateful acceptance of the laity into their apostolate or mission (Pope Paul VI, 1965). Lay teachers and leaders are especially effective in the Church's mission to the world precisely because they are involved and immersed in the many aspects of life (Pope John Paul II, 1994). The adequacy of formation experiences, then, seems to depend on how well those experiences reach middle leaders where they are in order to meet their needs. This notion is supported in the literature by Groome (2002), who said that "formation should be lived in the market place of life" (p. 284). Hence, there is a need to provide adequate formation for lay middle leaders in Catholic secondary schools with consideration of the various dimensions of middle leadership

including a myriad of other responsibilities, such as being parents and spouses, that will encourage and support their religious leadership roles in Catholic schools. This will affect the identity of middle leaders and the mission in which they serve.

The middle leaders who participated in the research for this thesis recognise the mission of the Catholic school: the task of evangelisation. This mission sets it apart from other educational endeavours, and it is in the hands of lay teachers and leaders. The mission of the Catholic school, as the literature review has shown, is central to the mission of the Church and the question is whether it today it can fulfil this mission (Buchanan et al., 2021; Congregation for Catholic Education, 1997; Rymarz, 2010). The literature suggests that, as a result, Catholic schools have a greater missional intent and agility and a new willingness to embrace Catholic tradition and context when acting as agents of the new evangelisation (McGrath, 2014). The way middle leaders experience their formation and grow in their own faith can contribute to this mission of intentionality and agility, thereby potentially ensuring the success of mission and evangelisation that takes place within Catholic secondary schools. Staff formation, as stated expressly in *Educating Together in Catholic Schools: A Shared Mission Between Consecrated Persons and the Lay Faithful* (2007) according to the document analysis and literature assessment, is a significant endeavour in maintaining genuine Catholic schools.

The results of this study have shown that middle leaders understand the mission of the Catholic school, and indicate the importance of carrying it out. The appropriateness of formation experiences for middle leaders is therefore important given the significant evangelising role middle leaders perform in Catholic schools. Formation shapes the faith life of middle leader, which is supported in the literature by the research of Convey (2010) who highlights the importance of the faith dimension of teaching and leading in a Catholic school. Convey's (2010) study confirms that religious factors are a motivator for teachers who choose to teach in Catholic schools but also underscores the tension that arises from determining who

does and does not understand the mission of the Church. Given this difficulty and the current context of Catholic education, the adequacy of the formation experiences offered to middle leaders is particularly important. Despite time pressures, responsibilities beyond those of the Church and heavy workloads, the clearer teachers (and, for the purposes of this study, middle leaders) are about their mission, the more likely they are to be committed to it as reflected in their daily actions (Deal & Peterson, 2003). More importantly, teachers, as Palmer (2007) points out, teach who they are. The clearer they are about their own beliefs and its connection to mission, purpose and leadership, the greater their impact on what they do and how they do it in their leadership.

As the scholarly literature shows, the homogeneous culture of "being Catholic" has changed (Dixon, 2006; Hughes, 2003; McLaughlin, 2008). Attendance at mass and traditional educational patterns can no longer be assumed, and exposure to Catholicism is primarily through Catholic schooling (Rolheiser, 2008; Rymarz, 2004). As a result, religious literacy and understanding has diminished, which indicates a greater significance on the need for adequate formation experiences for those charged with the evangelising mission of the Church in Catholic schools, which includes the middle leaders who are the focus of this study. The most important aspects of adequate formation, according to McLaughlin (2008), are suitable academic rigour, pedagogical competence and a formation of the heart. The adequacy of one's formation, in turn, brings one into relationship with Christ.

A critique of the data identified existing strengths of current formation policies and programs. Church documents clearly outline the religious formation required for middle leaders to carry out their mission of evangelisation. The adequacy of current policies and programs related to religious formation to prepare middle leaders to carry out their evangelising responsibilities can be examined through their assessment of the positive (and less positive) experiences they have had during their tenure in middle leadership. Positive experiences are characterised by relevant, engaging and inviting opportunities that meet

middle leaders at their level and acknowledge they have different faith understandings. The research of Sultmann and Brown (2014), who define *formation* as a process of ongoing renewal in the mind's life, supports that idea in the literature. With this approach, it comprises personal and community reflection processes that draw on tradition, respond to the signs of the times and promote faith as a part of the everyday lives of people and their community. This support for a formation experience that draws on tradition and promotes the daily life of middle leaders was expressed by one respondent as "*actually being able to sit down and analyse text; actually looking at what it's all about and have a better understanding of what it's about in context*" (I6). Another saw this promotion of daily life in the context of "f*eeding the homeless under the umbrella of social justice is really at the core of formation*" (I3) and "*to be involved in social justice initiatives at a school level*" (L109). Middle leaders spoke of a connection between positive experiences and engaging experiences that aligned with what was offered to them in terms of their professional academic learning: *"know your staff first, and then you'll know how to target your formation opportunities. Something that is energizing, just like your authentic learning. Is it meaningful to your staff? Is it engaging?"* (I7). One interviewee pointed out that such experiences need to be welcoming and take into account time commitments: *"but I think if people do not choose to participate in these kinds of faith formation retreats or conferences and take time out of their daily lives they will not find time to develop their faith"* (I8).

Middle leaders who had less positive formation experiences cited "relevance" and "meeting their needs" as critical factors. The mandatory once-a-year staff formation day was rated differently depending on the content, how it was delivered, and participants' attitudes toward it. Only 18 per cent of middle leaders surveyed described this day as a positive experience, while 22 per cent described it as a less positive experience. This was reflected in comments such as, "*PD days could be used a bit more*" (I5), "*I think it needs to be interesting content. There needs to be a story to it, sharing of experiences and stories and being able to*

get something out of it" (I2) and *"well, it just depends if you are being talked to all the time. And I think if some of the speakers we have had come across as a little bit too preachy, that puts some people off. I do not think the way they speak appeals to every member of staff"* (I7). One middle leader said, in reference to their perception of the mundanity of the day, *"oh, very. Address the different types of employees you have"* (I7). The same leader continued, *"if they seem forced, it puts people off"* (I7), underscoring the need for formation to be relevant, and to ensure meaning and engagement in such experiences. This requires that those planning such formation opportunities know their people: *"they need to meet people where they are and know that they are at different levels in their faith"* (I7). This is supported by Sultmann & Brown (2019), who came to the conclusion that formation is centred on relationships that are in line with the school's objective and are essential to life.

The results of this study indicate that positive formation experiences influenced the leadership of middle leader participants. There were voices that yearned for more opportunities. For example, one leader suggested, *"I think a little more preparation for leaders as leaders would be useful"* (I5). Another suggested the need for more opportunities thus: *"I think it's important to offer courses and opportunities for middle leaders to help them with their training. You can do your own thing, but it would be good if Catholic schools could offer more"* (I7). This yearning and need for more leadership formation is echoed by Bolman and Deal (1995) in their statement that "the heart of leadership lies in the heart of leaders, in the actions and especially in the decisions and decision-making processes of leaders" (p. 21). The middle leaders in this study yearned for more opportunities to educate the heart. The perceived lack of opportunities, according to the participants in this study, is a gap in program offerings. One of the participants said*, "we do not worry too much about their training, we just expect them to go ahead and get started. So I wonder if there are not ways to develop our staff earlier than we do"* (I5).

A critical review of the data also revealed gaps in the adequacy of the formation experiences offered to the middle leaders in this study. The first of these gaps was found between the Church's understanding of the middle leaders' ecclesial responsibilities and what the middle leaders viewed as their evangelising roles. Middle leaders spoke of their own difficulties with the Catholic faith when it comes to sensitive issues. One leader responded to such a question in class with, "*that's a pretty heavy topic that we are not going to deal with right now. We have to be careful to uphold the faith of the Catholic Church*" (I2). This viewpoint is supported by the literature, which highlights the perceived internal conflict that many teachers feel when working at a Catholic school (O'Brien, 2005). There is also a divide between the Church and society. Despite giving the impression that the Catholic school might exist separate from the pluralistic and secular community in which it is located, it is evident in the findings that there are tensions within middle leaders. A discussion of this general transition in post-modern Australia is found in Chapter 2.

A further gap regarding the adequacy of formation experiences appears to be a disconnect between the Catholic school and the parish. Given that many people experience evangelisation and a relationship to the Church in Catholic schools, not parishes, the claim that the parish is important to the Catholic school (Harrington, 2006) is oversimplified. To contextualise this reality, in 2016 only 11.8 per cent of the Catholic population attended mass every week, and 61 per cent of Catholic secondary school teachers self-identify as Catholic, of whom only 25 per cent regularly attend religious services (National Centre for Pastoral Research, 2021). The Catholic school is most of the staff's only regular exposure to Catholicism (National Catholic Education Commission, 2016, p. 11) and it appears vital for the Church and school to collaborate in order to close the post-ecclesialism gap. According to the literature, the gap is growing (Battams, 2002; Quillinan, 1997). If Church authorities are not attuned to this "post-ecclesial" experience, then Battams' (2002) analogy of the Church becoming a "fringe-dweller" of the Catholic educational enterprise may come to fruition. This

disconnection from the parish is exacerbated by the fact that although "schools are the Church for many, they are not equipped theologically or organisationally to do what this requires. This is the responsibility of the local Church as a whole" (Battams, 2002, p. 383).

5.3.4. Summary

If Catholic schools are to succeed in their mission to evangelise the next generation of emerging leaders, the formation of those who have an evangelising role is critical. Findings in this study suggest that middle leaders perceived their religious formation as relevant to their leadership role and supportive of them in their evangelising role. Relevant policies and programs, as described in 5.3.1, emphasise the importance of lay staff in Catholic schools and reaffirm the Church's commitment to supporting the religious formation of all employees. However, an analysis of these documents revealed that there are limited formation opportunities for middle leaders and no evidence that a one size fits all approach is appropriate. This gap in the provision of formation opportunities is highlighted by Gallagher (2007), who notes that aspiring leaders, many of whom are in middle leadership, have difficulty articulating the faith dimension of their leadership.

The findings of this study highlight that the work of the middle leader in schools is integral and encompasses all dimensions of education. It is generally "connected to, and intricately entangled with, other educational practices concerned with teaching, student learning, professional learning, leading and administration, researching, and evaluation" (Grootenboer et al., 2020, p. 19). It has been shown that middle leaders in Catholic secondary schools, like all school middle leaders, have leadership responsibilities in the pastoral, social, physical, wellbeing and academic domains. In addition to these responsibilities, Catholic school middle leaders also hold an evangelising role, which is another dimension of leadership that transcends all other responsibilities and permeates all aspects of the school. This evangelising role extends to the classroom, the recess yard, the staffroom, the libraries,

the sporting fields and the tuck-shops. The results of this study show that middle leaders are consistent in their beliefs of this evangelising role and the need for religious formation at the personal, educational and leadership levels. Middle leaders understand the mission of the Church and have a clear understanding of the role they play. They realise that religious formation is where their soul and their role converge (Palmer, 2004). In a general sense, middle leaders lead in order to positively affect – both directly and indirectly – teaching and student learning. And while it is widely understood that middle leaders play a crucial role in education, this role also comes with conflicts related to the necessity of managing expectations from both above and below at the same time. If, as the research of Lipscombe et al. (2021) indicates, from an educational perspective, that the existing professional learning and research on middle leaders is not yet sufficient to equip them for the complexity of their role, then it can be argued that there is a dearth of research on the formation for mission specifically for middle leaders, which highlights the importance of this research.

Middle leaders recognise the need for purposeful, relevant and engaging formation experiences to carry out their evangelising responsibilities, just as they receive professional learning opportunities to carry out their pastoral, social, physical, wellbeing and academic leadership responsibilities. They emphasise the importance of prayer and reflection, especially in the current and contemporary context of a busy and fast-paced Catholic secondary school. This study underscores that the personal formation experience of middle school leaders is critical to fulfilling their ecclesial responsibilities and expectations as they project the state of their souls to their students (Palmer, 1998). The findings of this study highlight the need for middle leaders, as emerging senior leaders in Catholic secondary schools, to have ongoing, relevant, and purposeful formation experiences for themselves – as teachers and as middle leaders – which will support their preparation for their ongoing evangelising role.

The findings of this study suggest that Sydney Catholic schools provide opportunities for religious formation for leadership, but the adequacy of these opportunities is questioned.

The findings reveal a number of strengths of current policies and programs and, at the same time, a number of weaknesses. Catholic schools have increased the intentionality and agility of their mission (McGrath, 2014) and seek to meet middle leaders at their personal level. In addition, middle leaders understand the mission of the school, with current policies and programs aiming to support them in their work. There has been an attempt, on the part of the diocese, to connect mission and purpose. Middle leaders believe that the adequacy of religious formation opportunities is optimised when they are characterised by relevant, engaging and invitational opportunities.

This study identified gaps in the adequacy of the formation experiences offered to middle leaders. One such gap was identified between the Church's understanding of the ecclesial responsibilities of middle leaders and what middle leaders saw as their evangelising role. This is recognised by O'Brien (2005) as the dissonance that many teachers experience when working in Catholic schools. Another divide was noted between the Church and society. Consequently, there is a gap between the Catholic school and the parish, with the literature suggesting that this gap is widening (Battams, 2002; Quillinan, 1997). As indicated by this study, middle leaders in Catholic secondary schools are aware of their evangelising role in continuing the mission of the Church. These lay men and women require an intentional, relevant, and ongoing program of formation (National Catholic Education Commission, 2017; Rymarz, 2002, 2009). This once again highlights the significant role middle leaders play in Catholic education today, and that further research on middle leadership formation is necessary.

The nature of this study provides field research data on the theoretical requirement of the purported intentional, relevant, and ongoing program of formation (National Catholic Education Commission, 2017; Rymarz, 2002, 2009). Further exploration that examines how religion is practiced day-to-day without assuming that it would fit in a program of formation for mission could be beneficial. It is noted that fulfilling the requirements of the *Accreditation*

Policy to Work, Teach and Lead in Sydney Catholic Schools (Sydney Catholic Schools, 2011) which aims to support the school's mission to engage all staff in the Catholic life of the school, promote professional and academic formation, ensuring that leaders in Catholic schools have the necessary academic knowledge and abilities for leading a religious community is not a guarantee of faith maturity. Further exploration to examine how middle leaders respond in their day-to-day work beyond this theoretical agreement and an understanding of the dynamics at play is necessary This would provide data on how more formational methods might produce different outcomes in the field than the more catechetical efforts that are the subject of this study.

The gaps identified in this study also need to be viewed contextually within the current milieus within which Catholic schools operate. This milieu poses challenges for leaders in Catholic schools as they are expected to evangelise and ensure religious literacy of students along with their academic and pastoral work. Middle leaders are asked to be "new evangelists" who may "proclaim and spread" the Gospel message, and they must actively promote the school's Catholic mission and identity (Pontifical Council for Promoting New Evangelization, 2020, p. 31). The sociology of Catholic identity, especially given the impact from the Royal Commission into *Institutional Responses to Child Sexual Abuse*, alongside the public discussion on a range of social phenomena, including same-sex relationships (Sheridan, 2017), adds weight to this shift away from Christianity and the willingness of teachers stepping into leadership roles in Catholic schools. While this view causes a great deal of discomfort in the context of Catholic education, it raises questions and invites discussion about what will replace the once dominant voice of the Catholic religious tradition. Social forces, the public culture wars and the declaring of a Catholic identity are important factors in crafting formation policy.

The findings of this study suggest new knowledge that will help to create a new paradigm for religious formation and new strategies to equip middle leaders to fulfil the

Church's ecclesial expectations. The reconceptualisation of formation policies and programs is proposed in Section 5.4.

5.4. Reconceptualisation of formation policies and programs

The findings of this study propose a new paradigm for religious formation programs for middle leaders in Catholic secondary schools. The findings suggest a new way to form current middle leaders which can equip them to carry out their current ecclesial expectations and form the pool from which emerging senior leaders in Catholic schools will come. The changing Church demographics in the context of the secular and pluralistic world in which Catholic schools exist require a religious formation equivalent to professional formation (Miller, 2007). This study indicates that one potential strategy is to consider reconceptualising an approach to formation that provides guidance and purpose, builds confidence in religious literacy and understanding, and is adaptable for sustainability. Then, how does that appear at the diocesan level?, and what are the key drivers for change that allow for invitational and ongoing formation experiences for middle leaders?

An approach that is concerned, in part, with enabling individual capacity is required in order to establish a culture of deep learning where direction, mission, and purpose are shaped by a core belief system and practises are expressed and nurtured through intentional interactions of people (Fullan, 2006). The result of this study, along with the literature, have shown that middle leaders are active and key participants in the mission of the Church and that their evangelising role within the school is critical to that mission. Catholic schools are unique in that they strive to develop the full person, which calls for them to engage their students on all levels - physical, intellectual, vocational, social, emotional, aesthetic, moral, and religious (Flynn & Mok, 2002). However, there needs to be alignment between the ecclesial expectations of the Church and those who are in many ways the face of the Church, and an assurance that those who are involved in Catholic education ministry are also formed

in the uniqueness of the mission of Catholic education. Given the role they play within Catholic secondary schools, the middle leaders who are the topic of this study require religious formation on par with their general, cultural and (notably) professional formation.

From the discussion of the findings, it is strongly suggested that formation in Catholic schools as a whole is not only about the community, but also about the individual. Rather than being a solitary endeavour, the production of identity is a collaborative effort between the person and contextual social and cultural influences (Schachter, 2005). A new formation paradigm can help address some of the gaps and complexities identified in this discussion of results regarding "one size does not fit all", and the need for formation experiences to be relevant and meet the needs of middle leaders. Catholic education aims to form individuals in light of the Gospel (physical, social, academic, ethical, moral and spiritual). In addition, further consideration needs to be given to the role and responsibility of dioceses and administrators in Catholic school systems in developing a new way of thinking to enhance the religious formation experience for middle leaders.

By establishing an overarching conceptual framework for formation, the discussion of the findings adds something new to the literature that seeks to strengthen the question of who – who is the self that teaches and leads and that constructively builds on the questions of what, how, and why that have traditionally shaped most of the professional learning to which religious formation has been compared? It is the "who" that lies at the core of formation for leadership. This new paradigm of formation recognises the vocation of those who seek to provide Catholic education. Finally, this model places the dynamic interactive process in the context of current Catholic education, which aspires to advance the Church's mission while also acknowledging the personal and communal nature of religious formation.

Figure 9

Reconceptualised formation framework
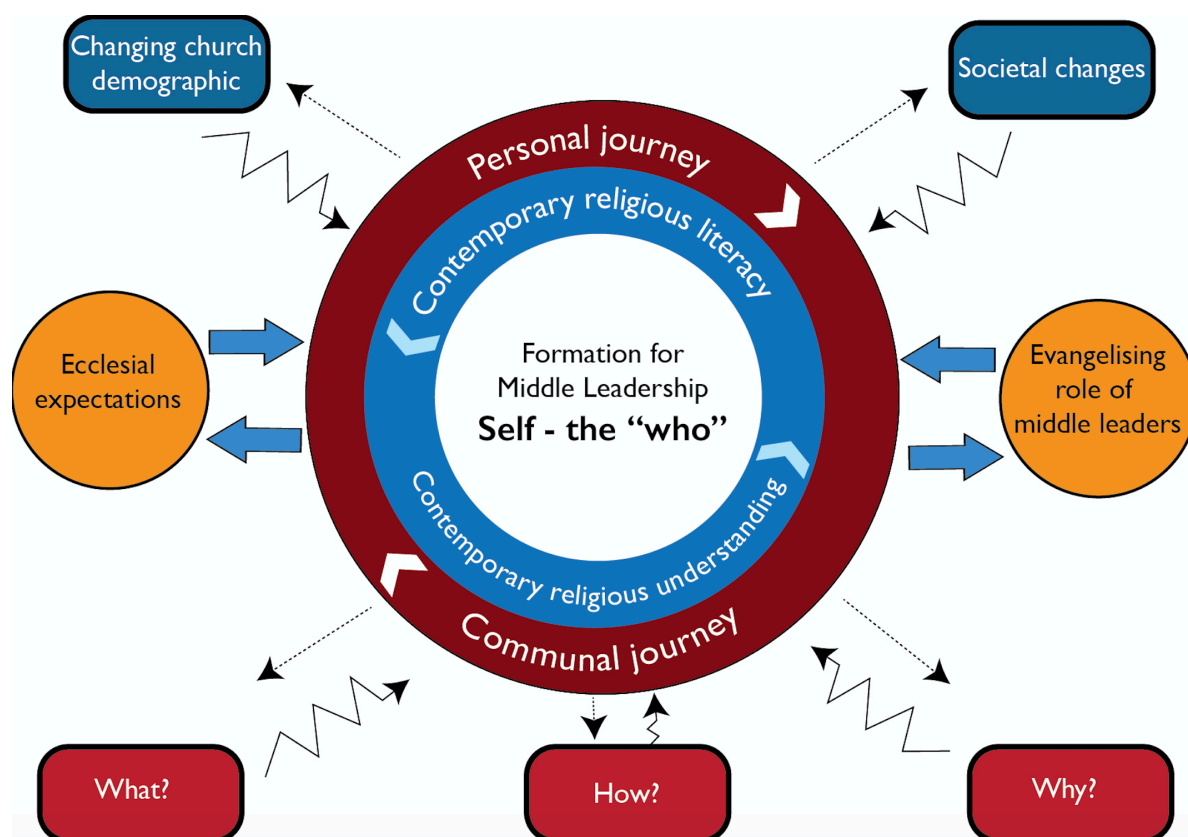
5.5. The research question and summary

The major research question and its sub-questions were addressed in this chapter's

examination of the findings from the document analysis, survey, and semi-structured

interviews. The main research question for this study was: "*What is the nature and aspects of*

religious formation that is provided to middle leaders in Catholic schools? And how do these

middle leaders view their formation experience for leadership in a Catholic school?" The

following research sub-questions helped guide the gathering of relevant data that enabled the

researcher to provide a comprehensive answer to the research question.

RSQ1 What are the ecclesial expectations of school leaders in general and middle

leadership in particular?

RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?

RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

The findings in this research draw attention to the context and role that the Church and Catholic schools play in providing opportunities for the formation of middle leaders to fulfil their ecclesial responsibilities. The data consistently show that middle leaders in Catholic secondary schools are aware of the significant role they play in fulfilling the evangelising mission of the Church, which is of significant relevance given faith leadership in schools today is predominantly the responsibility of lay leaders. The findings indicate that middle leaders in Catholic secondary schools require the need for intentional, ongoing and reflective formation programs.

The findings of this study indicate that if Catholic schools are to succeed in their mission to evangelise the next generation, the formation of those who have an evangelising role is critical. The study reveals that Sydney Catholic schools do provide opportunities for religious formation for leadership, but the adequacy of these opportunities is questioned. While a number of strengths of current policies and programs are identified there are also a number of weaknesses.

Generally, it seems that the middle leader participants in this study, in response to the four research sub-questions, indicated that religious formation is critical to their religious leadership and their evangelising role in Catholic secondary schools. The Catholic secondary school aspires to be an authentic, evangelising agent of the Church and the findings of this study consistently indicate that the Catholic school wants to actively contribute to the evangelising mission of the Church.

Chapter 5: Discussion of Results

The current milieus within which these schools operate – characterised by the minimal presence of religious clerics who are dedicated to teaching and learning, the non-practicing tendencies among many self-declared Catholics, and the limitations of the middle leaders' deep religious knowledge and literacy – present challenges in achieving the "new evangelisation" and meeting the ecclesial expectations of the Church.

Chapter 6: Conclusions and Recommendations

6.1. Introduction

The research problem underpinning this study was the critical nature of the formation for mission opportunities for middle leaders in Catholic secondary schools given the ecclesial expectations of the Church. It warrants attention through academic study as a significant research issue because, firstly, the Catholic Church acknowledges a shift from religious to secular leadership in Catholic schools. Secondly, because it gives middle leaders a voice in the formation for mission they are afforded and experience, and provides a framework for how middle leaders experience formation for mission. Finally, the research is of significance to Church leaders and Catholic education administrators as they review, propose and formulate processes to ensure that Catholic schools remain authentically Catholic. The purpose of this research study, therefore, was to examine how middle leaders in Catholic secondary schools perceive their role as faith leaders and to understand how formation for mission might better prepare them to fulfil their ecclesial responsibilities.

This final chapter presents an overview of the research study and its conclusions, and answers the research questions, while addressing the limitations of the study. Recommendations are made for Church and school authorities that flow from the findings of this study which have both a theoretical and practical dimension.

6.2. Research questions

The major research question underpinning the purpose of this research was: "*What is the nature and aspects of religious formation that is provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school?*" Four research sub-questions were determined from a review of the

literature, specifically in terms of the religious formation for mission offered to middle leaders in Catholic secondary schools, and how these middle leaders view their formation experience for leadership. The four research sub-questions that directed this research were:

RSQ1 What are the ecclesial expectations of school leaders in general and middle leadership in particular?

RSQ2 How do middle leaders in Catholic secondary schools understand their evangelising role?

RSQ3 How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

RSQ4 Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

6.3. Overview of the research study

The study was divided into six chapters. Chapter 1 outlined the context and scope of the research problem. This chapter addressed the ecclesial identity and purpose of Catholic education and examined the role of teaching, the changing landscape in terms of demographics and parish involvement, and the need for formation for mission and purpose. The nature of the problem, the purpose and significance of the research, and the overall structure of the work were outlined.

In Chapter 2, the literature was reviewed to provide a foundation for developing the research questions. From the literature, it appeared that much has been written about teachers' faith lives and their adherence to the Catholic way of life. Therefore, this chapter examined the faith lives of Catholic teachers in light of the fact that they are increasingly distancing themselves from the Church. The literature also examined middle leadership in Catholic secondary schools and the important role middle leaders play in the evangelising mission of

the school. Religious formation within Catholic education was examined in the secular and pluralistic world in which Catholic schools are located.

Methodology was explored in the Chapter 3. An interpretive mixed-methods approach was adopted, incorporating both quantitative and qualitative research methods to analyse and sort the data. Case study was chosen as the methodology, and data were collected through the strategies of document analysis, online survey and semi-structured interviews. The methods of data collection were discussed as well as issues of verification, ethics and limitations of the design of this research.

Chapter 4 presented the analysis of the data, which falls into two broad categories: quantitative analysis, which includes descriptive statistics and inferential statistics from the online survey data, and qualitative analysis of the documents – open-ended responses from the online survey and semi-structured interviews. Chapter 5 discussed the findings reported in Chapter 4, guided by the major research question. A reconceptualisation of formation policies and programs was presented.

The study was an innovative and pioneering piece of research on the religious formation for leadership of middle leaders in Catholic secondary schools because it had no recognised body of research or predecessor in Catholic educational systems.

6.4. Research design

Given the aim of the study, a mixed-methods approach was considered the logical methodological choice. This was done through an interpretivist design using constructionism and symbolic interactionism to inform the research design, data collection and data analysis. Case study was chosen as the methodology and data were collected through the strategies of document analysis, online survey and semi-structured interviews. Using an interpretivist design, this research had an interest in how middle leaders experience formation for mission and how they might be better prepared to fulfil their ecclesial responsibilities.

The research design was organised into three distinct study phases. The first phase involved the collection and analysis of the data from the document analysis. These Church documents helped the researcher to understand the ecclesial expectations of Catholic school leaders, and to determine the purpose, mission, identity and values of Catholic schools. The second phase involved the collection and analysis of quantitative and qualitative survey data. Informed by the document analysis, the online survey was structured in five parts. The third and final phase of the study involved the collection and analysis of data from the semi-structured in-depth interviews of a small sample of middle leaders (who volunteered to be interviewed) to understand their formation experience as middle leaders and the adequacy of their formation experience to meet the Church expectations of their middle leadership role.

The survey participants in this research were middle leaders drawn from within the metropolitan eastern region of the Archdiocese of Sydney. The survey was sent to 142 middle leaders and elicited 111 complete responses. Of the 111 middle leaders who completed the survey, eight agreed voluntarily to participate in a one-to-one interview. Of these, eight were interviewed, all of whom held middle leadership positions.

6.5. Conclusions of the study: answering the research questions

The findings in this research draw attention to the context and central role that the Church and Catholic schools play in providing opportunities for the formation of middle leaders to fulfil their ecclesial responsibilities. A synthesis of research findings was generated using a mixed-methods approach to generate answers to the research questions. The conclusions to Research Sub-Question 1 were drawn from the collection and analysis of the data from the document analysis. The conclusions to Research Sub-Question 2 and Research Sub-Question 3 were drawn from the collection and analysis of quantitative and qualitative survey data and the qualitative data from the semi-structured one-to-one interviews with middle leader participants. And the conclusions to Research Sub-Question 4 were drawn from the document

analysis, the quantitative and qualitative data from the survey, and the qualitative data from the semi-structured one-to-one interviews with middle leader participants.

Given that the results were acquired using a case study and applied to a specific region of the Sydney Diocese, they should be viewed as illustrative and generalised and not entirely descriptive of the population of Catholic secondary schools.

The findings from the discussion of results in Chapter 5 have contributed to the following conclusions of this study.

6.5.1. Research Sub-Question 1

What are the ecclesial expectations of school leaders in general and middle leadership in particular?

The ecclesial expectations of Catholic school leaders generally are well articulated in the magisterial documents. The documentary material described in Section 4.2, and subsequently discussed in Section 5.2.1, provided comprehensive and explicit evidence of the Catholic Church's expectations of the role of school leadership in general in achieving the purpose and mission of the Catholic school. The findings show that the Church, through key magisterial documents and complementary Sydney Catholic Schools policy documents, has exerted a continuous challenge and pressure to ensure that schools are staffed and led by people who contribute to the evangelising goals of the school.

Notwithstanding the limitations of the case study design, the findings of this study identified that the ecclesial expectations of Catholic school leaders – but more specifically, those in senior leadership roles – is well articulated in both the literature and key magisterial documents. This key documentation emphasises the role, mission and purpose of Catholic schools as part of the Church.

This study found that the ecclesial expectations of Catholic school middle leaders are not as clearly specified as they are for senior leaders, and the magisterial documents do not

specifically address middle leaders. The discussion of the results in Chapter 5 and the scholarly literature highlight that the role of senior leadership in Catholic schools, namely the role of principal, assistant principal and religious education coordinator are clearly outlined. The same cannot be said for middle leaders in Catholic secondary schools for whom ecclesial expectations are held and who hold an important evangelising role. Middle leaders are called to live the Gospel in a way that reflects the person and message of Christ.

This study provided a comprehensive investigation of religious leadership at the middle leadership level. The study identified that the ecclesial expectations of middle leaders are not explicit and do not specifically address the various roles of middle leader in Catholic secondary schools. The study revealed that the ecclesial expectations of Catholic school middle leaders specifically are not clearly translated in the key policy documents and formation programs on offer. Particularly from the analysis of key documents (Section 4.2.2), Sydney Catholic Schools seeks to define the conditions that are seen as essential to ensure the Catholicity of those who hold senior leadership positions; however, there is no clarity within the policy documents or programs to define the specific conditions that are seen as essential to ensure the Catholicity of those who hold middle leadership positions within Catholic schools. Although the Bishops seek to appoint committed Catholics to leadership positions, no specificity has been provided to support middle leadership in how to bring these expectations to fruition.

Hence, the findings of this study suggest that the ecclesial expectations of Catholic school middle leaders are not clearly translated in the myriad of policy documents and religious formation programs available.

6.5.2. Research Sub-Question 2

How do middle leaders in Catholic secondary schools understand their evangelising role?

This study revealed that a significant majority of middle leaders have an understanding of the imperative evangelising role they play in Catholic secondary schools, which is expressed at a personal (self), educational (teacher) and leadership (middle leader) perspective. This study highlighted the influence middle leaders have and the instrumental role they play in affecting change within their school context. While the study demonstrated a match between the intentions and expectations of the Church and the understanding and expectations of the middle leaders, it found that little attention has been paid to the formation of middle leaders to prepare them for their religious leadership role. Lay middle leaders in Catholic secondary schools are expected not only to be leaders in the pastoral, social, physical and academic domains, but also to find authentic and effective ways of engaging students with their Catholic faith.

Despite the limitations of the case study design, this research concluded, particularly from the results of the survey and semi-structured interviews, that middle leaders are aware of the significant role they play in fulfilling the evangelising mission of the Church. Faith leadership in Catholic schools is predominately the responsibility of lay leaders, and the middle leaders, who were the subject of this study, understand their evangelising role as expressed at a personal (self), educational (teaching) and leadership (middle leader) level.

This research also revealed that while middle leaders have an understanding of the imperative evangelising role they play in Catholic schools, they also hold a perception that they lack currency of understanding of key Church teachings, ecclesial expectations or the Catholic preparation and experience from a personal perspective. The discussion of results (Section 5.2) offered evidence of middle leaders' perceptions of their beliefs about evangelisation. Overall, middle leaders have a positive orientation to the new evangelisation, which is supported by the notion that the Catholic Church foresees the school as having an ecclesial identity.

The study confirmed that, from a teaching perspective, middle leaders believe that their evangelising role as a teacher of faith extends beyond the confines of their classrooms. Leading faith is strongly supported by participants in this study, with middle leaders recognising the importance of Gospel values permeating their leadership. While the importance of expressing faith as a leader is emphasised by all participants, there is a perceived lack of connection with the local parish.

6.5.3. Research Sub-Question 3

How do middle leaders in Catholic secondary schools perceive their preparation (formation) to meet their evangelising role?

The findings of this study indicate there is a gap in the provision of formation opportunities for middle leaders to help them to articulate the faith dimension of their leadership role; and that if Catholic schools are to succeed in their mission to evangelise, the formation of those who have an evangelising role is critical. Findings suggest that the middle leaders in this study perceive their religious formation as relevant to their leadership role and supportive of them in their evangelising role. However, the study revealed that there are limited formation opportunities for middle leaders and there is no evidence that a one size fits all approach is appropriate. This study revealed there is a perceived gap in the provision of religious formation opportunities to support them in executing their evangelising role and responsibility from a leadership perspective.

Notwithstanding the limitations of the case study design, this study concluded that middle leaders are consistent in their beliefs about their evangelising role and the need for their religious formation at the personal, educational and leadership levels. As was discussed in Section 5.3, while middle leaders realise that religious formation is where their soul and their role converge, there are limited religious formation opportunities specifically directed at the role of middle leader.

The findings of this study also confirmed that religious formation opportunities need to be purposeful, invitational, relevant and engaging to support middle leaders both in their current roles and as the pool from which the next senior leaders in Catholic secondary schools will be drawn. The study underscored that the personal formation experience of middle school leaders is critical to fulfilling ecclesial responsibilities. The findings of this study highlighted the need for middle leaders to engage in formation experiences for themselves – as teachers and as middle leaders – which will support their preparation (formation) for their ongoing evangelising role. This study concluded that religious formation opportunities need to be purposeful, relevant and engaging in order to prepare middle leaders for the expectations of their role currently and into the future.

While the findings of this study consistently show that middle leaders in Catholic secondary schools are aware of the significant role they play in fulfilling the evangelising mission of the Church, there is an apparent need for intentional, ongoing and reflective formation programs.

6.5.4. Research Sub-Question 4

Are the current policies and formation programs adequate in preparing middle leaders to carry out their evangelising responsibilities?

The results of this study found that middle leaders moderately agree that Catholic educational authorities provide adequate opportunities for religious leadership formation. There were mixed results when positive or negative formation experiences were mentioned, and participants' responses varied widely, raising questions about the overall adequacy of formation programs offered to middle leaders to assist them in carrying out their evangelising role and furthering the goals of the Church. The findings revealed both strengths and weaknesses in current policies and programs, which confirmed inconsistencies in the adequacy of formation offered to middle leaders in Catholic secondary schools.

While there appear to be a number of strengths of current policies and programs there are, at the same time, a number of weaknesses. Sydney Catholic schools do provide opportunities for religious formation for leadership; however the adequacy of these opportunities is questioned. Middle leaders in Catholic secondary schools understand the mission of the school and, although current policies and programs aim to support their religious formation, middle leaders believe that the adequacy of religious formation opportunities are optimised when they are characterised by purposeful, relevant and engaging opportunities. The adequacy of formation experiences, then, seems to depend on how well those experiences reach middle leaders where they are, in order to meet their needs. Hence, there is a need to provide adequate formation for lay middle leaders in Catholic secondary schools with consideration of the various dimensions of middle leadership.

This study identified gaps in the adequacy of the formation experiences offered to the middle leaders. One such gap was identified between the Church's understanding of the ecclesial responsibilities of middle leaders and what middle leaders saw as their evangelising role. This adequacy is further questioned in the discussion of results in Chapter 5, where division was noted between the Church and society and the resulting gap between the Catholic school and the parish. The adequacy of current policies and programs related to religious formation to prepare middle leaders to carry out their evangelising responsibilities can be examined through their assessment of the positive (and less positive) experiences they have had during their tenure in middle leadership. Positive experiences are characterised by relevant, engaging and inviting opportunities that meet middle leaders at their level and acknowledge they have different faith understandings. Middle leaders who have had less positive formation experiences cite "relevance" and "meeting their needs" as critical factors.

6.5.5. Major research question

What is the nature and aspects of religious formation provided to middle leaders in Catholic schools? And how do these middle leaders view their formation experience for leadership in a Catholic school?

In summary, this study acknowledges that middle leaders play a key role in Catholic schools and a have a positive orientation to the evangelising role that they have undertaken. At the same time, middle leaders recognise a gap in the provision of formation opportunities to help them to articulate the faith dimension of their leadership role. Currently, Church documents only give a general indication of how to lead to strike out on new paths, and there is no distinction of how middle leaders, specifically are to take forward these ecclesial expectations.

Although the findings were acquired using a case study within a mixed-methods design and applied to a specific region of the Sydney Diocese, a major conclusion from this study, as drawn from the discussion of results in Chapter 5, indicated that religious formation is critical to the religious leadership of middle leaders and their evangelising role in Catholic secondary schools and as such religious formation program design and evaluation within the Archdiocese is necessary. The Church recognises that genuine faith cannot be imposed: it is freely accepted or rejected. If the educational and catechetical goals are explicit and openly stated, then middle leaders might be encouraged to engage with open hearts and thinking minds, and to embrace the formation opportunities afforded them. This then may meet Pope Francis' call for Catholic schools to be led and staffed by missionary disciples.

The findings from this thesis have made a significant contribution to the understanding of religious formation and the role it plays in preparing middle leaders to carry out their ecclesial responsibilities. Specifically, the research proposes a new paradigm for religious formation programs for middle leaders in Catholic secondary schools. The findings suggest a

new way to form current middle leaders that can equip them to carry out their current ecclesial expectations and form the pool from which emerging senior leaders in Catholic schools will come. The changing Church demographics in the context of the secular and pluralistic world in which Catholic schools exist require a religious formation for middle leaders that is equivalent to professional formation.

Middle leaders identify a need for an approach to formation for mission that provides guidance and purpose, builds confidence in religious literacy and understanding, and is adaptable for sustainability. In doing so, middle leaders advocate formation opportunities that enable invitational and ongoing formation experiences for middle leaders and emphasise the importance of prayer and reflection, especially in the current context of a busy and fast-paced Catholic secondary school. This study underscores that the personal formation experience of middle school leaders is critical to fulfilling their ecclesial responsibilities. The findings of this study highlight the need for middle leaders, as emerging senior leaders in Catholic secondary schools, to have ongoing, relevant and purposeful formation experiences for themselves – as teachers and as middle leaders – which will support their preparation for their ongoing evangelising role.

6.6. Limitations of the study

The investigation undertaken in this study contributed to understanding how religious formation assists middle leaders in their evangelising role to take forward the mission of the Catholic school. Some circumstances that may have influenced the study are outlined in this section.

The quality of the results may have been impacted by some aspects of the research design. The decision to limit the study to one region of a metropolitan Catholic school system is one such limitation. The researcher recognises the homogenous nature of the system within which the research was conducted, and that the recommendations may well not be

transferable to smaller or rural dioceses, and suggests that this might be an area of further research on the formation for mission for middle leaders in such contexts.

The limitations of the data collection methods of this study are also acknowledged. The analysis of the documents, which were both conceptual and operational, were limited in number given the plethora of magisterial documents available and were also those only produced in the Australian context.

The number of participants who volunteered to be interviewed was significantly less than the number of surveys conducted, so this aspect of the qualitative data must be addressed accordingly. The interview process was time consuming, requiring additional contact time for the middle leaders involved, which may have contributed to the low number of participants. Further research with a larger sample of participants would allow the conclusions to be generalised.

Given that the results were acquired using a case study within a mixed-methods design, they should be viewed as generalised and not entirely descriptive of the population of Catholic secondary schools. The term "generalisability" refers to the capacity to extrapolate findings across contexts (Yin, 2003); this is dependent on both the setting of the research as well as the contexts to which the results might be applied. For the findings to be transferrable, this study's goal was to provide a contextual description.

The generalisability of the findings, though not a major objective of the study, is noted. The relatively small number of survey and interview respondents who volunteered to be interviewed increased the risk of error when it comes to generalisation of results with the small-sizing nature of this study. The study may be limited in its analysis because results from participants will depend on their knowledge of the formation requirements and opportunities available to them. Additionally, large sampling can contribute to ensuring a representative population is tested. In the case of the quantitative and qualitative studies undertaken in this thesis, the reality that an insufficient number of middle leaders remains a possibility.

Chapter 6: Conclusions and Recommendations

Through review measures such an audit trail, member checking, and the utilisation of critical experts, these perceived limitations were acknowledged and addressed in the research design (Chapter 3). In addition, to address some of these limitations, the researcher also used three measures to collect data: document analysis, online survey and individual semi-structured interviews with middle leaders. In this way, the data was triangulated to promote credibility, authenticity and trustworthiness.

6.7. Recommendations

This study has identified the nature and aspects of religious formation that is provided to middle leaders in Catholic secondary schools. Although this study was limited to Catholic secondary schools in a specific Sydney Metropolitan region, it became clear as the study progressed that many of the findings and experiences coming from this setting could be used equally in the larger national milieu of Catholic education.

After completing this study and considering the conclusions of the study as presented in Section 6.5, and in view of the limitations discussed in Section 6.6, the following recommendations can be made.

6.7.1. Recommendation 1

Develop explicit expectations of the middle leaders to affirm the important evangelising role that middle leaders play in Catholic secondary schools.

The study findings concluded that while the ecclesial expectations of leaders is generally articulated by the Church through key magisterial and policy documents, the same cannot be said for the role of middle leader. One recommendation is that explicit expectations of the middle leaders be developed to affirm the important evangelising role that middle leaders play in Catholic secondary schools. This will ensure that there is no discrepancy between the intentions and expectations of the Church and the understanding and expectation of middle

leaders. This may well provide a response to post-ecclesialism that can be prevalent in Catholic school communities.

6.7.2. Recommendation 2

Pay greater attention to personal faith formation of middle leaders to equip them with the necessary religious literacy needed to carry out their role and to address the disconnect between theory and practice.

The study findings concluded that although the middle leaders who were the subject of this study have an understanding of the evangelising role they play, greater attention must be paid to their personal faith formation in order to equip them with the necessary religious literacy needed to carry out their role. Formation of self, "the who", of middle leaders needs to constructively build upon "the what", "the how" and "the why" that has traditionally shaped most professional learning. This recommendation situates the dynamic formative process within the context of contemporary Catholic education that seeks to progress the mission of the Church and recognises both the personal and communal nature of religious formation along with the current disconnect between theory and practice. The religious formation of middle leaders must be equal to the professional formation they receive.

6.7.3. Recommendation 3

Church authorities should explore ways to engage local clergy so as to better theologically equip middle leaders for their religious leadership.

The study also found that middle leaders do not feel connected to their local parish. To ensure that there is an ongoing commitment to a shard role in evangelisation, and to support middle leaders in carrying out their ecclesial expectations, Church authorities should explore ways to engage local clergy to better theologically equip middle leaders for their religious leadership. In the context of this study, the number of Parish Priests has declined, and with an ageing

priesthood, secondary schools have less parochial leadership to fall back on. Primary schools are on parish premises, but this is not the case for many Catholic secondary schools.

6.7.4. Recommendation 4

School and Church authorities should conduct an investigation into the role the local parish plays in supporting the religious formation of middle leaders.

Following from Recommendation 3, it would be worthwhile for school and Church authorities to conduct an investigation into the role the local parish plays in supporting the religious formation of middle leaders. Although the importance of expressing faith as a leader is emphasised by all participants, there is a perceived lack of connection with the local parish. Catholic schools, as faith-based schools, are outgrowths of parish and diocesan communities. Therefore, the relationship and role between parish and school is instrumental because the school is seen as a main arm of the Church, with middle leaders within the school having ecclesial responsibilities. Middle leaders recognise the difficulties Catholic schools face when confronted with changing demographics, dissonance between parish and school, and ongoing social change.

6.7.5. Recommendation 5

Catholic educational authorities should provide personalised formation for mission opportunities for middle leaders.

The study concluded that there is a gap in the current provision of religious formation opportunities to prepare middle leaders to carry out their evangelising roles. To ensure appropriate formation for mission opportunities, Catholic educational authorities should provide personalised opportunities for middle leaders. In order to carry out their pastoral, social, physical, wellbeing and academic leadership responsibilities, middle leaders should be

provided with religious formation opportunities that are the equivalent of the professional learning opportunities they are currently afforded.

6.7.6. Recommendation 6

Catholic educational authorities should offer relevant and engaging formation for mission opportunities to prepare middle leaders to carry out their evangelising roles.

This study concluded that the formation opportunities available to middle leaders has been inadequate. To address this finding, it is recommended that, to improve the intentionality of formation programs, Catholic educational authorities offer relevant and engaging formation opportunities to prepare middle leaders to carry out their evangelising roles. Church and school authorities must offer a wider variety of experiences, specifically targeted to middle leaders, that address their needs – and with the provision of sufficient time to make those experiences meaningful.

6.7.7. Recommendation 7

School authorities should conduct research to explore a comparison of the religious leadership expectations and conditions across the Catholic primary and secondary school sectors. In addition, further comparative research on the outcomes of the available formation opportunities could be undertaken.

Given Catholic schooling is both primary and secondary, school authorities conducting research to explore a comparison of the religious leadership expectations and conditions across the Catholic primary and secondary school sectors would give a broader perspective of religious leadership. Given the role that middle leaders play in Catholic schools, and the fact that their work is integral to the mission of the Church, further exploration of middle leadership formation is warranted.

6.8. Conclusion

To conclude, Catholic secondary schools now operate in a secular and pluralistic world. It is the reality of the times that the mission of the Catholic secondary school, as an agent of the Church, is to evangelise and that responsibility now rests with lay men and women who are charged with leading Catholic schools. While most research has been conducted on the leadership role of principals, there is very limited research on the evangelising role of middle leaders.

Some encouraging findings indicate that middle leaders have accepted the challenge of religious leadership and understand clearly the evangelising responsibility they hold. This research also suggests that many who work in Catholic schools are aware of the ecclesial expectations of the Church. From the findings of this study, a significant majority of middle leaders are open and willing to take forward the mission of the Church but require a religious formation to equip them with the necessary leadership skills that are in addition to the pastoral, social, physical, wellbeing and academic skills and responsibilities that sit within their middle leadership portfolio. This emanates a sense of confidence for the ongoing religious leadership in Catholic education.

The major challenge is sustaining and providing adequate religious formation for mission for middle leaders to carry out their evangelising role. At the heart of formation for middle leaders is the "who" self of leadership. This requires an approach to support the contemporary religious literacy and understanding of middle leaders to ensure a synergy between the role of middle leader and the ecclesial expectations of the Church. It also recognises the interrelated nature between the personal and communal journey of middle leadership that acknowledges shifts in society and changed Church demographics. Success in Catholic school communities will be determined by how well they navigate these challenges.

The findings of this study advocate the important role that middle leaders in Catholic secondary schools play in carrying out the evangelising role of the Church. However, improving and sustaining religious formation for mission for all middle leaders requires the exploration of new paradigms, requiring an approach that is commensurate with the religious understanding and literacy of middle leaders. The traditional patterns of formation, on which the Catholic Church and Catholic school have relied for many years, are no longer of relevance.

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Appendices

Appendix A: Ethics approval

Human Research Ethics Committee
Committee Approval Form

Principal Investigator/Supervisor: Associate Professor Shukri Sanber

Co-Investigators: N/A

Student Researcher: : Mr Mark Compton

Ethics approval has been granted for the following project:
Formation for leadership in Catholic schools: A case study of middle leaders in Catholic Secondary schools

for the period: 05/01/2015-31/12/2015

Human Research Ethics Committee (HREC) Register Number: 2014 349N

Special Condition/s of Approval
Prior to commencement of your research, the following permissions are required to be submitted to the ACU HREC:
N/A

The following standard conditions as stipulated in the *National Statement on Ethical Conduct in Research Involving Humans* (2007) apply:

(i) that Principal Investigators / Supervisors provide, on the form supplied by the Human Research Ethics Committee, annual reports on matters such as:
  - security of records
  - compliance with approved consent procedures and documentation
  - compliance with special conditions, and

(ii) that researchers report to the HREC immediately any matter that might affect the ethical acceptability of the protocol, such as:
  - proposed changes to the protocol
  - unforeseen circumstances or events
  - adverse effects on participants

The HREC will conduct an audit each year of all projects deemed to be of more than low risk. There will also be random audits of a sample of projects considered to be of negligible risk and low risk on all campuses each year.

Within one month of the conclusion of the project, researchers are required to complete a *Final Report Form* and submit it to the local Research Services Officer.

If the project continues for more than one year, researchers are required to complete an *Annual Progress Report Form* and submit it to the local Research Services Officer within one month of the anniversary date of the ethics approval.

Signed: ......█████████████...... Date: ....10/02/2015.....
(Research Services Officer, McAuley Campus)

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Appendix B: Metropolitan schools system approval

Catholic Education Office Sydney
www.ceosyd.catholic.edu.au

13 February 2015

Ref: Research Application 935

Mr Mark Compton

Dear Mark

RE: RESEARCH APPLICATION REF: 935 – LETTER OF APPROVAL

Thank you for the submission of your application to conduct research in Archdiocesan Catholic Schools under the jurisdiction of the Catholic Education Office (CEO) Sydney. Approval is given by CEO Sydney to conduct this study. **This approval is granted subject to full compliance with NSW Child Protection and Commonwealth Privacy Act legislation.** It is the prerogative of any Principal or staff member whom you might approach to decline your invitation to be involved in this study or to withdraw from involvement at any time. Any study involving the participation of students will require written, informed consent by parents/guardians.

Permission is given for you to approach the Principals of the schools nominated, listed below, requesting participants for your study: *"Formation for leadership in Catholic schools: A case study of middle leaders in Catholic Secondary schools"*.

Marist College Kogarah
Champagnat Catholic College, Pagewood
Marcellin College, Randwick
Our Lady of the Sacred Heart College, Kensington

Bethany College, Hurstville
St Ursula's College, Kingsgrove
Marist College, Penshurst
St Mary's Cathedral College, Sydney

COMMONWEALTH PRIVACY ACT
The privacy of the school and that of any school personnel or students involved in your study must, of course, be preserved at all times and comply with requirements under the Commonwealth Privacy Amendment (Private Sector) Act 2000. In complying with this legislation, the CEO Sydney has decided that individual research participants should not be identified in the report.

FURTHER REQUIREMENTS
It is a condition of approval that when your research has been completed you will forward a **summary report of the findings and/or recommendations** to this office as soon as results are to hand.

38 Renwick Street, PO Box 217, Leichhardt NSW 2040 • Phone (02) 9569 6111 • Fax (02) 9550 0052
Eastern Region 33 Banks Avenue, Daceyville NSW 2032 • Phone (02) 8344 3000 • Fax (02) 8344 3097
Inner Western Region 3 Keating Street, Lidcombe NSW 2141 (Locked Bag 83, 1825) • Phone (02) 9643 3600 • Fax (02) 9643 3609
Southern Region 300 The River Road, Revesby Heights NSW 2212 • Phone (02) 9772 7000 • Fax (02) 9772 7009

All correspondence relating to this Research should note 'Ref: Research Application 935'.

Please contact me at this office if there is any further information you require. I wish you well in this undertaking and look forward to learning about your findings.

Yours sincerely,

Dr Michael Bezzina
Director of Teaching and Learning
Email: research.centre@syd.catholic.edu.au

Appendix C: Principal consent form

ACU|education|
Transforming learning

INFORMATION LETTER TO PRINCIPAL

TITLE OF PROJECT: Formation for leadership in Catholic schools: A case study of middle leaders in Catholic Secondary schools

PRINCIPAL INVESTIGATOR: **Associate Professor Shukri Sanber**

STUDENT RESEARCHER: **Mark Compton**

Dear Principal,

I would like to seek your permission to contact middle leaders at your school to participate in a research project to investigate formation for leadership in Catholic schools. I intend to approach a number of secondary schools within the Eastern Region of Sydney CEO.

The commitment that is being sought from you is to encourage the voluntary commitment of your middle management. The particular teachers being sought are middle leaders in either a Coordinator 1 or Coordinator 2 position. These could include Year Coordinator's, Subject Coordinator's, Sports Coordinator, Liturgy Coordinator and any other Coordinator 1 or 2 particular to your school context. For the purpose of this study your Religious Education Coordinator is also invited to participate.

The commitment to this research project for voluntary participating teachers will be an online survey. From the online survey, 3 middle leaders will be selected to voluntarily take part in an interview for no more than 1 hour's duration. This research project is of minimal risk to teacher participants. If, however, any participant feels emotionally uncomfortable or in any other way distressed in the course of the interview, they will be able to terminate the interview immediately without incurring any negative consequences.

Interviews will be digitally recorded and participants will be prompted to share their thoughts and feelings about how they understand their leadership, how they understand the concept of formation, how they construct their Catholic identity and their perception of the relevance of the formation opportunities available to them. There will be no further demand on teachers' time beyond the 60 minute interview. The interview will be conducted in a mutually convenient location on your workplace campus. Throughout the data collection, all efforts will be made to minimise disruptions to school activities, which at all times will take precedence.

It is anticipated that this project will commence in Term 3, 2015 and will continue throughout the semester. It is anticipated that the student researcher would be on campus at your school for one day only and to complete the three interviews that day. You may cease your involvement in this project at any time, wholly at your discretion and without explanation.

Results of the research project will be published in the Doctoral thesis of the student researcher. Results may also be published in academic or professional journals or reported in CEO forums. These results will not identify participants or your school in any way.

There are no immediate or personal benefits which will accrue to you as a result of your involvement in this project.

Your involvement holds the potential to contribute to a better understanding of how middle leaders in Catholic schools experience formation for leadership.

The participation of all people will be fully voluntary. Data will be carefully safeguarded to ensure that the identity of all participants remains confidential. We anticipate there will be no risk to the participants, and no pressure will be put on any participant at any stage. Participants may withdraw at any time without giving a reason.

Any questions regarding this project should be directed to the Principal Investigator and/or the Student Researcher:

Principal Investigator Student Researcher
Name: Assoc Prof Shukri Sanber Name: Mark Compton
Telephone: **9701 4194** Telephone: 9808 1033

School: Education School: Holy Cross College
Campus Address: 25a Barker Road Address: 517 Victoria Road
Strathfield, NSW 2135 Ryde, NSW 2112

This research project has been reviewed by the Human Research Ethics Committee at Australian Catholic University. If you have any complaints or concerns about the conduct of the project, you may write to the Manager of the Human Research Ethics Committee care of the Office of the Deputy Vice Chancellor (Research).

Manager, Ethics
c/o Office of the Deputy Vice Chancellor (Research)
Australian Catholic University
North Sydney Campus
PO Box 968
NORTH SYDNEY, NSW 2059
Ph.: 02 9739 2519
Fax: 02 9739 2870
Email: res.ethics@acu.edu.au

Any complaint or concern will be treated in confidence and fully investigated. You will be informed of the outcome.

If you are willing that your school participate in this research about formation for middle leaders, could I ask that you read the accompanying consent form. This form does not commit your staff to volunteer for this research, but does indicate your approval that staff be invited to voluntarily participate in this research. Please sign one copy of the consent form for School Principal and return this signed copy to me, and keep one copy for your records.

Yours sincerely,

Mark Compton

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Consent Form for School Principal
(Principal's copy)

Formation for leadership in Catholic schools: A case study of middle leaders in Catholic Secondary schools Name of Principal Investigator: Assoc Prof Shukri Sanber

I , **…………………………...**, (Principal's name) have read and understood the information provided in the Letter to the Principal. Any questions I have asked have been answered to my satisfaction. I agree that my staff may, if they wish, participate in the following:

• online survey concerning their perceptions about religious formation
• interviews concerning their perceptions about religious formation

I realise that I may withdraw any and all participants from this project at any time.

I agree that research data collected for the study may be published or may be provided to other researchers in a form that does not identify any member of the school community in any personal way.

Name of principal: …………………………………………………………………..

School: ………………………………………………………………………...

Signature: ……………………………………… **Date**: ……………………………

Appendix D: Information letter to participants

ACU AUSTRALIAN CATHOLIC UNIVERSITY

ACU education
Transforming learning communities

Letter to participants

INFORMATION LETTER TO PARTICIPANTS

Ethics Register Number: 0000018277

Australian Catholic University
Limited
ABN 15 050 192 660
Strathfield Campus
25a Barker Road Strathfield
New South Wales 2135 Australia
Telephone 97014035
Facsimile 97014034
Email S00070578@myacu.edu.au
www.acu.edu.au

PROJECT TITLE: Formation for leadership in
Catholic schools: A case study of middle leaders in Catholic Secondary schools
PRINCIPAL INVESTIGATOR: Associate Professor Shukri Sanber
STUDENT RESEARCHER: Mark Compton
STUDENT'S DEGREE: EdD

Dear Participant,

You are invited to participate in research project that investigates the formation for leadership in Catholic schools. The purpose of this study is to explore the formation experience of middle leaders in these schools and their perception of its value to prepare them for leadership.

This project is being conducted by Mark Compton and will form the basis for the degree of Doctor of Education at Australian Catholic University under the supervision of Associate Professor Shukri Sanber. You are requested to participate in this research project. Your participation involves the completion of an online survey. The survey includes a combination of open-responses and select response type questions. It should not take your more than 15 minutes to complete the online survey. Once you submit your responses you will be asked if you would like to participate in an interview.

This research project is of minimal risk to you the participant. You are free to withdraw your consent to complete the survey at any time. You do not need to give your reasons. You just need to exit the survey. There are no consequences for your withdrawal.

Your participation in the project will contribute to a better understanding of the process of equipping Catholic school leaders. It will give you the opportunity to reflect on your own experience as a middle leader. Participation in this study is completely voluntary. You are not under any obligation to participate.

The survey data will be stored anonymously. You will not be required to provide your name. If you agree to participate in an interview your details will be stored in a different file. The reported data will not be identifiable. The findings will not be reported in a way that would help identify any individual person or individual school. No names or personal identifiers will be

used and data excerpts will be decontextualized, minimising any risk to your confidentiality. The research data also will be retained within a single, secure research database to protect your confidentiality.

Results of the research project will be published in the Doctoral thesis of the student researcher. Results may also be published in academic or professional journals.

Any questions regarding this project should be directed to the Principal Investigator and/or the Student Researcher:

Principal Investigator   Student Researcher
Name: Assoc Prof Shukri Sanber   Name: Mark Compton
Telephone: 9701 4194   Telephone: 9808 1033
School: Education   School: Holy Cross College
25a Barker Road Strathfield, NSW 2135   Address: 517 Victoria Road Ryde, NSW
2112

This research project has been reviewed by the Human Research Ethics Committee at Australian Catholic University. If you have any complaints or concerns about the conduct of the project, you may write to the Manager of the Human Research Ethics Committee care of the Office of the Deputy Vice Chancellor (Research).

Manager, Ethics
c/o Office of the Deputy Vice Chancellor (Research)
Australian Catholic University
North Sydney Campus
PO Box 968
NORTH SYDNEY, NSW 2059
Ph.: 02 9739 2519
Fax: 02 9739 2870
Email: res.ethics@acu.edu.au

Any complaint or concern will be treated in confidence and fully investigated. You will be informed of the outcome.

If you agree to participate in this research, please sign two copies of the consent form; retain one copy for your records and return the other copy to the Principal Investigator or Student researcher. You can do this either directly or via your Principal or nominated delegate.

Yours sincerely,

…………………………….   …………………………………..
Mark Compton   Shukri Sanber

Appendix E: Pilot survey for critical experts and pilot group

Pilot Survey

Draft Survey Questions

PROJECT TITLE: Formation for leadership in Catholic schools: A case study of middle leaders in Catholic Secondary schools

Background Questions

Section 1: This part of the survey is designed to gather background information that would help in the analysis of the responses. Please choose the answer that you believe is MOST accurate to each of the questions in Section 1.

1. When were you born? (drop down box with year to select)
1974
1975
1976
1977
(range 1944 – 1994)

2. What is your gender?
☐ Female
☐ Male

3. I am Catholic

☐ Yes
☐ No

4, My Church attendance is best described as:

☐ I attend Church regularly on Weekends
☐ I attend Church occasionally (more than celebration days only)
☐ I attend Church on major celebration days only
☐ I rarely attend Church
☐ I do not attend Church at all

5. Indicate the type of school you attended for your own education (tick as many as are applicable)

☐ Catholic Primary school
☐ Catholic Years 7- 10

☐ Catholic Years 11 - 12
☐ None of the above

6. Which role describes your position of leadership (select as many as appropriate)

☐ Religious Education Coordinator
☐ Department Head (KLA / Subject Coordinator)
☐ Pastoral care (Year Coordinator)
☐ Assistant Religious Education Coordinator
☐ Social Justice Coordinator
☐ Special Education Coordinator
☐ Youth Ministry Coordinator
☐ Sport Coordinator
☐ ICT / e-Learning Coordinator
☐ Other – Please specify _____

7. How long have you been in your current role? Please enter in full Years _____

8. How long have you been teaching in your current school? Please enter in full Years _____

9. What is the enrolment of your school? (select one)

☐ 501 – 700
☐ 701 - 900
☐ 900 and above

10. I have taught or I am currently teaching Religious Education

☐ Yes
☐ No

Section 2: This part of the survey is designed to gather your views of your role as a teacher and a school leader in a Catholic school. It contains scaled and open-response questions. Please choose or write the answer that you believe is MOST appropriate to each of the questions in Section 2.

Construct: Evangelisation as an expression of Self - Personal beliefs about the Evangelisation in one's self as reflected in their individual behaviour and their relationships with others. Please review the following questions (A – B6) and provide feedback on clarity and to what extent they represent this construct.

A. What does the term "New Evangelisation" mean to you?

B. To what extent do you agree with the following statements?

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
B1. I have a sound understanding of the scriptures to guide my faith.	O	O	O	O	O
B2. I am up-to-date with Catholic teachings.	O	O	O	O	O
B3. I self-articulate my Catholic values confidently.	O	O	O	O	O
B4. I allow time for personal prayer.	O	O	O	O	O
B5. I believe that Jesus is central to my life.	O	O	O	O	O
B6. I explicitly express my Catholic beliefs within my community.	O	O	O	O	O

Construct: Evangelisation as an expression of teacher - **Evangelisation as translated in one's beliefs and practices in pedagogy, curriculum planning and programming.** Please review the following questions (C1 – C7) and provide feedback on clarity and to what extent they represent this construct.

C. As a teacher please indicate the frequency of the following statements as they apply in your classroom

	Hardly ever	Occasionally	Sometimes	Frequently	Almost Always
C1. Jesus is central in my classroom	O	O	O	O	O
C2. Catholic values underpin my teaching programmes	O	O	O	O	O
C3. Gospel values inform my pedagogy	O	O	O	O	O
C4. I articulate the teachings of the Catholic Church to my students	O	O	O	O	O

	Hardly ever	Occasionally	Sometimes	Frequently	Almost Always
C5. My teaching develops in students an appreciation of Catholic teaching and values	○	○	○	○	○
C6. I ensure that my students are presented with a range of points of view, Catholic and non-Catholic	○	○	○	○	○
C7. I am culturally sensitive	○	○	○	○	○

Construct: Evangelisation as an expression of Leader - **Evangelisation as translated in one's beliefs of their role as leader in a Catholic school.** Please review the following questions (D1 – D5) anprovide feedback on clarity and to what extent they represent this construct.

D. As a leader in a Catholic school, would you see the following as your responsibility?

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
D1. To promote the dignity of each person I encounter	○	○	○	○	○
D2. To promote the parish as the centre of the local Catholic Church	○	○	○	○	○
D3. To promote an active partnership between home, parish, school and community	○	○	○	○	○
D4. To lead a range of communal prayer experiences in my school	○	○	○	○	○
D5. To work to ensure the school is recognisably Catholic	○	○	○	○	○

Construct: Evangelisation as an expression of Self - Personal beliefs about the Evangelisation in one's self as reflected in their individual behaviour and their relationships with others. Please review the following questions (E – H3) and provide feedback on clarity and to what extent they represent this construct.

E. What do you understand by the term 'Religious Formation'?

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F. In which of the listed formation experience(s) have you participated? Select as many as appropriate.

☐ Retreat (more than one day)
☐ Spirituality / Reflection Day
☐ Cross cultural immersion - local, national or international
☐ Sabbatical / Renewal leave program
☐ Volunteer (> 4 weeks) – national or international
☐ Prayer Group
☐ Tertiary accredited Formation program or course
☐ None
☐ Other _____

G. The effectiveness of formation programmes offered to me are best described as
(1 = not effective to 5 = highly effective)
○1   ○2   ○3   ○4   ○5

H. To what extent do you agree / disagree with the following statements about Religious formation

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
H1. Religious formation helps me grow in my faith	○	○	○	○	○
H2. Religious formation helps develop a deeper understanding of God	○	○	○	○	○
H3. Religious formation helps develop a deeper relationship with God	○	○	○	○	○

Construct: Evangelisation as an expression of teacher - **Evangelisation as translated in one's beliefs and practices in pedagogy, curriculum planning and programming.** Please review the following questions (I1 – I6) and provide feedback on clarity and to what extent they represent this construct.

I. As a teacher in a Catholic school please indicate the degree to which you agree or disagree with the following statements:

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
I1. Religious formation helps me grow professionally	O	O	O	O	O
I2. Religious formation is critical to each person's role in Catholic education	O	O	O	O	O
I3. Religious formation is critical to what is taught in the classroom	O	O	O	O	O
I4. Religious formation is part of professional learning	O	O	O	O	O
I5. Religious formation is necessary to adequately teach in a Catholic school	O	O	O	O	O
I6. I engage in formation opportunities only as a means to maintain accreditation	O	O	O	O	O

Construct: Evangelisation as an expression of Leader - **Evangelisation as translated in one's beliefs of their role as leader in a Catholic school.** Please review the following questions (J – N) and provide feedback on clarity and to what extent they represent this construct.

J. To what extent do you agree/ disagree with the following statements about religious formation for leadership in Catholic Secondary schools.

	Strongly disagree	Disagree	Agree	Strongly Agree	I cannot make a valid judgment
J1. The Catholic Education office offers appropriate leadership formation opportunities	○	○	○	○	○
J2. Middle leadership requires participation in religious formation to be relevant	○	○	○	○	○
J3. Religious formation assists me in my leadership	○	○	○	○	○
J4. I need to have developed profound Christian faith to function as a leader in a Catholic school	○	○	○	○	○

K. To what extent do you agree or disagree with the following statements about the Catholic Education Policy "Accreditation to Work Teach and Lead".

	Strongly disagree	Disagree	Agree	Strongly Agree	I cannot make a valid judgment
K1. I understand the policy requirements to lead in a Catholic school	○	○	○	○	○
K2. I engage in formation opportunities only as a means to maintain accreditation	○	○	○	○	○

L. Please share an example of a positive formation opportunity

M. Please share an example of a less than positive formation opportunity

N. Please share an example of how a formation opportunity has influenced your leadership

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O. Do you wish to participate in an interview? I plan to interview 15 middle school leaders to further explore how middle leaders in Catholic secondary schools experience formation to better prepare them for leadership. If you wish to participate then please click on ‹Yes›. You will be prompted to give your name, position, school and contact number. Please remember that these details are not stored with your responses to the survey.

○ Yes / ○ N

Appendix F: Final survey

Leadership Formation Survey

This research project investigates the formation for leadership in Catholic schools. The purpose of this study is to explore the formation experience of middle leaders in these schools and their perceptions of its value to prepare them for leadership. This project is being conducted by Mark Compton and will form the basis for the degree of Doctor of Education at Australian Catholic University under the supervision of Associate Professor Shukri Sanber.

There are 26 questions in this survey

Section 1

Section 1: This part of the survey is designed to gather background information that would help in the analysis of the responses. Please choose the answer that you believe is MOST accurate to each of the questions in Section 1.

[]When were you born? *

Please enter a date:

[   ]

[]Your gender *

Please choose **only one** of the following:

○ Female
○ Male

[]My Church attendance is best described as: *

Please choose **only one** of the following:

○ I attend Church regularly on Weekends
○ I attend Church occasionally (more than celebration days only)
○ I attend Church on major celebration days only
○ I rarely attend Church
○ I do not attend Church at all

[]Indicate the type of school you attended for your own education (tick as many as are applicable) *

Please choose **all** that apply:

☐ Catholic Primary school
☐ Catholic Years 7- 10
☐ Catholic Years 11 - 12
☐ None of the above

[]Which role describes your position of leadership (select as many as appropriate) *

Please choose **all** that apply:

☐ Religious Education Coordinator

☐ Department Head (KLA / Subject Coordinator) Pastoral Care (Year Coordinator)

☐ Assistant Religious Education Coordinator

☐ Social Justice Coordinator

☐ Special Education Coordinator

☐ Youth Ministry Coordinator

☐ Sport Coordinator

☐ ICT / eLearning Coordinator

☐ Other – Please specify below

[]Other - please specify

Only answer this question if the following conditions are met:
Answer was at question '5 [A06]' (Which role describes your position of leadership (select as many as appropriate))

Please write your answer here:

[]

How long have you been in your current role? Please enter in full Years

*

Only numbers may be entered in this field.

Please write your answer here:

[]

How long have you been teaching in your current school? Please enter in full Years

*

Only numbers may be entered in this field.

Please write your answer here:

[]

What is the enrolment of your school? (select one)

*

Please choose **only one** of the following:

○ 501 – 700

○ 701 - 900

○ 900 and above

[]

I have taught or I am currently teaching Religious Education

*

Please choose **only one** of the following:

○ Yes

○ No

Section 2

Section 2: This part of the survey is designed to gather your views of your role as a teacher and a school leader in a Catholic school. It contains scaled and open-response questions. Please choose or write the answer that you believe is MOST appropriate to each of the questions in Section 2.

[]

What does the term "New Evangelisation" mean to you?

*

Please write your answer here:

[]To what extent do you agree with the following statements? *

Please choose the appropriate response for each item:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
I have an adequate understanding of the scriptures that guide my faith.	◯	◯	◯	◯	◯
I am up-to-date with Catholic teachings.	◯	◯	◯	◯	◯
I self-articulate my Catholic values confidently.	◯	◯	◯	◯	◯
Prayers occur in designated lessons each day.	◯	◯	◯	◯	◯
I ensure I allow time for personal prayer.	◯	◯	◯	◯	◯
I believe that Jesus is central to my life.	◯	◯	◯	◯	◯
I explicitly express my Catholic beliefs within my community.	◯	◯	◯	◯	◯

[]As a teacher please indicate the frequency of the following statements as they apply in your classroom: *

Please choose the appropriate response for each item:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Jesus is central in my classroom.	○	○	○	○	○
Catholic values underpin my teaching programmes.	○	○	○	○	○
Gospel values inform my pedagogy.	○	○	○	○	○
I articulate the teachings of the Catholic Church to my students.	○	○	○	○	○
My teaching develops in students an appreciation of Catholic teaching and values.	○	○	○	○	○
I ensure that my students are presented with a range of points of view, Catholic and non-Catholic.	○	○	○	○	○
I am culturally sensitive.	○	○	○	○	○

[]As a leader in a Catholic school, would you see the following as your responsibility? *

Please choose the appropriate response for each item:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
To promote the dignity of each person I encounter.	○	○	○	○	○
To promote the parish as the centre of the local Catholic church.	○	○	○	○	○
To promote an active partnership between home, parish, school and community.	○	○	○	○	○
To lead a range of communal prayer experiences in my school.	○	○	○	○	○
To work to ensure the school is recognisably Catholic.	○	○	○	○	○

[]

What do you understand by the term "Religious Formation"?

*

Please write your answer here:

[]In which of the listed formation experience(s)have you participated? *

Please choose **all** that apply:

- ☐ Retreat (more than one day)
- ☐ Spirituality / Reflection Day
- ☐ Cross cultural immersion - local, national or international
- ☐ Volunteer (> 4 weeks) – national or international
- ☐ Sabbatical / Renewal leave program
- ☐ Prayer Group
- ☐ Tertiary accredited Formation program or course
- ☐ None
- ☐ Other

[]Please describe the other experience:

Only answer this question if the following conditions are met:
Answer was at question '16 [B06]' (In which of the listed formation experience(s)have you participated?)

Please write your answer here:

[]

The effectiveness of formation programmes offered to me are best described as

*

Please choose **only one** of the following:

○ Highly Effective

○ Effective

○ Neutral

○ Somewhat effective

○ Not Effective

[]To what extent do you agree/disagree with the following statements about Religious Formation? *

Please choose the appropriate response for each item:

	Strongly agree	Agree	Disagree	Strongly disagree	I cannot make a valid judgement
Religious formation helps me grow in my faith.	○	○	○	○	○
Religious formation helps develop a deeper understanding of God.	○	○	○	○	○
Religious formation helps develop a deeper relationship with God.	○	○	○	○	○

[]As a teacher in a Catholic school please indicate the extent to which you agree or disagree with the following statements: *

Please choose the appropriate response for each item:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Religious formation helps me grow professionally.	○	○	○	○	○
Religious formation is critical to each person's role in Catholic education.	○	○	○	○	○
Religious formation is critical to what is taught in the classroom.	○	○	○	○	○
Religious formation is part of professional learning.	○	○	○	○	○
Religious formation is necessary to adequately teach in a Catholic school.	○	○	○	○	○
I engage in formation opportunities only as a means to maintain accreditation.	○	○	○	○	○

[]To what extent do you agree/disagree with the following statements about The Catholic Education policy "Accreditaion to Work, Teach and Lead" *

Please choose the appropriate response for each item:

	Strongly agree	Agree	Disagree	Strongly disagree	I cannot make a valid judgement
I understand the policy requirements to lead in a Catholic School.	○	○	○	○	○
I engage in formation opportunities only as a means to maintain accreditation.	○	○	○	○	○

[]Please share an example of a positive formation opportunity.

Please write your answer here:

[]Please share an example of a less than positive formation opportunity.

Please write your answer here:

[]Please share an example of how a formation opportunity has influenced your leadership.

Please write your answer here:

[]

Do you wish to participate in an interview? I plan to interview 15 middle school leaders to further explore how middle leaders in Catholic secondary schools experience formation to better prepare them for leadership. If you wish to participate then please click on Yes . You will be prompted to give your name, position, school and contact number. Please remember that these details are not stored with your responses to the survey.

*

Please choose **only one** of the following:

◯ Yes

◯ No

[]

You selected Yes to the previous question and indicated that you wish to participate in an interview. Please remember that these details are not stored with your responses to the survey.

Only answer this question if the following conditions are met:
Answer was 'Yes' at question '25 [B15]' (Do you wish to participate in an interview? I plan to interview 15 middle school leaders to further explore how middle leaders in Catholic secondary schools experience formation to better prepare them for leadership. If you wish to participate then please click on Yes . You will be prompted to give your name, position, school and contact number. Please remember that these details are not stored with your responses to the survey.   )

Please write your answer(s) here:

Name	
Position	
School	
Contact number	